Harper Adams University: Protecting and Improving Library Services

A small academic library at a specialist university transformed its services and operations through Alma, Primo and Leganto.

About the Harper Adams University

Harper Adams University, located in Newport, Shropshire, United Kingdom, is a leading specialist university providing higher education for the agricultural and rural sector. Founded in 1901 and set within a 635-hectare working farm, the institution focuses on food production and processing, veterinary sciences, engineering, land management, and sustainable business. Harper Adams offers more than 50 foundation, undergraduate and postgraduate degree programs and attracts students from over 30 countries, with 800 students living on campus. The university has been recognized as a first- and second-place winner in the context of the Whatuni Student Choice Awards, as well as UK's Best Modern University four years in a row.

About Bamford Library

Bamford Library at Harper Adams University provides a wide range of learning resources and services. Its collection includes around 32,000 print books, over 150,000 e-books, over 50,000 journals in print or electronic format, and the course-relevant databases. The library staff of ten offers university students group and one-on-one tutorials on literature searching, critical evaluation and referencing, as well as assistance with their queries. The Bamford Library building, located at the heart of the campus, is an award-winning example of sustainable design.

> *We didn't have to consider furloughing staff or reducing hours, even at the lowest point of the pandemic, thanks to the workflows and web-based nature of Alma.*
>
> **Laura Pilsel,** University Librarian and Head of Registration, Assessment Records and Awards

Starting from Scratch

Bamford Library faces the same constraints and limitations common to many other university libraries, despite its comparatively small size. The small team and limited budgets require staff to be multiskilled and flexible. Nonetheless, the library shares the same concerns, aspirations and ambitions like those of larger institutions, as well as serving a student body with the same expectations and needs as their peers at other universities.

In 2014, the library decided to migrate to a new library management system, which required a tender. The request for proposal (RFP) framed the search in terms of the capabilities of the system the library was already using. The result was the adoption of Sierra from Innovative.

After four years, in 2018, the library developed specifications for a new library service platform, discovery layer and reading list management system, following a renewal and tender requirement by the University.

To that end, the library staff carried out in-depth research on available systems, including reading analyses and user reviews, site visits, and research into what Harper Adams students expected from a library system. More broadly, they looked into what libraries were doing globally with their library management processes and systems, as well as holding internal discussions on what the library staff wanted out of the system.

The information collected led to a new, more open-ended approach to the tender. Rather than seeking proposals to address specific predefined problems, the library asked potential vendors to present their capabilities for helping make all library management process less complicated even if it meant changing familiar workflows and practices.

During the tender period, the newly appointed Library director, Laura Pilsel, sought to use the opportunity to reconsider the Bamford Library management processes and its systems, and became part of a much broader library transformational programme.

A Transformative Solution

After an intense, comprehensive process - from background research to proposal evaluations - Harper Adams University selected Ex Libris Alma as its library services platform. In addition, shortly thereafter the library adopted Leganto, the Ex Libris reading list management tool, and Primo for discovery. The Library was already a subscriber to RefWorks for reference management.

A primary reason for the decision was Alma's comprehensiveness, with a unified framework for managing print, e-resources, and digital assets. The integration with other Ex Libris solutions, such as Primo and Leganto, was also an important consideration, providing users seamless access to one solution from another as needed. Similarly, noteworthy for Bamford Library is Alma's capacity to communicate with non-library university systems for sharing data. Moreover, Alma met expectations shared by student focus groups regarding what they wanted from a library system, such as convenience and flexibility.

Alma's capabilities were seen as contributing to the transformation and streamlining of processes that the library team was looking for. In addition, interviews with Alma customers persuaded the decision-makers that Alma had extensive potential and an impressive roadmap.

After the green light for Alma came implementation. The Bamford Library team said the project plan presented by Ex Libris was very thorough, with detailed and clear expectations, timelines and milestones. The company provided a wealth of documentation, training and support throughout, with bi-weekly calls, defined goals, larger project meetings, and an online "basecamp" where direct questions could be asked whenever needed. According to Curwen Thomas, Deputy Head, Library Services, the Ex Libris team listened to feedback from the library throughout and a great working relationship developed.

As Alma represented a transformative change for Bamford Library, it was accompanied by an expansion in the skillsets of library assistants. The team had to adapt to the automation of certain activities, the reorganizing of others, and new ways of thinking about their tasks.

The library team also decided that the migration to Alma, with its consolidated management of library collections, was the impetus needed to undertake a weeding process. The library removed many print books and journals that were no longer in use or underused, as it extensively expanded its e-resource and digital assets.

