Onboarding Webinar for New Staff at EAST Member Libraries

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The EAST Project Team

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What is Shared Print?

Shared Print and Shared Print Programs are collaborations among libraries and groups of libraries to distribute the responsibility for protecting and preserving print collections, allowing partner libraries to repurpose library space while making available the program’s collective collection to local faculty, students and scholars.

By working together, libraries can collect and maintain curated sets of print books and journals which are broadly useful and make them collectively available to readers.

Over 23 million books retained!
That's around 3,276 miles of books which would reach from Maine to California.

What is Shared Print Infographic
The EAST Mission

Securing the scholarly record in support of teaching, learning and research

Goals: Maximize retention commitments and facilitate access
Some EAST Definitions:

**Retention Partners:** Dues paying member institutions who agree to keep and provide access to titles they were allocated to retain during their collection analysis process.

**Supporting Partners:** Dues paying member institutions who support and value the work of EAST but cannot commit to retain titles; they are represented in EAST’s governance.

**Retained/Retention Commitments:** Titles libraries agree to keep on and loan (or otherwise provide access to) in order to preserve the scholarly record.

**Disclosure/Registration:** The act of updating the records of retained titles by incorporating a “Committed to Retain” note in the MARC 583 field. This is done in the institution’s ILS, in OCLC, and in PAPR (for serials/journals retentions) and facilitates discovery of shared print retentions.
82 Members in 13 States

77 Retention Partners and 5 Supporting Partners

32 Serials and Journals Partners

Almost 10 million monographs currently retained

Over 29,000 serials and journals currently retained

Retention commitments registered in WorldCat and the PAPR databases

Member of the Rosemont Shared Print Alliance

Founding member of the Partnership for Shared Book Collections
The EAST Business Model

EAST member libraries pay an annual membership fee based on collection size (at the time of joining).

In addition to the annual operating budget, EAST maintains a reserve fund to facilitate subsidy of collection analysis work and support special projects approved by the membership.

The Boston Library Consortium is EAST’s fiscal agent providing financial services support and an administrative “home”. The BLC is a 501 c3 incorporated in Massachusetts.

EAST staff work virtually with the Project Director who reports to the EAST Executive Committee.
Monographs Collection Analysis and Retention Model

Libraries joining EAST carry out a collection analysis using one of two tools: GreenGlass (from OCLC) or Gold Rush (from the Colorado Alliance of Research Libraries). The first 60 libraries to join EAST used GreenGlass; since then some new members have preferred to use Gold Rush for their collection analysis.

During this process, libraries:

– Load their MARC records into the tools (can include only circulating collections/locations).

– Compare their local records to the EAST collective collection of retention commitments to determine uniqueness and overlap resulting in a retention model for the library’s collection.

– Review an initial allocations list that includes the titles they are asked to retain and finalize their local retention commitments.

– Register commitments in the appropriate data bases.
The retention model has evolved to reflect the size of EAST and to take into consideration the results of our validation sampling with Cohorts 1 and 2. The basic model is as follows, adapted to the tool libraries choose to use:

- Retain all scarcely held – includes unique titles and those with limited holdings in WorldCat (if comparison with WorldCat is feasible)
- Retain up to 5 of frequently used – based on aggregation of usage for Cohorts 1 and 2
- Retain an additional copy of titles published pre-1900 (based on validation research on condition)
- Excluding “ephemera” and limited to titles published prior to 2011
Serials and Journals

- Thirty-two of the EAST members are Serials and Journals Retention Partners. Two only retain serials titles.
- The journal collection analysis was carried out with the support of the Center for Research Libraries, which worked with the EAST Project Team to develop a phased methodology to identify titles held by 4-6 participating libraries, then 7-28, and lastly, titles held by 3 or fewer libraries. This work yielded ~27K retained titles.
- Subsequent participation on the Rosemont Last Known Copy Initiative have increased this number to 29,423.

Details of this work can be found in the EAST Serials & Journals Collection Analysis and Retention Modeling 2016-2019 document.
All of EAST’s collection analysis and retention work is guided by the EAST Memorandum of Understanding (MOU) which is signed by all member libraries.

Also on the eastlibraries.org website:

- General Governance Policies
- EAST Members’ Rights and Responsibilities
- Major Operating Policies
  - Supplemented by documentation on replacing retention commitments for lost, missing or damaged items and Best Practices for Inter-Library Loan
  - Includes an FAQ on common questions relating to retention commitments
EAST Governance: Your Opportunity

Executive Committee (EC)
- Primary governing body
- Elected by the membership
- Representative by type and size of library
- Three year term

Operations Committee (OC)
- Charged with addressing issues relating to operationalizing EAST policies
- Elected by the membership
- Representative by type and size of library
- Two year term

• Working Groups – Ad hoc representative groups focused on specific aspects of a project – e.g. Serials/Journals Working Group, ILL Working Group
Recording Retentions in 583 field

Shared Print Programs use the 583 field to record retentions.

