Our Agenda

• EAST governance update
• Results of Validation Sample Study #1
• The EAST retention model
• From retention to allocation
• Disclosing retention commitments
• Policy work and MOU
• EAST outreach
• Q&A – will be throughout as well as at the end
EAST governance

John Unsworth, EC and Mellon co-PI

Tara Fulton, EC and Mellon co-PI

Anna Perricci, Project Manager
Sara Amato, Data Librarian
Matthew Revitt, Consultant
EAST Major Milestones - 2016

- Data extracts for collection analysis - complete
- GreenGlass rolled out – complete
- Development of retention model(s) – complete
- EC approves final model – COMPLETE!
- Retention proposals reviewed – June 24 through July 29
- Retention commitments in GreenGlass – by mid to late August
- Disclosure of retention commitments – late 2016

- Policy reviews by MWG – In process
- Major policies submitted to EC for approval – In process
- MOU developed – In process for completion in Sept.
- MOU to EC for approval – Sept./Oct.
- VSS#1 – COMPLETE!
- VSS#2 planning – July – August
- VSS#2 conducted – Oct./Nov.
Validation Sample Study # 1

• THANK YOU!
• 97% of monographs accounted for
• 90% in average or excellent condition
• 10% marked as in “poor” condition
• Will develop guidelines on repair, replacement or reallocation of titles not suitable for lending
• More details forthcoming
Some other interesting data points...

Items published pre-1900 are in poorer condition overall:

Widely circulated items are slightly more likely to be unaccounted for:

Questions?
The EAST Retention Model

- Retain all scarcely held
- Retain up to 5 of frequently used
- Retain one of everything else
For most libraries: A maximum of 36% holdings to be retained

A few exceptions:

- Five Colleges Depository at 100%
- U Mass-Amherst at up to 90%
- Yeshiva University at up to 60%
- Elms College at up to 50%

### Estimated Retention Results

<table>
<thead>
<tr>
<th>LIBRARY</th>
<th>TOTAL TITLES</th>
<th>RETAINED TITLES</th>
<th>RETAINED PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amherst College</td>
<td>606,537</td>
<td>219,649</td>
<td>36%</td>
</tr>
<tr>
<td>Boston College</td>
<td>1,045,648</td>
<td>378,669</td>
<td>36%</td>
</tr>
<tr>
<td>Boston University</td>
<td>632,331</td>
<td>228,991</td>
<td>36%</td>
</tr>
<tr>
<td>Brandeis University</td>
<td>789,877</td>
<td>286,045</td>
<td>36%</td>
</tr>
<tr>
<td>Bridgewater</td>
<td>224,720</td>
<td>81,380</td>
<td>36%</td>
</tr>
<tr>
<td>Bryn Mawr College</td>
<td>457,798</td>
<td>165,786</td>
<td>36%</td>
</tr>
</tbody>
</table>

### (ANY EDITION)

- Publication year BEFORE 2011
- Ephemera
- NOT EPHemerA

### RETAIN 5

- Aggregate uses MORE THAN 30

### Publication year BEFORE 2011

- Ephemera
- NOT EPHemerA

### Microsoft Document Connection

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EAST
EASTERN ACADEMIC
SCHOLARS' TRUST
From retention to allocation

• EAST retention model approved by EC on June 6\textsuperscript{th}
• SCS now begins the allocation process
• SCS developing a video to provide to EAST libraries on how to review the allocations
• Anna will be in touch once the allocations are available to be downloaded by each Retention Partner– expect an email to go out @June 24th
• Libraries will be asked to complete their review by July 29
Disclosing retention agreements and other post allocation work

• OCLC work on a new batch disclosure tool

• The EAST “583” committee
  • Focus on developing guidelines for EAST members to update local ILS’ and union catalogs
  • Chaired by Sara Amato and working with representatives of the different ILS’ in EAST

• Goal is to have documentation available by summer’s end

• See also videos from SCS on post-allocation which provide guidance on using GreenGlass to generate reports in support of local collection development and eventual de-selection/weeding

Questions?
Policy and MOU Work

• Focus on policy first, MOU language second
• Policy subgroup of the Monograph Working Group working with the East team, led by Matthew Revitt
• Policies based on those coming out of the planning process
• MOU discussions have begun based on agreed upon policies
• Executive Committee reviewing and approving as developed by Policy subgroup
• Review by EAST community with formal MOU and agreed policies in place by late fall, 2016
• EAST members execute MOU as approved by EC – expected by December, 2016
Examples of the Policies

- Selection
- Ownership and Location
- Retention
- Validation
- Access & Fulfillment
- Delivery
- Operating Procedures
- Disclosure
- Discovery

- Expect to add policies relating to retained holdings found to be in unacceptable condition or missing as well as those relating to member’s inability to continue their retention commitments
Other Ongoing Work of the EAST Team

• Validation Sample Study #2 – planning to begin July with statistical consultant and implementation to commence in fall
  • REMINDER: Please DO NOT weed before this is completed. If you must, please notify us.

• EAST outreach
  • PAN meeting at ALA
  • “EAST by Northeast” article http://digitalcommons.du.edu/collaborativelibrarianship/
  • Recent presentations at ACRL New England and NETSL by Anna/Matthew
Member Meeting and Funder Reporting

• Planning for a Membership meeting on October 14th in Boston – for both current and potential future members – please SAVE THE DATE

• Formal report to the Davis Educational Foundation on collection analysis work – June 30th

• Formal report to Mellon on FY16 work – September 30
Eastern Academic Scholars’ Trust

We aim to preserve access to printed scholarly texts, while freeing library space for new uses.

Collection Analysis
- Participating member libraries undergo a thorough collection analysis to determine Mauris porttitor purus non erat elementum.

Validation
- Member libraries validate the findings of the collection analysis by non erat elementum lacus. Aliquam vel laculis nulla lorem.

Retention & Access
- Members agree to retain selected print titles for 15 years, and guarantee access by Mauris porttitor purus non erat elementum.
Responsibilities of Members Remainder of 2016

• Retention and allocation
  • Review initial retention allocations – by July 29th
  • Retention commitments finalized in GreenGlass – August
  • Final MOU – Sept./Oct.
  • MOU executed by members – Oct. – Dec.

Reminder: Libraries should wait to commence any weeding and deselection until VSS#2 is completed in the fall whenever possible.

• Other
  • VSS #2 – details TBA in July/August
  • Disclosure – details from 583 group
  • Come celebrate with us and promote EAST – October 14, 2016 in Boston – details forthcoming

THANK YOU!
Thank you.

Q & A

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