

EAST Membership Update Webinars – May, 2017

Monday, May 8th: 11:00am-12:00pm
Wednesday, May 10th: 9:00am-10:00am
Thursday, May 11th: 10:00am-11:00am



BOSTON LIBRARY CONSORTIUM



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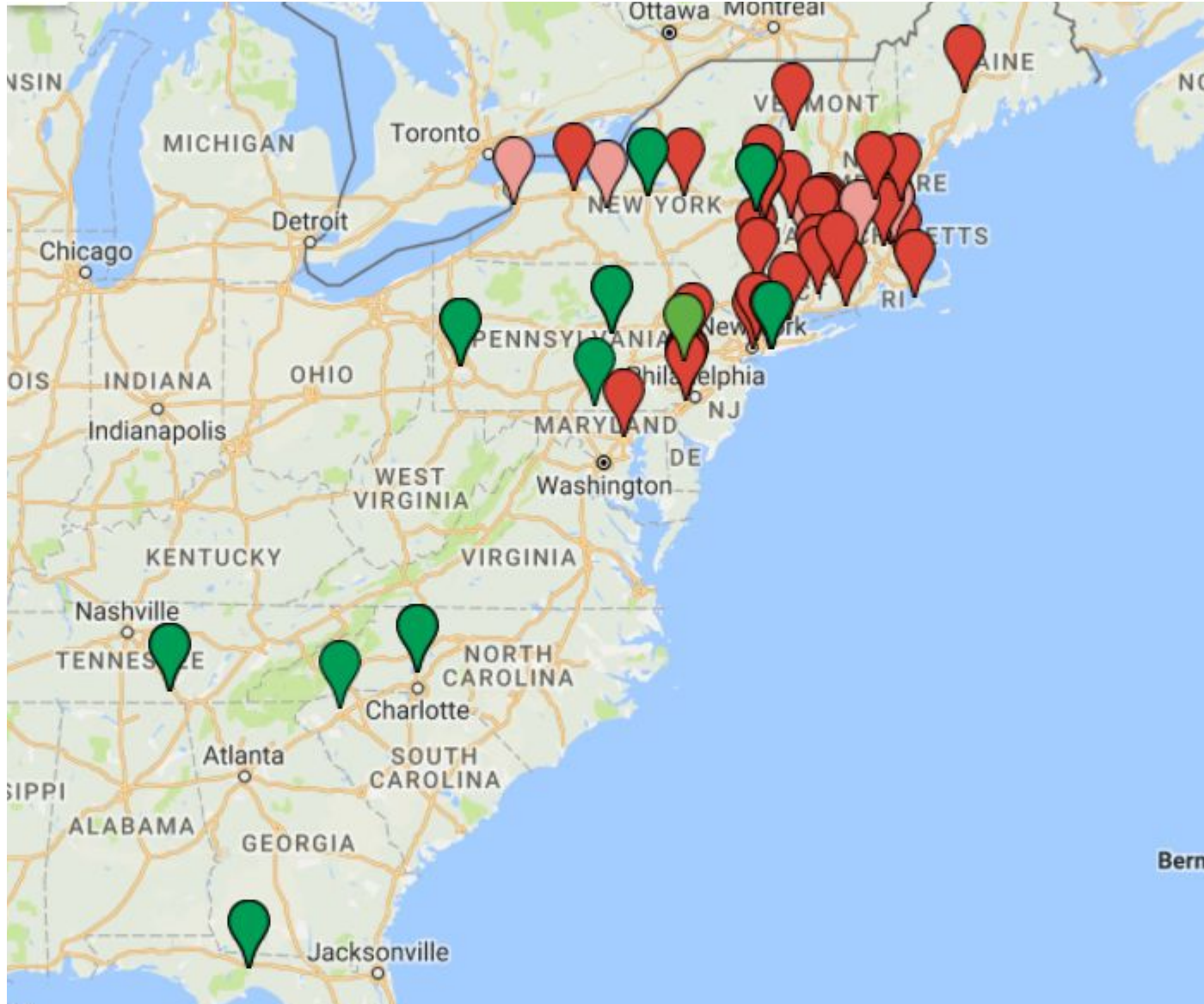
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Our Agenda

- General EAST Update – Susan Stearns, Project Director
- Retentions Update – Sara Amato, Data Librarian
- ILL and EAST Rapid POD Update – Susan Stearns
- Serials/Journals Working Group Update – Matthew Revitt, Shared Print Consultant



Mei Mendez
EAST Project Manager



The **new** map of the Eastern Academic Scholars' Trust – 59 institutions in 11 states from Maine to Florida
Cohort 2 libraries shown in **green**