583 1b |a committed to retain |c 20160630 |d 20310630 |f EAST
    |u http://eastlibraries.org/retained-materials |5 MeWC

ILS-specific instructions on the EAST 583 Working Group website.
Make sure you know where to find commitments in your local ILS.
Shared Print in OCLC

OCLC SHARED PRINT SOLUTIONS
Functionality across services

WorldShare® Record Manager

Edit Shared Print commitment

Webinars on ways to register
Shared Print and Working with
Shared Print in OCLC

https://help.oclc.org/Metadata_Services/Shared_Print

EAST
EASTERN ACADEMIC
SCHOLARS' TRUST
Finding EAST Commitments

Monograph Commitments:

**OCLC** - Connexion, Record/Collection Manager, FirstSearch and various APIs. See "Functionality across services" doc.

**Searchbox** available from the homepage of eastlibraries.org - Data pulls from the OCLC API.

**Gold Rush** - contact Mei Mendez (mmendez@blc.org) if you need a login. Data is updated yearly. Serials will be added.

**GreenGlass** - If your library maintains a subscription you can search EAST retention commitments in GreenGlass. Data is updated regularly.

Serials Commitments:

**Print Archives Preservation Registry (PAPR)** - regularly synced with OCLC.

Note that PAPR also hosts a Collection Comparison Tool which allows for an upload of a list of local record numbers to generate an instant comparison with the PAPR archived titles registry.
Reallocation Process

Twice yearly call for libraries to request reallocation of retained titles that can no longer be retained (because they are out of scope - in which case the retention is removed and not reallocated,- due to loss, change in lending status, etc).

Once a year, EAST Data Librarian Sara Amato sends out to the libraries the lists of titles that have been requested for reallocation and which are held (but not retained) at other EAST libraries.

Libraries then let us know if they can retain those new titles and update their ILS and WorldCat accordingly. These changes would also be reflected in the annual Gold Rush data update request.

FORM for reporting Out of Scope and Reallocation Requests
Resource Sharing through EAST

EAST Lending Network

**ILL Best Practices:**

- Most libraries lend at no charge
- Rapid EAST pod - for Rapid ILL and Rapid Returnables
- EAST OCLC GAC

ILL representation on the EAST Operations Committee

Looking into how to further enable and encourage discovery and access to the EAST “collective collection”
17 Member Programs across 42 states and provinces representing 359 participating libraries

Coordinating collaboration for the protection of print books
A venue for sharing expertise, research, advocacy and work at scale
Focus on making shared print equitable, responsible, and sustainable

https://sharedprint.org/
From 2.3 million monographs retained in 2011 to 46.8 million in 2021
An increase of over 2,000%
Primary Services of the Partnership

- Best practices
- Marketing/communications
- Shared print efficiencies
- Research into issues of importance to shared print
- Resource sharing

See https://sharedprint.org/ for more details
Current Best Practices

- Collection Scope of Shared Collections
- Digital Surrogates
- Disclosure of Items in Local Systems
- Exiting a Shared Print Program
- Facsimiles
- Inventory
- Memorandum of Understanding (MOUs)
- Preservation in a Shared Print Program
- Program Assessment
- Resource Sharing & Access
- Retention Period and Survivability
- Scarce Copies
- Shared Print Education and Awareness
- Sharing Metadata & Records
- Storage Environment
- Transferring Commitments or Materials
What is Shared Print?

Shared Print programs are collaborations among libraries to distribute the responsibility for maintaining collections, allowing partner libraries to reserve valuable space for materials that aren’t available electronically, or for print items that are in high demand.

- Over 23 million books retained!
- That’s around 3.27M miles of books which would reach from Maine to California.

More Space for You

Sharing print copies between libraries means more space in libraries for other uses like meetings and technology.

It’s not just books. Libraries are preserving and sharing journals and magazines too.

Over 100,000 retained!

Shared Print Creates a Collective Collection

Collective collections combine the resources of libraries, creating more content for users to explore.

Keeping the Print

In an age of digital materials, shared print programs make a critical role in ensuring that materials are maintained.

