

EAST Member Update

June 13, 14 & 17, 2016

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BLC

BOSTON LIBRARY CONSORTIUM



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Our Agenda

- EAST governance update
- Results of Validation Sample Study #1
- The EAST retention model
- From retention to allocation
- Disclosing retention commitments
- Policy work and MOU
- EAST outreach
- Q&A – will be throughout as well as at the end

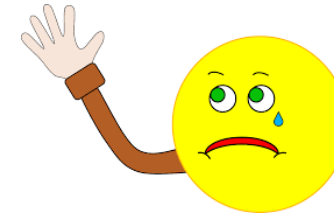


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EAST governance

John Unsworth, EC and Mellon co-PI



Tara Fulton, EC and Mellon co-PI



Anna Perricci, Project Manager
Sara Amato, Data Librarian
Matthew Revitt, Consultant



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EAST Major Milestones - 2016

- Data extracts for collection analysis - complete
- GreenGlass rolled out – complete
- Development of retention model(s) – complete
- EC approves final model – COMPLETE!
- Retention proposals reviewed – June 24 through July 29
- Retention commitments in GreenGlass – by mid to late August
- Disclosure of retention commitments – late 2016
- Policy reviews by MWG – In process
- Major policies submitted to EC for approval – In process
- MOU developed – In process for completion in Sept.
- MOU to EC for approval – Sept./Oct.
- EAST members execute MOU – Oct. – Dec.
- VSS#1 – COMPLETE!
- VSS#2 planning – July – August
- VSS#2 conducted – Oct./Nov.

Validation Sample Study # 1

- THANK YOU!
- 97% of monographs accounted for
- 90% in average or excellent condition
- 10% marked as in “poor” condition
- Will develop guidelines on repair, replacement or reallocation of titles not suitable for lending
- More details forthcoming

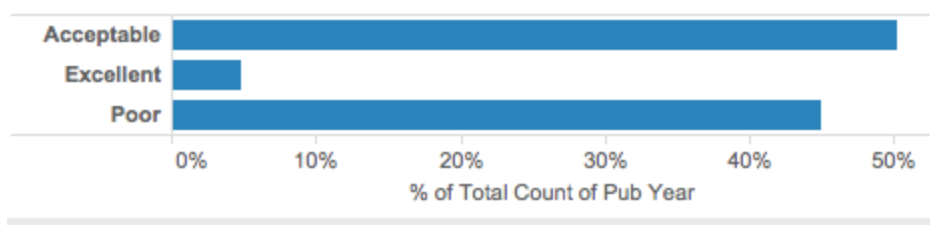


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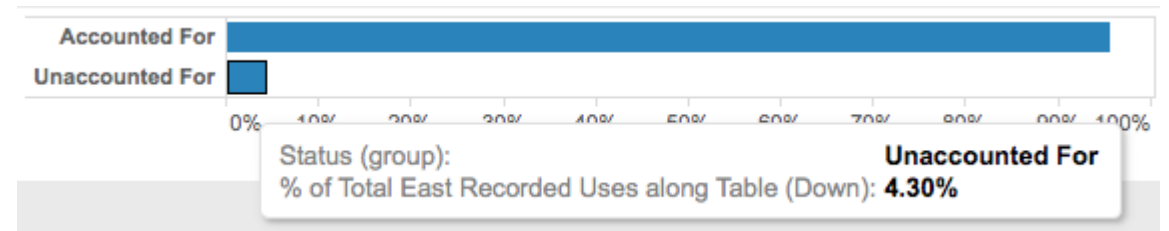
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Some other interesting data points...

Items published pre-1900 are in poorer condition overall:



Widely circulated items are slightly more likely to be unaccounted for:



Questions?

