Leveraging your investment in EAST: A series of perspectives

Ruth Fischer

OCLC/Sustainable Collection Services

GreenGlass was purpose built

- To help groups like EAST understand their shared collection as a single collection and to come to consensus about an appropriate retention model.

- To provide individual libraries with the tools to understand their own collection in the context of the collective collection, and to make efficient, well-informed decisions about what to withdraw, while protecting their committed retentions.

OCLC

GreenGlass access

EAST Cohort 1

through <u>October 2018</u>

EAST Cohort 2

through <u>January 2021</u>

Registering retentions in WorldCat

- There is no additional cost for this service; it is included in your OCLC cataloging subscription fees.

- **Libraries will use GreenGlass to create a file of retained titles for upload to OCLC** – containing OCN and bib rec # --- and complete an online form with 583 field action note details. (Update your retention commitments!)

- This process will create a new shared-print LHR in WorldCat and this approach makes the second SP symbol obsolete.

OCLC

Explore GreenGlass Remediation Lists

Identify Possible Duplicates

- Lots of academic libraries see multiple copies to be low-hanging fruit for weeding.

- EAST expects you to retain one copy of titles committed for retention.

- Your list of Possible Duplicates is one of the 'Remediation Lists' in GreenGlass.

- There is a tutorial that will help you navigate the list.

OCLC

	OCLC NUMBER	LOCATION	ENUMERATION	COPY NUMBER	POSSIBLE DUPLICATE	TITLE
>	1000029	ONL-NDL_STACK			Yes	The story of the Catholic church, by Cuthbert Wright./New York, A. & C. Boni, 1926.
>	1000029	ONL-NDL_STACK			Yes	The story of the Catholic church, by Cuthbert Wright./New York, A. & C. Boni, 1926.
>	1000029	ONL-STACK			Yes	The story of the Catholic church, by Cuthbert Wright./New York, A. & C. Boni, 1926.
>	1000035	ONL-STACK			Yes	A new dictionary of the English and Italian languages, containing the whole vocabulary in general use with copious selections of scientific, technical and commercial terms, and others lately brought into use with the pronunciation figured, by Arthur Enenkel; rev. and cor. by J. McLaughlin./Philadelphia, D. McKay [1912]
>	1000035	ONL-NDL_STACK			Yes	A new dictionary of the English and Italian languages, containing the whole vocabulary in general use with copious selections of scientific, technical and commercial terms, and others lately brought into use with the pronunciation figured, by Arthur Enenkel; rev. and cor. by J. McLaughlin./Philadelphia, D. McKay [1912]

Identify Multi-Edition Titles

- GreenGlass is the only library system that takes advantage of the OCLC Work ID.

- This link pulls together multiple editions of the same work, making it possible for experts within GreenGlass libraries to conveniently determine which editions have been superseded, and which editions should be retained.

- Your list of Multi-Edition Titles is one of the 'Remediation Lists' in GreenGlass.

- There is a tutorial that will help you navigate the list.

OCLC WORK ID	OCLC NUMBER	CALL NUMBER	LOCATION	TITLE	EDITION	OPAC
1154369647:eng	25631953	PR3551 .C27 1992	ONL-STACK	The complete English poems / John Milton ; edited and introduced by Gordon Campbell]./New York : Knopf : Distributed by Random House, 1992.		OPAC
1154369647:eng	25631953	PR3551 .C27 1992	ONL-STACK	The complete English poems / John Milton ; edited and introduced by Gordon Campbell]./New York : Knopf : Distributed by Random House, 1992.		OPAC
1154369647:eng	59235942	PR3551 .W7 1980b	ONL-STACK	The complete poems / John Milton ; text edited by B.A. Wright ; introduction and notes by Gordon Campbell./New ed./London : Dent ; New York : Dutton, 1980.	New ed.	OPAC
1154369647:eng	20825900	PR3551 .S4 1971b	ONL-STACK	The complete poetry of John Milton : arranged in chronological order with an introduction, notes, variants, and literal translations of the foreign language forms / by John T. Shawcross./Rev. ed./New York : Anchor Books, 1971.	Rev. ed.	OPAC
1154369647:eng	9079	PR3551 .C3	ONL-STACK	The poems of John Milton; edited by John Carey and Alastair Fowler./Harlow, Longmans, 1968.		OPAC

Cataloging Support

- Records for which SCS has assigned an OCN

- Records without OCNs

- Titles with an author/title risk

- Holdings not set

Out-of-Scope Items

- Contains all of the GreenGlass data elements for every item, including location, call number, overlap tallies, HathiTrust status, usage data, URLs, etc.

