

Update on the Eastern Academic Scholars' Trust (EAST)

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Eastern Academic Scholars' Trust (EAST)

EAST is

- A shared print monograph retention partnership of 48 college and university libraries across the Northeastern United States
- In its implementation phase as of mid 2015 with support from the Mellon Foundation and the Davis Educational Foundation
- A partnership that is leveraging a “distributed retention model”
 - Libraries become retention partners committed to retaining and sharing designated copies of print monographs for use of the patrons of any of the libraries participating in EAST

Grants & Cost Sharing

Grants

- Mellon grant for Years 1 and 2 (\$995,000 total) to support start up and implementation
- Davis grant for Years 1 and 3 (\$400,000 total) for collection analysis (\$100,000 of this to fund 2nd cohort in year 3)

Member support

- Membership fees for Years 1 and 2 (~\$500,000 total) support program management and a portion of collection analysis costs

Core teams for EAST

EAST team

- Anna Perricci, EAST Project Manager
 - Lizanne Payne, Shared Print Consultant
 - Sara Amato, EAST Data Librarian
 - Susan Stearns, Executive Director, Boston Library Consortium
 - PIs on Mellon grant: John Unsworth (Brandeis) & Laura Wood (Tufts)
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- Executive Committee (primary governance)
 - Sustainable Collections Services (SCS)
 - Monographs Working Group
 - Validation Working Group

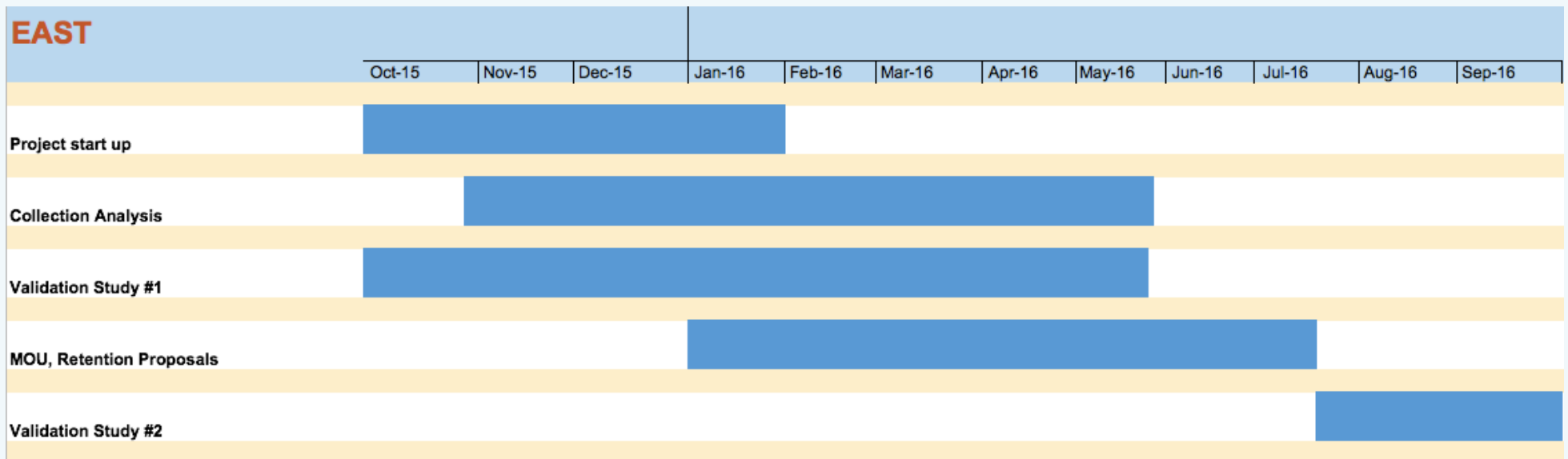
EAST has

- Stakeholders from 48 libraries, including members of other consortia and partnerships
- Submitted a large data set to SCS for collection analysis (containing over 17.5 million monographs)
- Preliminary policies drafted for a sustainable and robust shared print project

Two types of EAST partners Retention Partners & Supporting Partners

- Majority of libraries in EAST are Retention Partners participating in monograph collection analysis and will commit to retain specific titles in their local collections
- Six libraries have chosen to join as Supporting Partners (collection analysis optional)
- Both Retention Partners and Supporting Partners pay an annual membership fee
- Retention Partners as well as any Supporting Partners who chose the collection analysis option also pay a modest contribution to offset the costs of this service (largely covered by grant funds)

