State the mission, objectives, and primary functions of this unit: The Mansfield Library, the premier research library in Montana, facilitates the intellectual and creative pursuits of all members of the University of Montana community and supports their information, education and cultural development as global citizens. The library enables the discovery, creation and expansion of knowledge through our services, instruction, collections, and programming.

The library’s Access and Collection Services Division (ACSD) focuses on building, managing and preserving a collection of information resources which support the curricular and research needs of UM. ACSD includes the following areas and functions:

- **Acquisitions, Collection Development and Electronic Resource Management** – identifies, acquires, and maintains a collection of high quality, relevant information resources; provides bibliographic, holdings and other collection assessment; provides quality control and maintenance.
- **Archives, Special Collections and Preservation** – acquires rare and unique publications, local and university history, and archival collections about the region; ensures their preservation.
- **Circulation** – staffs the library all open hours; lends, shelves, and retrieves library materials.
- **Course Reserves** - organizes print materials; makes scanned materials compliant with Americans with Disabilities Act mandates for instructors’ use on Moodle.
- **Digital Initiatives** - administers ScholarWorks to centralize, curate, preserve, and make available online the research and creative scholarship produced by UM faculty and students; coordinates digitization projects.
- **Interlibrary Loan** - borrows research materials not owned by the library and lends our materials to other libraries.
- **Paw Print** - manages printing, copying and scanning for the library and UM community. (A separate APASP report was submitted for Paw Print.)

Identify the primary users of the unit: The primary users of ACSD collections and services are members of the UM community including UM students, faculty, and staff; campus departments, colleges, and centers; and all Mansfield Library units.

External users of our services include campus affiliates; alumni; state, local, and federal entities; and the public.
Submit Organizational Chart: [link to file]

Complete the FTE Detail Excel spreadsheet provided in the link below: [link to file]

Using the space below, address any issues with your FTE Detail Sheet: The Mansfield Library tracks revenues and expenses for the library as a whole, not by the six units of analysis designated in the APASP process. The cross-unit nature of almost all of our services and activities makes any unit-specific divisions and allocations nearly impossible, and certainly not feasible in the short period of time available for this process.

- Personnel salaries specific to ACSD are reported on the FY tabs on the AS 158 (ACSD) FTE Detail Sheet, except for student employees. Wages for all library student employees are reported on the Library Administration FTE Detail Sheet. Personnel are reported according to the library’s current organizational structure.
- All General Fund revenues for all six Mansfield Library units of analysis are reported on the Library Administration FTE Detail Sheet (AS 157).
- All General Fund operational expenses for all six Mansfield Library units are reported on the Library Administration FTE Detail Sheet.
- All Designated and Foundation Fund revenues and expenses for all six Mansfield Library units are reported on the Library Administration FTE Detail Sheet.

Finance: Budget and Financial Planning, Purchasing/Procurement, Manage Student Accounts in Banner

Research: Pre-award, Post-award, Research compliance

Human Resources: Employee Training, Employee and Labor Relations, Employee Hiring (recruitment through on-boarding), Payroll Processing

Communications: Marketing and Communications, Website Maintenance/Development, Social Media, Event Planning

Development: Alumni Relations

Facility Services: Building Maintenance, Custodial Services

Criteria 1. - Bullet 1: The following list provides some of the ways ACSD supports UM’s mission, and addresses the UM2020 Strategic Plan values:

Leadership:

- Implemented a new library system, Alma, providing users easier access to a greater range of resources. ACSD employees served in key roles in this state-wide, multi-library collaboration.
- Expanded resource sharing with 24 academic libraries statewide through the Treasure State Academic Information and Library Services (TRAILS) Consortium.

Engagement:

- Employs over 50 students each year.
• Partners with the Associated Students of the University of Montana (ASUM) to archive their agendas, meeting minutes, and resolutions in ScholarWorks, empowering them to share their activities and actively document their own history.

• ACSD employees serve as members and leaders of professional, UM and library-wide committees and task forces.
• Ensures resources are available in accessible formats by procuring closed-captioned media, and scanning and making course reserve items accessible.