General EAST Update

Cohort 2 (13 libraries)

- Bucknell University
- Davidson College
- DeSales University
- Florida State University
- Furman University
- Gettysburg College
- Hofstra University
- New York University
- University of Pittsburgh
- Syracuse University
- Union College
- University of the South
- Villanova – Supporting Partner

Anticipated Timeline

- June, 2017 – Kickoff
- Mid August, 2017 – Data extracts to SCS
- Mid-October through mid-December – Validation sample study
- Mid-October through early December – retention modeling
- January, 2018 – Retention model finalized
- February/March, 2018 – Finalized retention commitments in GreenGlass

Extension of Mellon funding

- The Andrew W. Mellon Foundation has approved a no-cost extension of its funding for EAST through June of 2018
- Allows us to move forward with Cohort 2 with full staffing
- Replication of the Validation Sample Study done with Cohort 2
- Continued work on collaboration with other shared print programs and longer term sustainability of EAST
- Summit in Spring, 2018
- Further details at <https://eastlibraries.org/special-highlights/east-no-cost-extension-mellon-grant-approved>



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Continued outreach

- ALA Midwinter meeting with representatives from other shared print for early collaboration discussions – will be expanded at Annual
- Presentation on EAST retention model as part of ALCTS Exchange online conference – May 9
- Panel with HathiTrust, and directors from Wesleyan and Brandeis at ACRL New England – May 12
- Presentation on validation sampling at Print Archive Network session at ALA Annual
- Panel at ALA Annual in June

Governance update

- Thanks to Interim Operations Committee
- Voting on formal OC will be announced quite soon
- Executive Committee – terms which expire in fall, 2017 will be opened for nomination with elections in the fall
- New Monograph Working Group and Validation Working Group for Cohort 2 collection analysis to be formed this summer

Communications

- East Members listserv – east.members@list.unh.edu
 - General communications from the EAST Project Team
 - Open listserv for members to share information, questions, postings, etc.
- Operations Google group - groups.google.com/a/blc.org/d/forum/east-operations
 - Discussion of operational issues as they relate to materials retained for EAST
 - Membership to this group is optional and open to all
 - The group is not moderated though EAST staff are on the list



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Retentions Update



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OCLC/WorldCat - Registration & Discovery of EAST Commitments

- OCLC release date of Shared Print product delayed - now projecting mid Summer - Fall
- ELMS College is involved in the pilot testing of this product
- Continuing to work with with OCLC on the pricing model

Retentions FAQ

The Operations Committee has been working on refining the Retentions FAQ, available on the eastlibraries.org website:

<https://eastlibraries.org/frequently-asked-questions-about-retention-commitments>

Please consult this FAQ when questions arise.

Something unclear? Let us know!!!

Validation Study - Deeper Dive into the Data Retention Requests

- ~70,000 titles 'at risk' of being missing or in poor condition with surplus copies in EAST.
- Request sent in March with lists of titles
 - Item level locations and barcodes available
- 15 libraries have responded
- If your library has not yet responded you will be hearing from us soon!

Reallocation Requests

Help! We've:

- lost a book
- found mold
- had water damage

....



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Reallocation Requests - 2018 / 2019

Reallocation requests made prior to December 2017, any titles available in the EAST Cohort 2 libraries will be reassigned there.

For 2018, EAST will follow a semi-annual schedule of retention reallocations.

Process reevaluated in 2019 for sustainability/functionality

At any time during the calendar year

May 1st Nov 1st

June 1st - 15th Dec 1st - 15th

June 15th - July 31st Dec 15th - Jan 31st

August 1st Feb 1st

Requests for reallocation may be submitted at any time by providing the [EAST Project Team](#) with a list of OCLC numbers.

EAST Project Team reminds member libraries of June/December 1st deadline to submit reallocation requests.

EAST staff determines which titles have surplus copies in EAST for potential reallocation.

[Operational Contacts](#) at EAST libraries holding surplus copies are provided lists of potential additional retention requests. Libraries have 6 weeks to examine the lists and respond if they are able to take on the additional retentions. Libraries are then responsible for recording retention commitments on these titles in their ILS and WorldCat (when available). The EAST Project Team will update the EAST Retention Database.

Libraries who submitted requests for retention reallocation are informed of the results.

Gather User Stories: Uses of GreenGlass



What have you been up to?

Your cohort libraries want to know!

Any advice for cohort2?
Any data presentations
you wish you had had?