- There is a tutorial that will help you navigate the list.

Known-Item Search

- Allows GreenGlass users to retrieve an item or a set of items by barcode number, bib record number, OCN, or Work ID

- Quick answers to questions about retention

- Replacement questions or projects

OCLC

WorldCat OCLC #: 9079

1 ITEMS

CALL #	LOCATION	TITLE	OPAC
⌄ PR3551 .C3	ONL-STACK	The poems of John Milton; edited by John Carey and Alastair Fowler./Harlow, Longmans, 1968.	OPAC

LOCAL TRANSACTION DATA - TITLE LEVEL

Recorded Uses	4
Allocated for Retention	Yes

FORMATS

Bib Record Type	Book
Primary Language	eng
Possible Duplicate	No

GROUP DATA

EAST Holdings	12
Aggregate Uses	135
Ephemera	No

WORLDCAT HOLDINGS

US Holdings	210 / 3,470
Massachusetts Holdings	8 / 114
Comparator Libraries	34 / 75

OTHER

HathiTrust IC/PD	Yes / No

▲ HIDE DETAILS ABOUT HOLDINGS ▲

COMPARATOR LIBRARY HOLDINGS

Maine Shared Collections	1 / 7
Regional Large Academic Libraries	16 / 20
Regional College Libraries	4 / 13
Boston Library Consortium (BLC)	5 / 13
CNY Retention Partners	0 / 0

EAST HOLDINGS

Boston College *
Boston University
Bryn Mawr College
Connecticut College
Loyola Notre Dame *

HathiTrust URLs
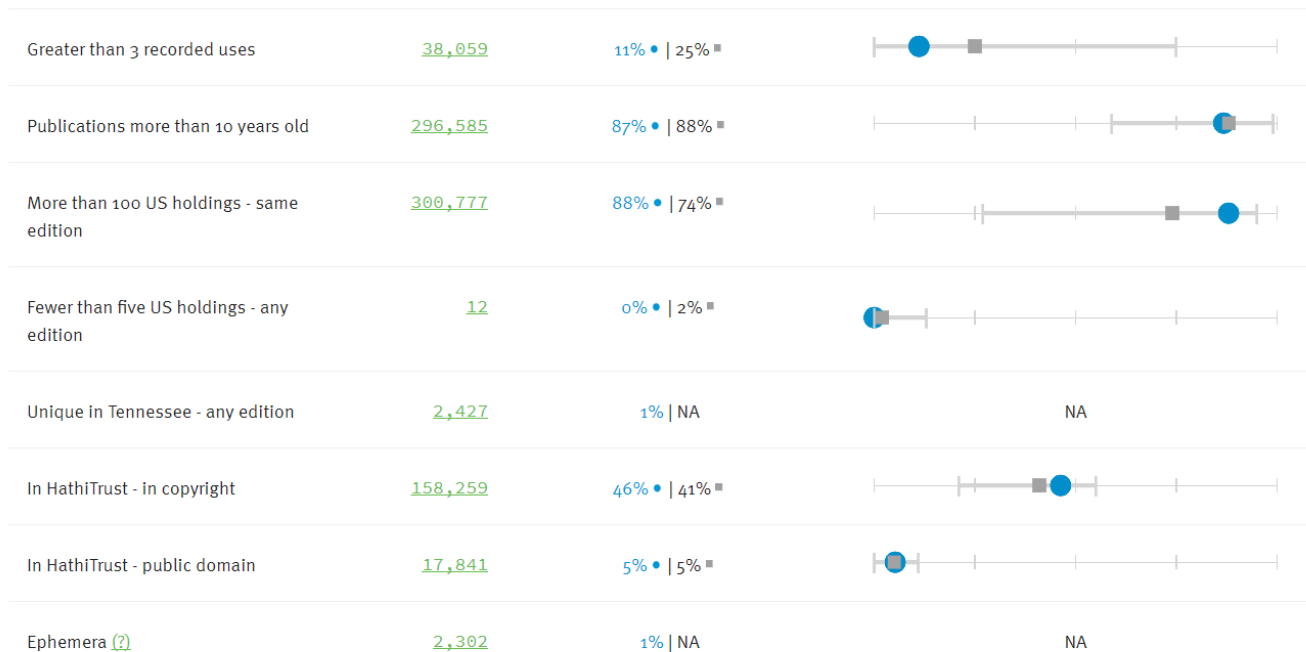
|			
Greater than 3 recorded uses	38,059	11% • | 25% ▪	
Publications more than 10 years old	296,585	87% • | 88% ▪	
More than 100 US holdings - same edition	300,777	88% • | 74% ▪	
Fewer than five US holdings - any edition	12	0% • | 2% ▪	
Unique in Tennessee - any edition	2,427	1% | NA	NA
In HathiTrust - in copyright	158,259	46% • | 41% ▪	
In HathiTrust - public domain	17,841	5% • | 5% ▪	
Ephemera (?)	2,302	1% | NA	NA