Sustainability:

• Acquires unique and special collections and archival materials for use by this and future generations.
• Provides analog and digital preservation of collections.
• Placed over 10,000 UM theses, dissertations, and professional papers in ScholarWorks, which archives and makes this content available worldwide.
• Analyzes available collection statistics, ranging from those compatible with Project COUNTER standards for electronic resources to circulation statistics for physical materials, informing decisions about collection development and monitoring the return on collection investments.

Diversity:

• Provides outreach, exhibits and programming on diverse topics and issues.
• Builds and maintains diverse collections to support research and creative scholarship across UM, and to help recruit and retain students and faculty.

Criteria 1. - Bullet 2.: Mansfield Library information resources are critical to research and creative scholarship at UM. ACSD acquires and manages these resources for use by the entire campus. The faculty and staff in ACSD:

• Work with faculty to identify information resources that facilitate their teaching or research.
• Plan the collections budget; monitor allocations and expenditures throughout the year.
• Participate in regional and national consortia to negotiate for the greatest depth and breadth of resources at the best possible prices.
• Manage the workflow for acquisition of new resources and maintenance of existing electronic resources. This includes vendor contacts, negotiating pricing, placing orders and renewals, receiving and processing materials, approving invoices, managing license and subscription records for electronic resources, maintaining access points on the library’s database page, and putting books on shelves.
• Work directly with vendors to troubleshoot access and delivery issues.
• Provide the technological infrastructure (ScholarWorks) that allows faculty, students, and staff to archive and share their research and creative scholarship with the world.
• Acquire, manage, preserve and provide access to unique archival collections.
• Prepare library responses to new UM curriculum program proposals and department accreditation reviews, providing information about library collections and their sufficiency for teaching, learning, and research.
• Open, close, staff and secure the building for 100% of the library’s 111 open hours each week.
Additional reductions will further diminish UM’s library research resources and require us to cut hours and services, reducing the amount of study space for students and negatively impacting knowledge creation and innovation across campus.

Criteria 2. - Bullet 1.: Trends vary.

- Seating increased 21% (FY13=1,233/FY17=1,498); seats were added in response to students’ expressed desire for the library to provide a comfortable study space (LibQUAL+®, a 2015 library quality survey).
- Group study room reservations increased and we anticipate this trend will continue.
- Gate count (people in building) decreased 9%, from an estimated 496,395 in FY13 to an electronic count of 452,093 in FY17. We anticipate use will increase as enrollment increases.
- Interlibrary Loan borrowing decreased 26% (FY13=10,892/FY17=8,016). We anticipate borrowing will flatten, or increase as the result of forthcoming collection cuts.
- Physical book circulation decreased 26% at the mountain campus (FY13=54,353/FY16=39,784) and 41% at Missoula College (FY13=1,161/FY16=679). We anticipate use of print materials will stabilize or decrease as many users prefer electronic access.
- Items added to ScholarWorks increased 273% since its late 2013 launch (FY14=8,379/FY17=31,215). ScholarWorks includes UM faculty and student publications, conference materials, and journals, and represents a collaboration with campus faculty, departments, student groups, and programs (e.g. UM Conference on Undergraduate Research). We expect continued growth in content and downloads, particularly in the areas of datasets, journals, open educational resources, and student scholarship.

Data collection and reporting for use of the library’s electronic material changed in FY13 and again in FY17, making 5 year trends unreliable. Trends below are from FY14-FY16.

- Electronic book use declined 25% (FY13=343,892/FY16=254,857), likely due to decreased enrollment and cancelling two e-book databases.
- Electronic article use increased 6% (FY13=753,601/FY16=804,286). We anticipate e-resource use will increase with enrollment and UM’s increased research emphasis.

Criteria 2. - Bullet 2.: Most use of our materials and services from external populations cannot be quantified. Because of the library’s professional commitment to privacy and intellectual freedom, we do not track the affiliation of most individuals who come through our doors or use our physical materials. We do know that elementary, high school, and prospective students; UM alumni; and researchers from Missoula, Montana, and worldwide utilize our collections, and rely on the library for government information. (We are the only full Federal Depository Library in the state). Most library items are available for check out by Montana residents. It is likely this demand will remain stable.