The EAST Retention Model

All Included Libraries

Retained Percentage: 36%

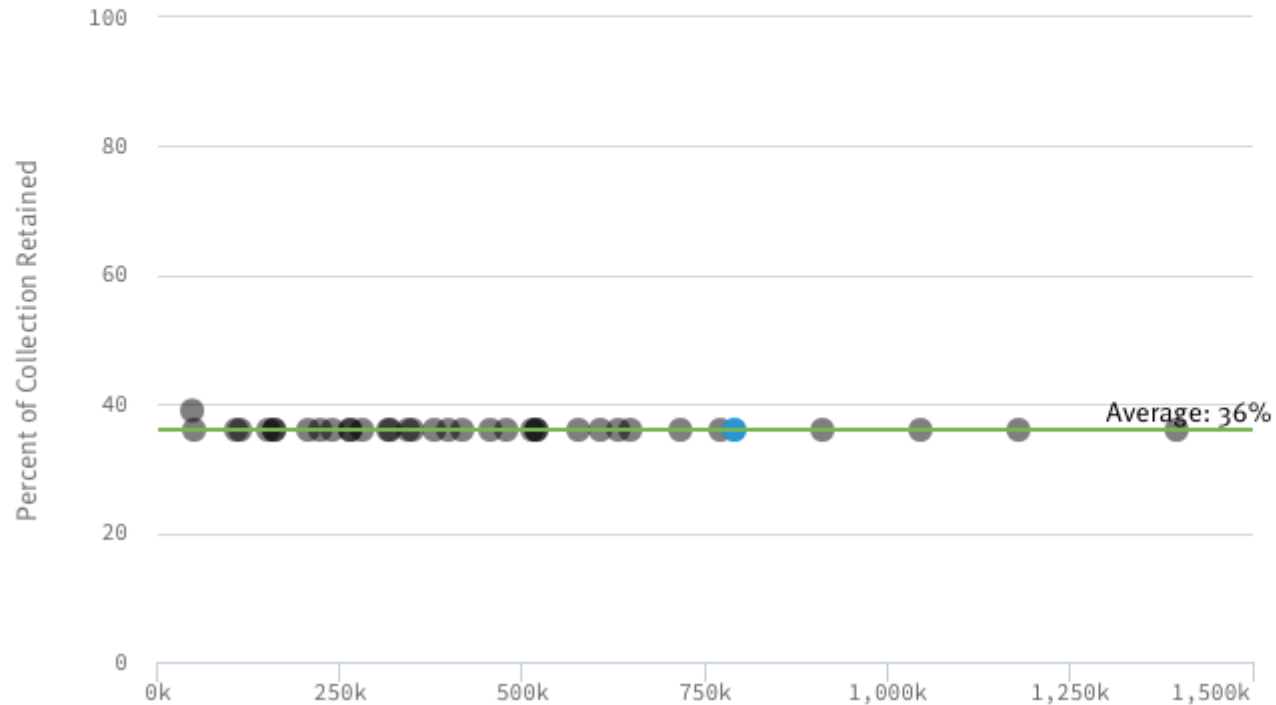
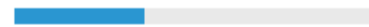
Retained Holdings: 6,003,283



Brandeis University

Retained Percentage: 36%

Retained Titles: 286,045



Criteria

LIBRARIES

Includes 36 of 36 Libraries

- Retain all scarcely held

RETAIN ALL

- Retain up to 5 of frequently used

EAST holdings

FEWER THAN 5

- Retain one of everything else

US holdings

FEWER THAN 40
(ANY EDITION)

Regional Large Academic Libraries

holdings

FEWER THAN 5
(ANY EDITION)

For most libraries: A maximum of 36% holdings to be retained

Estimated Retention Results

LIBRARY	TOTAL TITLES	RETAINED TITLES	RETAINED PERCENTAGE
Amherst College	606,537	219,649	36%
Boston College	1,045,648	378,669	36%
Boston University	632,331	228,991	36%
Brandeis University	789,877	286,045	36%
Bridgewater	224,720	81,380	36%
Bryn Mawr College	457,798	165,786	36%

Microsoft Document Connection

(ANY EDITION)