References

Read more about “Collective Collections” in Wikipedia.
Current and Future Partnership Initiatives

- Shared Print Toolkit
- Risk research on optimal number of copies to retain
- Pilot research project with OCLC to investigate shared print holdings by subject area
- How can shared print provide a further safety net should member libraries be unable to continue to commit to retentions?
- Continued advocacy on the value of shared print through communications efforts and ROI tools
Formed in 2015, as a collaboration of regional programs interested in coordinating their efforts on a larger scale to ensure the retention of and access to print journal backfiles.

https://www.rosemontsharedprintalliance.org/
Impact of Rosemont on EAST - Retention

- Reduce retention commitments for our members by excluding titles already committed by fellow Rosemont participating libraries
- Reciprocal retention agreement:
  “whereby all participants in the Rosemont Alliance agree and affirm that all holdings retained by their respective programs are also retained under the Rosemont Shared Print Alliance and, by definition, subject to the Rosemont shared policies or guidelines, including the Access Principles”
Impact of Rosemont on EAST - Access

• Guaranteed access to over 188,000 titles retained by fellow Rosemont libraries

  “Participants agree to make Rosemont Alliance archived materials available to other Rosemont members. Archived material is eligible for lending to institutions outside of the Alliance per the holding library’s lending relationships and policies.”

• Last Copy Agreement to provide guidance to libraries about what to do when a last or scarcely held backfile is detected in a collection
Impact of Rosemont on EAST - Advocacy, Shared Expertise & Tools

• Advocacy with OCLC & CRL on registration service for journal commitments & collection analysis tools
• Shared expertise e.g. recording commitments in ILS
• Communicating the value of shared print
• Access to online JRNL journal gap filling tool (cost covered by EAST)
• Supporting the development of the PAPR Collection Comparison Tool & providing comparison with GreenGlass tool https://www.rosmontsharedprintalliance.org/comparison-collection-analysis-tools
Current activities:

• Identifying and engaging with storage partner libraries
• Producing gap filling guidance
• Gathering resource sharing data
• Developing shared print communication material
• Continuing to grow collective collection
• Implementing Last Known Copy Initiative
• Rosemont Last Known Copy Initiative focused on securing EAST retention commitments on titles held by participating Rosemont libraries for which they are the only known holder of in OCLC

• 21 EAST Serial and Journal Retention Partner libraries participating

• 16 libraries have so far confirmed their commitments -- 1,239 titles in total, out of 1,465 titles originally allocated
• 21 EAST members have agreed to use the JRNL Gap Filling Tool to work with fellow Rosemont libraries on filling holding gaps in retained journal holdings
• Cost of participation being covered by EAST
• Working on setting up member accounts & appointing library reps on JRNL Oversight Committee

Contact matthew.revitt@maine.edu for further info on JRNL

https://guides.uflib.ufl.edu/JRNL
Ongoing EAST Work

- Collection analysis for new members: Mass State Library and Temple University in Gold Rush as well as a project with three members of the VIVA Consortium.
- Ongoing registration of new commitments in OCLC and PAPR
- Collaboration with the Partnership for Shared Book Collections (monographs) and the Rosemont Shared Print Alliance (serials/journals)
- Special Collections, Access, Collection Analysis, and ILL Working Groups continue their work and provide recommendations to the EAST Executive Committee.
Member Resources

On the eastlibraries.org/member-resources page, there are links to EAST policies and procedures, which are updated as the Executive Committee, Operations Committee, and the membership make changes.

On the website, you can also find the Reallocation Process webpage, as well as the Retention FAQs, and the link to our ILL Best Practices. The Reallocation Process is likely to change as EAST retentions are registered in WorldCat, but we do have a basic workflow that will be useful to know.

Reallocation
Retention FAQs
ILL Best Practices
Communications with EAST members

• EAST members email list - contact mmendez@blc.org to join
• Operational contact, voting member, and billing contact for each member library
• Quarterly member update webinars
• Annual member meeting
• Onboarding sessions as needed for new staff members
• Website: eastlibraries.org
EAST has an abundance of documentation on the website, including onboarding documentation and information geared towards the following staff groups:

- Administrators
- Collections
- Inter-Library Loan, which includes links to the ILL Best Practices
- Technical Services

*all these resources are available via eastlibraries.org/member-resources or directly at eastlibraries.org/onboarding.*
EAST Members can:

• Borrow materials from their EAST partners, in most cases at no cost

• Withdraw titles that their partners have committed to retain

• Participate in the governance of EAST

• Access and use EAST member training materials and documentation

• Engage in regular update webinars and the annual membership meeting

• Contribute to the protection of the print record through regional and national collaboration.

From the FAQ:

What does an EAST retention commitment mean?
A retention commitment means that the retaining library is committed to retain the title and provide access through June 30, 2031.* This includes replacing the title if lost or damaged.

How do I know what monographs are retained?
Retentions are recorded in your local ILS (most likely in a MARC 583 field), Gold Rush**, and OCLC’s FirstSearch.

*This date may be extended.
**Ask the Project Team for login information.

The value of EAST

“EAST offers essential assurances to our faculty that we are invested in the print record and ensuring its accessibility to current and future scholars.”

--Anna Gold, University Librarian, Worcester Polytechnic Institute
Thank you.