We cannot track affiliation for most use of our online materials. Based on trends, we anticipate demand will grow as we place more free content online and expand awareness of resources. Below are examples of demand we are able to track:

- Interlibrary Loan lending to other libraries, via OCLC global library cooperative, increased 4% (FY13=15,126/FY17=15,709). We anticipate this trend to continue.
- Online guides to archival collections increased 12% (FY13=736/FY17=827); downloads of guides increased 147% (FY13=42,135/FY17=104,364).
- Archival photographs made available online increased 17% (FY13=5,850/FY17=6,861); pageviews of these photographs increased 220% (FY13=13,290/FY17=42,548). Pageviews of
other digital collections also increased. We anticipate these trends to continue as we place more unique and regional materials online.

- Downloads of items in ScholarWorks increased 281%; in FY17 over half of the 1.2 million downloads were from individuals outside the United States, and 85% of downloads from the U.S. originated outside Montana.

Criteria 3. - Bullet 1.: The ways ACSD meets the needs of its users can be seen in accreditation reports, peer comparisons, collection growth, and responses to the library service quality survey LibQUAL+®.

- Northwest Commission on Colleges and Universities, and degree program, accreditation standards include library resources and services: self-study reports and reviews have shown the library sufficiently meets these criteria.
- The library performs a systematic review of the annual data provided by Journal Citation Reports to identify the highest impact journals in UM disciplines. The 2015 data analysis indicated the library held 89% of the top 10 journals and 78% of the top 40 journals across disciplines.
- The library is perceived to nearly meet desired expectations for print library materials, and to meet minimum expectations for electronic resources, and print or electronic journal collections, as measured by LibQUAL+® (2015).
- We had 8,379 items in ScholarWorks before the end of year one and 15,000 before the end of the second year while average repositories grow to 730 documents the first year and ~1,200 the second, evidence that we are meeting UM users’ need for a location to publish and share their work.
- There have been three consecutive years of Faculty Senate and ASUM Resolutions (Spring 2014, 2015, 2016) in support of the library and asking university administrators to not further cut the library budget. The Research Strategic Plan has a statement about protecting library resources. The UM Strategic Vision includes: "Support library instruction and collections to meet undergraduate student, graduate student, and faculty research needs."

Criteria 3. - Bullet 2.: In the past five years, the staff and faculty now working in this unit have served on and chaired numerous library committees; served on over twenty-five campus committees and task forces, including Faculty Senate, Staff Senate, DiverseU, the Writing Committee, University Council on Sexual Assault, and the Unit Standards Committee; served on five national professional committees and twelve state committees and groups; conducted peer review of journal articles and federally funded grants; and one served as national editor-at-large for a major publication in the field.

We are committed to continuing our professional development to improve our knowledge and in turn the library’s resources and services, and our internal standards and workflows. We attended over forty professional conferences, and hundreds of hours of workshops, webinars and courses. Training and development topics include metadata, digitization, and digital preservation. Specialized training is pursued to stay current with Alma, the complex and ever-evolving system used to run all aspects of library operations. We engage with the other members of the TRAILS consortium to share information and develop best practices.

Criteria 3. - Bullet 3.: ACSD currently has five faculty members, only two of whom have been at UM for more than 5 years and one of whom, an adjunct, does not have research / creative scholarship as part of her activities. Our unit’s commitment to quality scholarship is evident in our unit standards, in the outlets in which our staff and faculty present and publish, and in the receipt of competitive federal grants.

Presentations by faculty were made at more than 20 local, state and national venues, including the Clark Fork Symposium; the Montana Library Association, Society of American Archivists, and American
Library Association annual conferences; and at the International Conference on Learning, Teaching, and Student Success. Publications include three book chapters and seven journal articles, including publication in the *American Archivist* and the *Journal of Librarianship and Scholarly Communication*. Two faculty members served as co-PIs on grants from the Institute for Museum and Library Services and the National Endowment for the Humanities totaling over $55,000.

**Criteria 3. - Bullet 4.:** All four tenure-track faculty in the ACSD unit teach/instruct as part of their activities, although no faculty member has primary responsibilities in this area. Evidence of productivity in the last five years includes offering course-integrated instruction sessions, credit courses, internships and workshops. Faculty in this unit:

- Co-taught for-credit courses during 9 semesters.
- Taught over 20 sessions of course-integrated instruction each year.
- Taught or co-taught 14 workshops for the UM community.
- Taught workshops and for-credit internships to students at other institutions, and to professionals in the science, library and archives fields.