Sub-Group Functionality

- Additional analysis for libraries within a specific region

- Subject analysis

- Prospective/coordinated purchasing

OVERVIEW **VISUALIZE**

| GROUP OVERLAP ▾ | WORLDCAT HOLDINGS ▾ | TITLE-SET ATTRIBUTES ▾ | SUBJECTS ▾ |

GROUP OVERLAP

Participant holdings

Group Overlap tallies (for participant libraries) always represent exact edition matches – using the O
tallies are calculated by SCS using the bib records we received from each participant library. All othe
on holdings set in WorldCat.

PARTICIPANT HOLDINGS OVERLAP
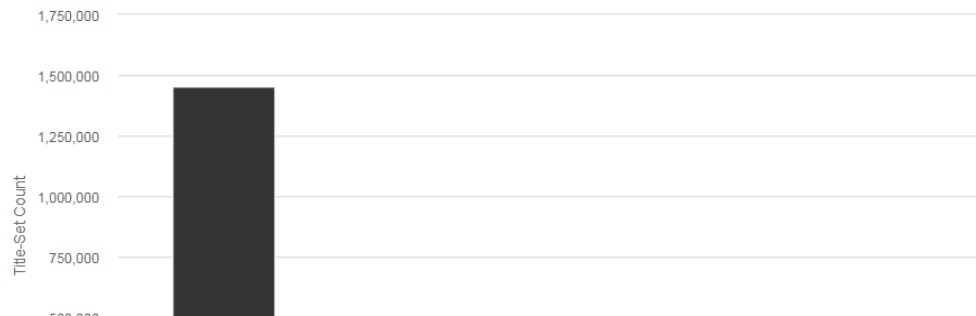
LIBRARIES

✓ Boston College

Check All

☐ Amherst College

☑ Boston University

☑ Brandeis University

☐ Bridgewater

☐ Bryn Mawr College

☐ Colby

☐ Connecticut College

☐ Elms College

☐ Fairfield University

☐ Five Colleges, Incorporated

☐ Hampshire College

☐ Haverford College

☐ Lafayette College

☐ Loyola Notre Dame

☐ Middlebury College

☐ Mount Holyoke College

☐ Phillips Exeter Academy

☐ Rochester

☐ Saint Anselm College

1,750,000

1,500,000

1,250,000

1,000,000

750,000

Title-Set Count

DU: Oceania (South Seas)
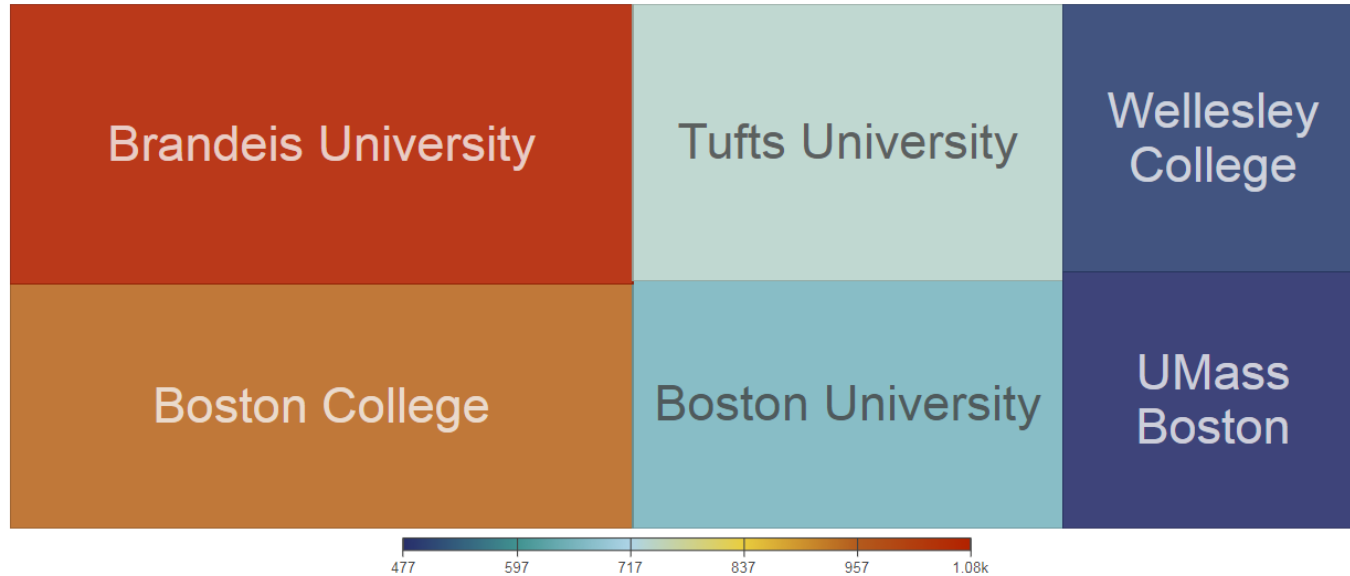
The type of chart above is called a "treemap". Treemaps are useful for displaying large amounts of hierarchically structured information. This treemap uses rectangles that are sized and ordered by the number of title-holdings in the group. Color also represents quantity, with a gradient from red representing the high, yellow near the average and blue at the low end. The first view shows all title-holdings by LC Class. Click on an LC Class and you will see the breakdown of related LC sub-classes. Click on an LC sub-class to see the breakdown of individual library holdings. Very often the largest library in the group will appear in the largest (red/left) rectangle but we encourage you to look for sub-classes where this is not the case.

