

# Analysis and Visualization for a Regional Shared Serials & Journals Program

**A**s libraries scale down their legacy print collections, they also must ensure the content remains accessible to their users, even if it's not shelved locally.

Having already agreed to retain, protect, and make accessible approximately 6 million print monograph titles, the Eastern Academic Scholars' Trust (EAST) embarked on a project with 32 of our 61 members to protect print serial and journals titles.

Unlike our monographs work, EAST had no grant funds, making the search for a solution more difficult. This led us to beta partner with CRL in their Collection Comparison Service.

**Being a Beta Partner**

*Working as a beta partner with CRL has been rewarding and meant EAST was able to forge new ground in shared print, but it didn't come without its challenges. Realizing mistakes and redoing work is intrinsic to beta testing; for example, there was more data cleanup than anticipated & manual review of reports.*



**Acknowledgements & More Information**

CRL, EAST Project Team, Working Group members, and staff at participating libraries  
[www.eastlibraries.org](http://www.eastlibraries.org)

## Planning & Tools

**Steps we took explore this further:**

Environmental scan of other shared print program's approaches to serial and journal retention  
 Surveyed EAST membership to identify their retention & withdrawal priorities

Formed a Serials & Journals Working Group of member experts

**Initial decisions:**

Take a fresh approach to serials & journals retention, not replicating commitments made by other programs  
 Focus on holdings levels within EAST to identify both rare and widely-held titles

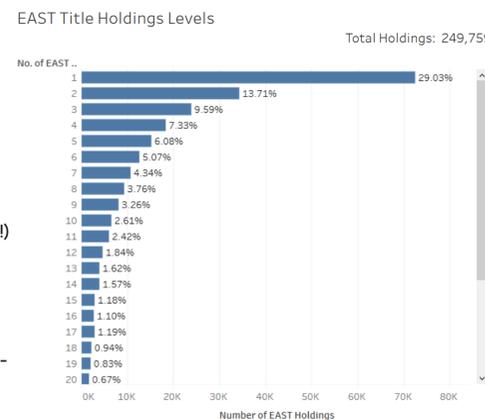
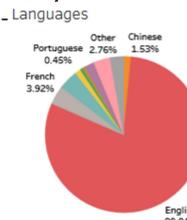
**Collection comparison support:**

Contracted with Center for Research Libraries (CRL) who had in development a beta collection comparison service which was very affordable. Worked with CRL on agreeing the data that would allow us to make retention decisions including:

- Commitments from other shared print programs
- Holdings levels & depth
- Language
- LC class
- Publication yrs
- OCLC holdings overlap
- Work family info
- JSTOR availability

**Visualizing the collective collection:**

CRL provided the group data back to us in a massive (and overwhelming!) spreadsheet. We plugged this data into Tableau, which allowed us to better visualize the 114,000 distinct titles, and apply filters to divide the collective collection into more manageable chunks, based on holdings ranges within our group.



## Analysis & Decisions

**Medium Rare" titles**

Initial focus titles held by 4-6 participating libraries (labelled "medium rare"), which we felt were most at risk of being lost from the collective collection as libraries move on from withdrawing more widely-held titles to titles that aren't considered rare or common enough to be considered ubiquitous. With approximately 10,000 titles in this category also made for a manageable group to start with.

**"Widely-held" titles:**

Considered next a group of approximately 700 titles that are more widely-held in our group (7-28 participating libraries, no titles were held by more than 28). Commitments in this category have provided greater withdrawal opportunities and potential space savings, a priority for many of our libraries.

**Retention Model:**

For both categories we developed a retention model with 3 main parts:

- Retain up to 3 holdings of titles
- Exclude JSTOR titles and titles already being retained by members of the Rosemont Shared Print Alliance. Also, misc. categories not considered in-scope (e.g. newspapers & non-print format)
- 3 libraries with deepest runs of a title allocated retention responsibility

**"Scarcely-held" titles**

Currently working on developing retention rules for the approximately 96k titles held by 1-3 EAST libraries. We are looking at incorporating additional factors into our retention rules like OCLC holdings levels and subjects that would allow us to filter to a group of "retention worthy" titles.



## Successes

**19,000 title-holdings committed to retain** is a significant amount of titles to have protected and remain accessible to our members and the wider library community.

**Phased approach** made for a less daunting set of analyses & allowed us to consider different retention rules depending on the holding levels. With the phases back to back we could build a sense of momentum and keep participants engaged.

**Tableau was vital in our success**, especially the real time filtering of the collection data, which made for a more seamless process and less spreadsheet wrangling. Tableau was also affordable and a relatively easy to use solution.

**Data clean up**, as part of the analysis CRL performed data remediation work to correct OCLC & ISSN #s. Also, libraries as part of their shelf checks flagged anomalies and corrected their ILS holdings data.

## Challenges

**Errors & inconsistencies in ILS data** from a variety of libraries made it difficult to compare apples with apples and rely on when allocating retention responsibilities. We tried to not let perfection get in the way of making progress.

**Retention fatigue** is something we are having to face, particularly at libraries where in addition to the actual commitments to retain material for our 15-year retention period, there's been a lot of data reviews and clean up required in ILSs.

**Differing priorities in our diverse group**, the need for scarce titles to receive retention commitments splits member opinion. While some members feel the perceived scarcity of these titles warrants protection from potential loss, others feel formal commitments aren't necessary as libraries would generally keep this material regardless.

**Documentation for members:** we were so focused on keeping the momentum going and agreeing retention rules it was hard to take a step back to identify where we might be lacking guidance.