Evidence of quality takes the form of student evaluations, and responses to the library service quality survey LibQUAL+® (2015) and the National Survey for Student Engagement Information Literacy Topical Module (NSSE) (2016). Survey responses provided below are for all instruction done at the library, including that done by ACSD faculty.

- 90% of students rated library instruction sessions ‘very effective’ or ‘effective’ overall, as measured by student evaluations (n=1,360).
- Among the information literacy questions on LibQUAL+®, undergraduate respondents (n=487) rated highest the library’s support for enabling them to be more efficient in their academic pursuits or work.
- 80% of undergraduate seniors (n=413), and 67% of first-year students (n=267), reported their experience at UM contributed to their knowledge, skills, and personal development in using information effectively, as measured by NSSE.

**Criteria 4. - Bullet 1.:** The Mansfield Library tracks allocations/revenue and expenses for the library as a whole, not by the six units of analysis designated in the APASP process. The cross-unit nature of almost all of our services and activities makes identification of allocations and expenditures specific to the Access and Collection Services unit not feasible, especially in the short period of time available for this process. The main categories of library revenue/allocations and expenses are listed in the Library Administration unit of analysis report (AS 157).

**Criteria 4. - Bullet 2.:** ACSD has lost or had frozen nine positions (8.25 FTE) since FY15. Impacts are felt across the library, as work in each unit is dependent on services provided by other units. Our library is small enough that there is little overlap in the daily tasks we perform; each loss necessitates retraining or results in dropped services. There are two main negative impacts at this time:

- Circulation, the front-line area that keeps the library open and secure, has lost two of its four supervisor positions. These positions manage the building; oversee the student employees who check out and shelve books; support instruction by maintaining Course Reserves; and provide many other services. The remaining Circulation staff forgo vacations and come to work sick to mitigate the impact of their absence on the library and on their colleagues.
• The loss of a staff member in Digital Initiatives has greatly reduced our ability to make our
unique and university-generated collections available online, for which there is demonstrated
increasing demand.

The library experienced a 31% reduction to its collection budget between FY13 and FY18. ACSD has
taken every measure to ensure efficiencies and minimize impact to UM, but large collections cuts will hit
campus in Spring 2018, reducing research resources for most disciplines.

Additional reductions will further diminish UM’s library research resources and require us to cut hours
and services, reducing the amount of quiet and group study space for students and negatively impacting
knowledge creation and innovation across campus.

**Criteria 4. - Bullet 3.:** Efforts to improve efficiency include review of unit workflows, training, and
collaborations. There are no benchmarks available. Examples of our many efforts and their impacts
include:

• Formed the TRAILS Consortium with 24 Montana academic libraries; purchasing of databases
and ejournals through TRAILS over the last two years results in a savings of $25,000 a year.
• Cross-trained employees from several library units to provide basic reference and technical
support, supervise the Paw Print evenings and weekends, make documents accessible for Moodle,
and post items to ScholarWorks.
• Trained staff in other campus units to upload and maintain their own ScholarWorks collections.
• Collaborated with other library units and externally with Disability Services for Students and
Assistive Technology Services to enable the library to meet accessibility standards and improve
access to collections.
• Streamlined internal ordering, cataloging, and processing operations. For example: modified
workflow for receiving requests from campus for newly published books, resulting in expedited
purchasing time and decreased staff time.
• Collaborated with Montana University System Office of the Commissioner and Montana State
University to create a records retention schedule, improving the efficiency of transferring and
maintaining the university’s archival records.
• Collaboration among the library’s Archives and Special Collections, Digital Initiatives, and
Bibliographic Management Services units increased the discoverability, and in turn use, of our
unique and popular online materials/collections.
• Collaboration within library units facilitated the acquisition and maintenance of hardware,
software and cloud services to manage and preserve large amounts of born-digital archival
material.