Publication year
BEFORE 2011

Ephemera
NOT EPHEMERA

RETAIN 5

Aggregate uses
MORE THAN 30

Publication year
BEFORE 2011

Ephemera
NOT EPHEMERA

- A few exceptions
- Five Colleges Depository at 100%
- U Mass-Amherst at up to 90%
- Yeshiva University at up to 60%
- Elms College at up to 50%



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From retention to allocation

- EAST retention model approved by EC on June 6th
- SCS now begins the allocation process
- SCS developing a video to provide to EAST libraries on how to review the allocations
- Anna will be in touch once the allocations are available to be downloaded by each Retention Partner– expect an email to go out @June 24th
- Libraries will be asked to complete their review by July 29



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Disclosing retention agreements and other post allocation work

- OCLC work on a new batch disclosure tool
- The EAST “583” committee
 - Focus on developing guidelines for EAST members to update local ILS’ and union catalogs
 - Chaired by Sara Amato and working with representatives of the different ILS’ in EAST
- Goal is to have documentation available by summer’s end
- See also videos from SCS on post-allocation which provide guidance on using GreenGlass to generate reports in support of local collection development and eventual de-selection/weeding

Questions?



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Policy and MOU Work

- Focus on policy first, MOU language second
- Policy subgroup of the Monograph Working Group working with the East team, led by Matthew Revitt
- Policies based on those coming out of the planning process
- MOU discussions have begun based on agreed upon policies
- Executive Committee reviewing and approving as developed by Policy subgroup
- Review by EAST community with formal MOU and agreed policies in place by late fall, 2016
- EAST members execute MOU as approved by EC – expected by December, 2016



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Examples of the Policies

- Selection
- Ownership and Location
- Retention
- Validation
- Access & Fulfillment
- Delivery
- Operating Procedures
- Disclosure
- Discovery
- Expect to add policies relating to retained holdings found to be in unacceptable condition or missing as well as those relating to member's inability to continue their retention commitments



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Other Ongoing Work of the EAST Team

- Validation Sample Study #2 – planning to begin July with statistical consultant and implementation to commence in fall
 - **REMINDER:** Please DO NOT weed before this is completed. If you must, please notify us.
- EAST outreach
 - PAN meeting at ALA
 - “EAST by Northeast” article
<http://digitalcommons.du.edu/collaborativelibrarianship/>
 - Recent presentations at ACRL New England and NETSL by Anna/Matthew

Member Meeting and Funder Reporting

- Planning for a Membership meeting on **October 14th in Boston** – for both current and potential future members – please **SAVE THE DATE**
- Formal report to the Davis Educational Foundation on collection analysis work – June 30th
- Formal report to Mellon on FY16 work – September 30



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Eastern Academic Scholars' Trust



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[About Us](#)

[Collection Analysis](#)

[Validation](#)

[Retention & Access](#)



We aim to preserve access to printed scholarly texts, while freeing library space for new uses. [ABOUT US >](#)

Collection Analysis >

Participating member libraries undergo a thorough collection analysis to determine mauris porttitor purus non erat elementum

Validation >

Member libraries validate the findings of the collection analysis by non erat elementum laoreet. Aliquam vel iaculis nulla lorem

Retention & Access >

Members agree to retain selected print titles for 15 years, and guarantee access by mauris porttitor purus non erat elementum

Responsibilities of Members Remainder of 2016

- Retention and allocation
 - Review initial retention allocations – by July 29th
 - Retention commitments finalized in GreenGlass– August
 - Final MOU – Sept./Oct.
 - MOU executed by members – Oct. – Dec.
- Other
 - VSS #2 – details TBA in July/August
 - Disclosure – details from 583 group
 - Come celebrate with us and promote EAST – October 14, 2016 in Boston – details forthcoming

Reminder: Libraries should wait to commence any weeding and deselection until VSS#2 is completed in the fall whenever possible.

THANK YOU!

Thank you.

Q & A



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