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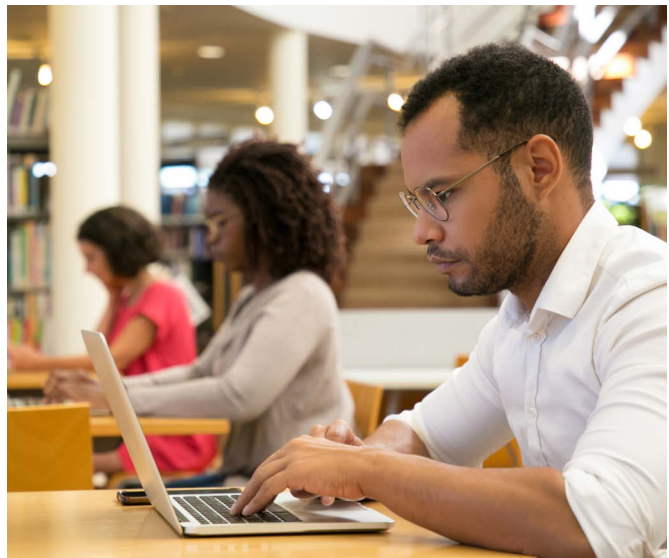
Flexibility, Simplicity, Customizability

With its extensive automation, integration and customizability, Alma revolutionized Bamford Library management processes from start to finish. Library staff are saving a tremendous amount of time that used to be spent on inefficient manual tasks thanks to faster and more concise workflows.

"It's been brilliant," Curwen said. "We are now free to spend time on strategies, special projects and the other patron support work we do."

With processes made so much easier and more efficient, library staff was able to take on more diverse roles. The additional training offered to library assistants, for example, has been a force multiplier for various library projects.

Alma's intuitive user experience and flexibility ensured that the platform was rapidly adopted and adapted to meet the needs of the Harper Adams University library. Curwen called the solution "very safe to experiment with," which was particularly valuable as the library team was adjusting to a new way of doing things.

"You can try things," she said, "and know you're not going to break anything or cause havoc."

In addition, there was no need to be strict in defining how library staff used Alma and other Ex Libris solutions to achieve their goals. There are multiple pathways to reach the same result, allowing each user to find what works best for them in each library process.

Acquisitions, fulfillment and resource sharing

One of the most impactful applications of Alma was for acquisitions. The automation of routine tasks and the use of APIs for interacting with Oasis and the British Library streamlined the process, saving time and labor.

The workflow changes have also meant that fulfillment for patrons improved in terms of time, convenience and comprehensiveness. One aspect of this was a new level of detail on circulation data that has impacted decision-making on resource use and retention. Another process for which many manual steps have been eliminated is the management of hold-shelf listings. Bamford Library now uses an automated process indicating to librarians which items on reserve can be returned to circulation (i.e., their hold request has expired).

The integration of Alma and Primo has made resource sharing workflows slicker and more streamlined than in the past. A patron searching for a resource not held in the local collection can trigger a request for the item directly from within the Primo discovery interface, which automatically populated fields for processing through Alma.

Another time-saver that benefits both librarians and patrons is the Bamford Library's use of automatic alerts when links to resources from within Alma, Primo or Leganto are broken. The alerted library staff can then immediately determine the reason for the apparently missing resource, correct the issue, clarify with the patron if needed, or contact the relevant technical support person.

Improved satisfaction for all

The efficiency and optimizations introduced by Ex Libris solutions produced positive feedback from library staff, as well as from faculty and students.

Staff members - who are now involved in more interesting activities, more of the time - thanks to Alma - expressed greater job satisfaction. During the migration phase, as well, faculty members who were involved in the process provided positive feedback to the library staff about what Primo and Leganto could accomplish. Finally, after the launch of the Ex Libris solutions, returning students were enthusiastic about the transformation they saw in their interactions with the library.

Covid-19 hits: Alma keeps the library running

When the Covid-19 pandemic struck the United Kingdom with force, the earlier transition to Alma, Primo and Leganto ensured Bamford Library could continue to function even as the Harper Adams University campus was locked down.

All members of the library team have been able to continue working remotely and do so effectively, due to the web-based natures of their systems and workflows that were easily adaptable to changing circumstances (this being key as they worked fully from home for four months before a partial return to campus from July 2020, and the team has been operating part on-campus/part home-working arrangements ever since). For example, patrons can search and request resources online from anywhere, requests coming through Primo for print assets enter a pick-from-shelf queue in Alma for processing whenever library staff members are periodically allowed to be on campus. This developed into a 'Click and Collect' Service, which has been positively received.

"We didn't have to consider furloughing staff or reducing hours," Laura said. "I could not have asked for more. So much of that is because of the workflows and web-based nature of Alma."

More broadly, the pandemic led to a cultural change at the university that has affected students and the library alike. There was a massive shift to greater use of e-resources and digital resources, as opposed to a previous focus on print. As the demand for resources that can be accessed remotely soared, so too did the library's emphasis on obtaining and providing those kinds of assets.

Raising the library's profile

Alma's reporting feature made it possible for Bamford Library to raise the profile of the library, including highlighting its importance and capabilities during campus lockdowns.

The library is able to provide regular, detailed updates to the institution's Board of Governors based on content and analysis from Ex Libris solutions. The university executives got a clear understanding of how the library leadership is forward-thinking and maximizing the value of the technology in which it invested.