THANKS!

OCLC

Leveraging EAST at Wellesley College

Karen Bohrer & Ray Schmidt

EAST Member Meeting
October 13, 2017

Case 1:
Curating a branch library's collection

Relying on EAST to curate a branch library's collection

Wellesley is renovating its Science Center which includes a branch library housing approximately 85,000 items.

There will be space for no more than 2,000 items in the renovated facility.

Science Library, 1978   Wellesley College Archives

Our plan

▸ Absorb a portion of the collection into the main library (no more than 25,000 items)

▸ Send a portion to remote storage (space and cost issues)

▸ Purge the rest

  ◦ Of course, those books that Wellesley has committed to retain will go to the main library or to accessible storage.

Our message

‣ Students and faculty will continue to have access to the content currently housed in the Science Library.

The critical role of EAST

‣ Wellesley's participation in EAST has made communicating with faculty far easier. They are reassured that they will have access to print books that we decide to purge.

‣ Librarians can use GreenGlass to more easily identify candidates for weeding since it has local data as well as the holdings of other libraries.

Case 2:
Conducting an inventory

Using GreenGlass to generate an inventory list

- Background: previous main library stacks inventory studies (10% sample of entire collection, high-circulating items, DVDs)

- Spring-Summer 2017: conducted an inventory of unique holdings using a list of volumes generated in GreenGlass

Creating and refining the inventory list

- Filters:
  - Clapp Library
  - Same edition
  - US holdings fewer than 2

- Exported spreadsheet of 1,930 volumes (1,520 titles)

- Narrowed down by excluding 231 preservation photocopies

Creating and refining the inventory list

Results

- 6 missing that are committed for retention in EAST
- 2 missing that are not committed for retention (out of scope for EAST cohort 1)
- 2 requiring further investigation (apparently journal analytics)
- Missing volumes will be replaced or reported to EAST this fall

Conclusion

▸ Future availability of EAST's GreenGlass data and functionality?

Thank you!

Dzintra Lacis
Brandeis University

Eastern Academic Scholars Trust (EAST)

Implications for Interlibrary Loan

Brandeis
Library

Dzintra Lacis
Oct 13, 2017

Introduction

Resource sharing and collections are changing

EAST – Access

Interlibrary Loan Best Practices and Workflows

Lost and damaged books

RapidILL and RapidR

What next? Conclusion

EAST

Some 6 million monographs have already been identified for retention by the EAST project, and a serials validation study is coming soon.

The EAST shared print collection is a distributed collection

EAST has 60 member libraries ranging from New England to Florida

Access

Materials must be available for circulation to other EAST libraries

EAST lending network-

Interlibrary loan services are the means by which library patrons can obtain loans or scans of materials that are no longer held locally.

Best Practices

https://eastlibraries.org/access

Main points:

Fees – so far no libraries are charging others

Loan periods – 8 weeks

Loans may be Library Use Only – based on condition or rarity

Packaging – take care to protect the contents

Shipping – expedited, and trackable if possible

Scanning – digital delivery is preferred. Scan in color when present and OCR

ILL workflow

Lending:

We can easily identify requests from other EAST libraries
We can check if an item is a retention item, the statement "Committed to Retain" is visible in our discovery system
Scan and delivery digitally where possible
Don't arbitrarily cancel requests from EAST libraries.