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ILL and EAST Rapid POD Update

EAST Lending Network

- Thanks to ILL Working Group for development of Best Practices for Inter-Library Loan -
https://eastlibraries.org/sites/default/files/BLC_Uploads/BestPracticesforEASTILL_ECapproved20170127-WithLOGO.pdf
- Extend borrowing privileges as broadly as possible rather than limiting lending to materials retained for EAST
- Provide prompt service and shipping to other EAST institutions

More on EAST and ILL

- EAST resource sharing libraries are included in the OCLC Policy Directory.
- An EAST OCLC Group Access Capability (GAC) has been created. Consult the [list of OCLC and DOCLINE symbols](#) for a list of symbols included in the EAST GAC (these lists available on the EAST website – www.eastlibraries.org on the Access page under Inter-Library Loan

Rapid Pod now available

- EAST Rapid Pod
 - Articles, book chapters and Returnables (if using RapidR)
 - Libraries configured initially – Boston College, Bryn Mawr, Hamilton, Middlebury, Tufts University, University of Connecticut, UMass – Boston and Williams College
 - To join or for more information on RapidR and costs, contact Mike Richins at Rapid mike.richins@colostate.edu



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Serials/Journals Working Group Update

Serials & Journals Working Group Update

- EAST's primary focus is the retention & preservation of print monographs, but developing a strategy for serial & journal titles is a priority for many members.
- No grant funding to support serial and journal work, so not on scale of programs like WEST.
- Fall of 2016 gathered information on current landscape of withdrawals and retention within EAST group and feedback on what EAST's approach to serial and journals should be.

Serial & Journal Retention Partners

- Amherst College
- Boston College
- Boston University
- Brandeis University
- Connecticut College
- Elms College
- Fairfield University
- Five Colleges, Incorporated
- Hamilton College
- Lafayette College
- Loyola Notre Dame
- MBLWHOI
- Mount Holyoke College
- Siena College
- Smith College
- Swarthmore College
- Trinity College
- Tufts University
- Union College
- University of Massachusetts Amherst
- Williams College



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Serials & Journals Working Group Charge

- Working Group formed in December 2016 which is tasked with making recommendations to the Executive Committee regarding:
 - Scope of collection analysis for serials and journals
 - Retention selection criteria
 - How the collection analysis will happen
 - How retention will be assigned/allocated
 - How commitments will be disclosed
 - Identify additional operating policies and procedures documentation



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Serials & Journals Working Group Roster

- **Palash Bosgang**, Bard College
- **Martha Gunnarson**, Worcester Polytechnic Institute
- **Melodie Hamilton**, Connecticut College
- **Sally Krash**, UMass Amherst
- **Missy Laytham**, Loyola Notre Dame Library
- **Kathleen Norton**, Mount Holyoke College
- **Nina Peri**, Fairfield University
- **Matthew Person**, MBLWHOI
- **Peggy Seiden**, Swarthmore College
- **Steve Smith**, Boston University
- **Barbara Swetman**, Hamilton College
- **Sally Wyman**, Boston College

Project Team members:

- **Matthew Revitt (Chair)** **Sara Amato**
- **Mei Mendez** **Susan Stearns**



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Progress to Date

- Looked at different examples of approaches to print retention (and the pros and cons of each) and factors which impact on retention like:
 - Holdings levels (both at the group level and across OCLC)
 - Digital availability
 - Preservation by trusted repositories like JSTOR and CLOCKS
 - Retention commitments from other shared print programs like WEST and regional repositories like the Five Colleges.

Progress to Date

X Started with sample of 50 rarely held titles. However, clear that most titles in this category are not appropriate for EAST retention:

- Government documents
- Reference resources
- Small society/organization newsletters
- In-house publications
- Most are a single volume and in special collections

✓ Instead now looking at widely held titles that are likely to be at most risk of withdrawal. This approach should provide greater withdrawal opportunities and much needed space savings.

Collection Analysis Support

- The Project Team investigated data support available for collection analysis support, including Center for Research Libraries and OCLC Sustainable Collection Services.
- March 2017, the Executive Committee approved the use of member monies to contract with CRL whose data reports will help with some of the hard lifting of analyzing journal and serials.
- Agreement between EAST and CRL finalized in late April.
- Files libraries send to RapidILL provide the easiest, most complete, and least expensive, data set for collection analysis. Libraries' operations contacts have been asked to submit this data by **May 26, 2017**.



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Next Steps

- The Working Group will use CRL's data reports to develop draft criteria for which categories of titles will be retained. The criteria will be shared with the Serial & Journal Retention Partners' operational contact and voting member for comment.
- Final retention recommendations will be submitted to the Executive Committee for approval.
- Serial & Journal Retention Partners will be provided with retention proposals and have a window of opportunity to review before signing off on the retention commitments.
- Serial & Journal Retention Partners will be expected to record the commitments in their local ILS.



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Thank you.

Q & A



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