**Criteria 4. - Bullet 4.:** The majority of activities and services in ACSD do not generate revenue.

The Mansfield Library tracks revenues and expenses for the library as a whole, not by the six units of
analysis designated in the APASP process. The way we track revenue and expenses, and the cross-unit
nature of almost all of the library’s services and activities, makes calculation of ACSD expenses
supported by ACSD revenue impossible.

The Circulation area of this unit generates some revenue from fines and fees (such as for overdue and
damaged books). This revenue is reported on the Mansfield Library Administration unit report (AS 157).
Archives, Special Collections and Preservation sells archival photograph reproductions and provides
scans and photocopies of collection material. This revenue is considered a photocopy/reproduction
service and is tracked and reported as designated fund revenue generated by the Paw Print. Paw Print
Criteria 5. - Bullet 1.: 1. Engaging Students Where They Are

- ACSD employs a large number of students. These employment opportunities are an essential part of student retention efforts. (Some later go on to become professional librarians and archivists.)
- The Digital Initiatives Librarian is working with other campus units to develop a program that would reduce textbook costs for students and support the completion of general education requirements online.
- We acquire closed-captioned media, make course reserves accessible, work with vendors to improve the accessibility of online interfaces, and otherwise strive to meet student learning needs.

2. Invest in People

- We participate in professional development that allows us to keep up with the evolving nature of 21st century librarianship.
- We develop collaborations and leadership skills by serving on library, campus, state and national committees and projects.

3. Partner with Place

- The library is open to the public; ACSD keeps the building open, and acquires and manages the collections they use.
- Archives and Special Collections works closely with community businesses and individuals who need information about the history, activities and people of this region.

5. Foster Knowledge Creation and Innovation

- ScholarWorks is dedicated to knowledge creation and dissemination; UM student and faculty research and creative activity is archived and made available to the world through ScholarWorks.
- The Strategic Vision clearly states “Support library instruction and collections to meet undergraduate student, graduate student, and faculty research needs.” We acquire, maintain and update access to the research collections that are an essential piece of meeting those research needs.

Criteria 5. - Bullet 2.: Many of the services provided by the Mansfield Library’s ACSD unit are unique on campus. As the nature of the academic library changes in the 21st century, and in response to staff reductions due to the budget shortfall, internal restructuring and re-allocation of work has been happening across the library for years. Through extensive collaborations within and outside of the library, several of which have been noted in this document, we strive to maximize services to our users in an effective and efficient manner.

Examples of current and potential collaborations with campus units include:

- Collection development efforts depend on faculty and student input. This campus-wide collaboration is essential to determining what new resources are needed and also what older resources can be eliminated, freeing up funds or space for new acquisitions.
- ACSD units, including Digital Initiatives and Archives, could partner with faculty and students on digital humanities projects, centralizing and building on the existing expertise and
infrastructure in the library to produce and sustain these kinds of projects, which should reduce costs across campus by making it unnecessary for other units to build capacity for them.

**Criteria 5. - Bullet 3.:** Additional resources would be used to revive the library’s collections. The collections budget has been reduced by a devastating 31% since FY13. These collections are critical for the research, teaching, and learning needs of our students, faculty and staff, and are necessary to sustain and increase UM’s research, scholarship and productivity. While not a direct revenue generator, these collections support grant writing, accreditation, recruitment, and retention.

Beyond restoring and enhancing the library’s core research collections, additional resources could be used to:

- Hire staff to ensure the library remains open the 111 hours/week we offer today. We consistently hear from students that they want us to be open 24/7.
- Hire staff for Digital Initiatives.
- Make more of the university’s research and creative scholarship available online through ScholarWorks.
- Increase the number of paid and unpaid internships and service learning activities we offer.
- Sustain and grow professional development to support the needs of the 21st century library.
- Restoring lost positions would enable library faculty to better achieve their service and research responsibilities.

With additional resources we would invest in or expand these initiatives:

- Develop a sustainable Open Educational Resources program, reducing textbook costs and supporting student success and retention.
- Pursue more grants and revenue-generating digital projects.
- Provide more scholarly communications outreach to campus.
- Help UM departments and faculty manage their physical and electronic records and data effectively and efficiently.
- Partner with Place by increasing access to local and regional collections in Archives and Special Collections.