Borrowing:

Create an EAST custom holdings group to streamline ordering
Book chapters are a good way to share content

Lost books and damaged books

ILL staff will send an invoice to the borrowing library for lost or damaged items

When replacing a lost or damaged item with EAST retention commitments, refer to the document "Operating Procedure: Replacing Lost or Damaged Items with Retention Commitments" on the EAST website

RapidILL and RapidR

Rapid is known for fast, streamlined borrowing and lending

There is a Rapid pod for EAST members, although participation is not compulsory

Rapid participants can share articles, book chapters and books

Book chapters are an ideal way to share content from retention items

As EAST takes on serials retention, with Rapid we already have infrastructure in place for fast and efficient sharing of articles

Conclusion

Resource sharing and collections are evolving - increasing reliance on shared print collections

As EAST member libraries begin to weed their collections around EAST retention items, sharing between EAST libraries will become more important

More interlibrary loan requests will be filled through scanning and digital delivery

Interlibrary loan is essential to the functioning of a shared print repository!

Mischief Managed

EAST and Collection Management at the River Campus Libraries

Created with Haiku Deck

In Brief

- Introduction
- Integrating EAST Data
- Early Projects
- Next Steps
- Questions and Answers

Introduction

What the Data Said.

When EAST met the Annex

EAST-Empowered Decision Making

Special Thanks to Sara Amato

Next Steps

Thank you!

Any questions?

EAST: Leveraging Monograph Commitments

Oct 13, 2017

UMassAmherst
The Commonwealth's Flagship Campus

Overview

- The UMass Amherst Libraries are EAST retention partners for monographs and serials

- After monograph retention commitments were entered into our ILS, we developed replacement and withdrawal workflows around these retentions

- Those workflows help us determine when we can leverage our EAST monograph commitments when withdrawing and replacing materials

- Additionally, we found that we can use the EAST retention database for vetting gifts and determining what we might not want to add to our collection
  - https://east-retention-db.appspot.com/

Replacement Workflow part 1

- When an item has an EAST commitment
  - If we have another copy, the other copy will be retained for EAST
  - If we can locate a suitable replacement, we order a replacement copy
  - In both cases, we withdraw the EAST commitment from the item record
  - We add an EAST retention note to the other copy or replacement book
    - 583 field note; EAST replacement copy [date, initials]

Replacement Workflow part 2

- If we cannot find a suitable replacement copy
  - Add WDN to item status
  - Add an internal note to the withdrawn item record: EAST withdrawn [date, initials]
  - Search the Five Colleges catalog to see if there is another copy in the Valley and if so
    - Check the EAST Retention Database (https://east-retention-db.appspot.com/) to see if the other library already has a commitment
  - Contact the other library (or repository) to see if they will take over the commitment
  - Report to Sara Amato
    - We cannot replace a commitment OR
    - Another library (or repository) will take over the commitment
  - Problem: We only retain one copy in the Valley

Example: Vetting a Request part 1

A librarian from another EAST monographs retention partner reached out to one of our librarian:

- I am looking to do some weeding of Baker's Biographical Dictionary.

- UMass has many (but not all of the editions) and have been assigned EAST: Commitment for many of the editions, but not the ones I cite below.

- I feel that I can at least weed the volumes that UMass has committed to keep,

- QUESTION: Would you like to consolidate all the editions of Baker's at UMass? These have no East Commitment (I don't know what their thoughts were on this) but I can offer you:

- 2nd ed., 1905; 3rd ed., 1919; 1949

- BTW, no one else in the Five Colleges has dealt with this issue, and have just kept their editions.

Our librarian suggested that we acquire and retain all editions as EAST commitments.

Example: Vetting a Request part 2

Review of EAST Retention Database showed 12 (unique) retentions throughout the region, and those included the volumes we were being asked to accept.

- Connecticut College – 1 copy

- Trinity College – 3 copies

- Wesleyan University – 1 copy

- UMass Amherst – 4 copies

- Swarthmore College – 2 copies

- Boston University – 1 copy

Response: We can certainly accept these 3 volumes that we do not own. However, we would not place an EAST retention against them as all 3 volumes have retention commitments with other EAST libraries. One parameter of the EAST program it to spread retention out over a diverse geographical area.

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The Commonwealth's Flagship Campus

Thank you.

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EAST EASTERN ACADEMIC SCHOLARS' TRUST