These benefits were noted even before Bamford Library deployed the full Ex Libris suite.
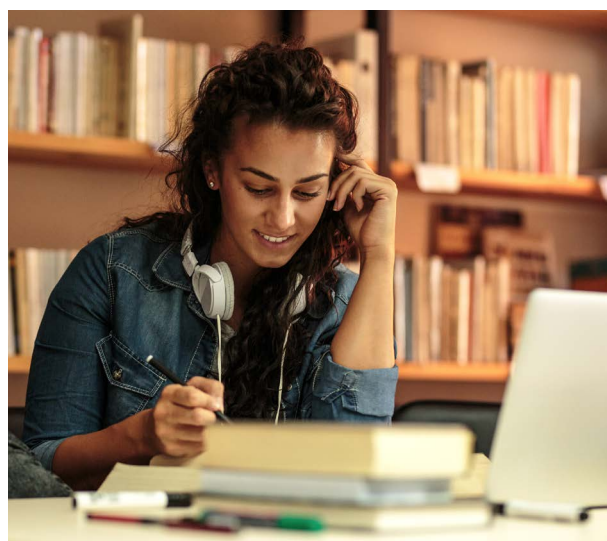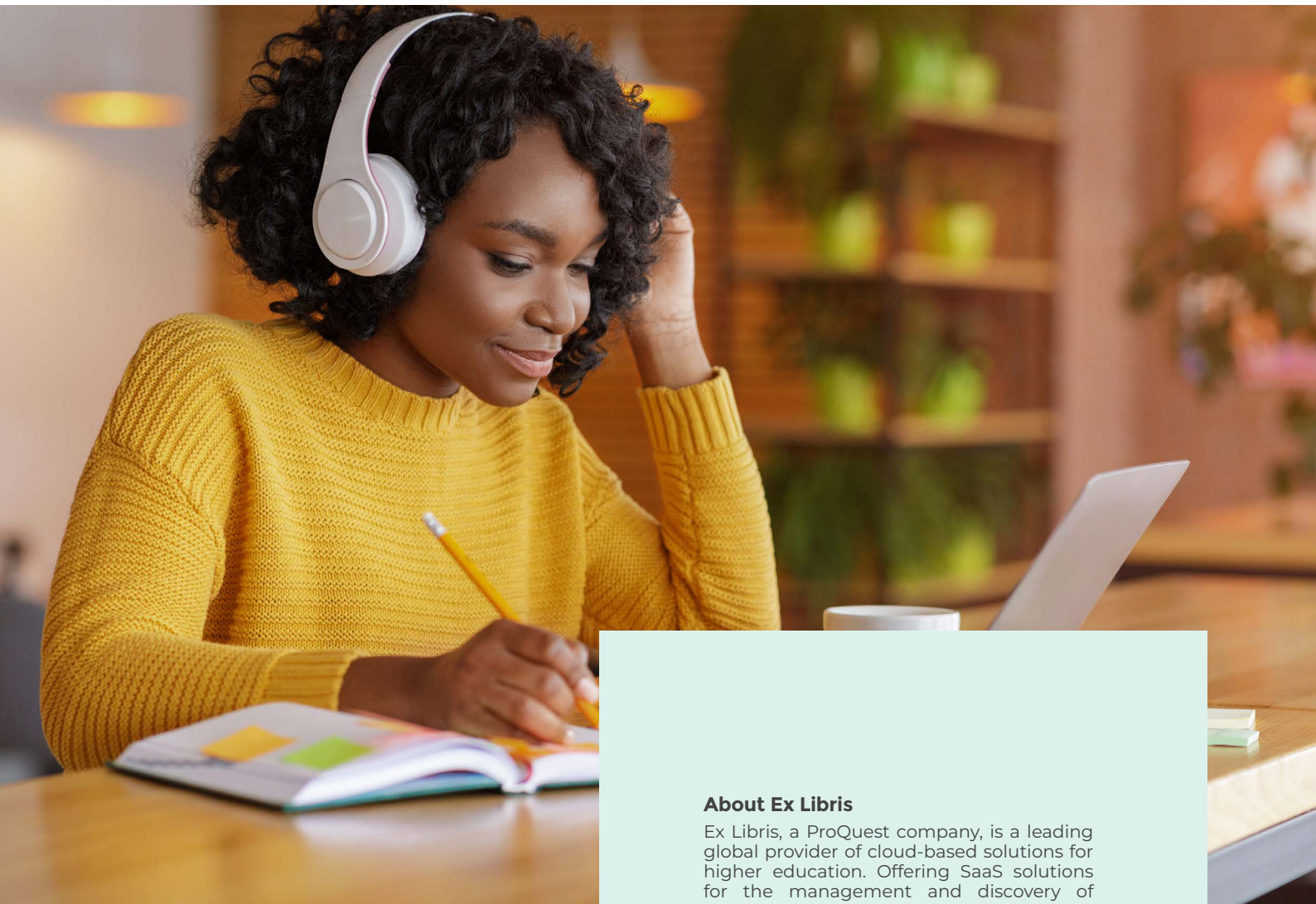
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