Timeline



Major Project Activities

- Analyze circulating monograph collections in order to propose commitments to be made by retention partners
- Design, test and analyze a sample-based validation study
- Secure retention commitments
- Finalize EAST policies
- Plan for future EAST membership
- Explore relationships with other regional and national shared print programs

By summer 2016 **EAST** will complete

- Collection analysis project including **17,683,758 monographs** and form retention proposals for EAST retention partners' consideration
- A policy review to develop a MOU for a sustainable and robust shared print project including policies for resource sharing
- A validation study to confirm the presence and get a very quick condition assessment of a random sample of 6,000 volumes from each of the 40 EAST **Retention Partner** libraries

Using GreenGlass

Collection Analysis Participants

1. New collection analysis participants (34 libraries)
 - Data work will start from scratch
 - Bib, item, and circulation extracts
2. Recent SCS clients (5 libraries)
 - Data is less than two years old
 - Original data will be used, but re-scoped
3. Older SCS Group projects (MSCS, ConnectNY)
 - Data is more than two years old
 - Retention commitments can be used as targets *



Group features in GreenGlass

GreenGlass employs **data visualizations and modeling tools** to enable groups of libraries to:

- understand their shared collection in terms of overlap, subject dispersion, and usage.
- experiment with various retention scenarios, and estimate the impact on each participant library.
- commit to specific retention agreements, with confidence in the outcome.



Monographs Working Group

- 15 members including liaison to Executive Committee
- The Monographs Working Group makes recommendations to Executive Committee regarding selection criteria for retention proposals, services among EAST members & policies
 - Collection analysis and selection criteria for retention proposals
 - Review and recommendation of services and policies
- Two decisions made: comparator groups and special category flag for use in GreenGlass

Validation Working Group

- 11 members including liaison to Executive Committee
- Charge: make recommendations to the Executive Committee regarding the validation sampling studies that will inform EAST retention proposals
- Review and advise about the design and training materials developed for the studies & consider how the validation study results should affect retention proposals
- Study #1: Estimate the statistical likelihood that library holdings actually exist on the shelves
- Study #2: Test to see whether redundancy has an effect on the condition or existence of titles

Validation Sample Study #1

- Each Retention Partner's collection will be sampled to determine the local likelihood that an item in the catalog is on the shelf
- This study will be based on a random sample of all volumes in a given Retention Partner's collection, not just the volumes likely to be the subject of EAST retention commitments
- The resulting data should inform EAST working groups and teams for policies, MOU & retention proposals
 - Help to establish a common metric of reliability
 - Help to determine what levels of redundancy make sense in consortial retention arrangements
 - Suggest whether variability with other criteria apply

EAST Validation Study My Prototype

CHECK SHELVES

Check the shelves to verify the presence of an item.

0 Items In Process [Clear](#)

VERIFY MISSING

Confirm Status of Missing Volumes

CURRENT STATS

6000 volumes are on your list, 135 of which have been checked.

105 have been found on shelf
30 have been recorded as missing
At this rate you will find **77.0%** on shelf.
(*Juvenile: 50.0% ; Stacks: 44.4% ;*)

Percentage remaining to be checked, by location:

Juvenile 385 (89.0%) remaining out of 431

Stacks 5560 (99.0%) remaining out of 5569

AG6.P19	Extraordinary origins of everyday things / Charl	Stacks
<input type="text" value="30594001823802"/>	Present <input type="radio"/> Missing <input type="radio"/>	Condition: <div style="border: 1px solid black; padding: 2px;"> <input checked="" type="checkbox"/> Select <input type="checkbox"/> Excellent <input type="checkbox"/> Acceptable/Good <input type="checkbox"/> Unacceptable </div>
AP4.S36W4	The Savoy: nineties experiment. Edited with an i	Stacks
<input type="text" value="30594001175278"/>	Present <input type="radio"/> Missing <input type="radio"/>	Condition: <input type="text" value="Select"/>
AZ105.C737 2004	A companion to digital humanities / edited by Su	Stacks
<input type="text" value="30594001413935"/>	Present <input type="radio"/> Missing <input type="radio"/>	Condition: <input type="text" value="Select"/>

Validation Sample Study #2

- Sample the specific population of titles proposed for retention at Partner libraries, to determine what level of redundancy best offsets the risk of low inventory while avoiding retention costs that are statistically unlikely to make a difference

Challenges faced so far, lessons we are learning

Challenges

- Overall complexity of project: short timeframe & many things to do
- Groundbreaking study: size, scale & understanding statistics
- Large and diverse membership
- Scope creep temptations
- Starting multiple teams from scratch

Learning

- Remote work and meetings are effective (virtual team works well together)
- Flexibility, problem solving skills, willingness to recalculate are necessary

Thank you!

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