Building a Shared Print Network in New England and Beyond

NETSL Annual Spring Conference

April 8, 2016

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Informal EAST audience census

Show of hands

- Are you affiliated with a library that is an EAST partner?
- Are you a member of the Monographs WG or Validation WG?
- Are you a Validation Sample Study Coordinator?
- Are you otherwise interested in 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

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EAST teams

EAST leadership team

- Anna Perricci, EAST Project Manager
- Lizanne Payne, Shared Print Consultant
- Matthew Revitt, 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)

- 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 & partnerships
- Access to a large data set in GreenGlass for collection analysis (containing over 16.5 million monographs)
- Preliminary policies drafted for a sustainable and robust shared print project
- Financial support from partners/members, the Mellon Foundation (supporting implementation phase) & the Davis Educational Foundation (collection analysis)

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Validation Sample Study #1

- A small **sample study** to determine an "availability metric" that provides a rough estimate of the percentage of library holdings likely to be available (are accounted for)
- This metric will be used by the Monograph Working Group in May as one factor in determining how many copies to retain
- Each library received a list of 6,000 titles randomly selected from the in-scope records that were sent to SCS
- Libraries are checking the local ILS and shelves to determine availability, and perform a quick condition assessment of the items

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Validation Sample Study #1

- **Thank You** to the Validation Working Group members and Validation Sample Study Coordinators!
- Training and outreach completed in February
- Libraries ran checks against ILS (identify checked out materials)
- Data collection began in earnest week of Feb. 22
- Completion April 22nd
- Anonymized data reviewed by MWG with recommendation to EAST Executive Committee by early June

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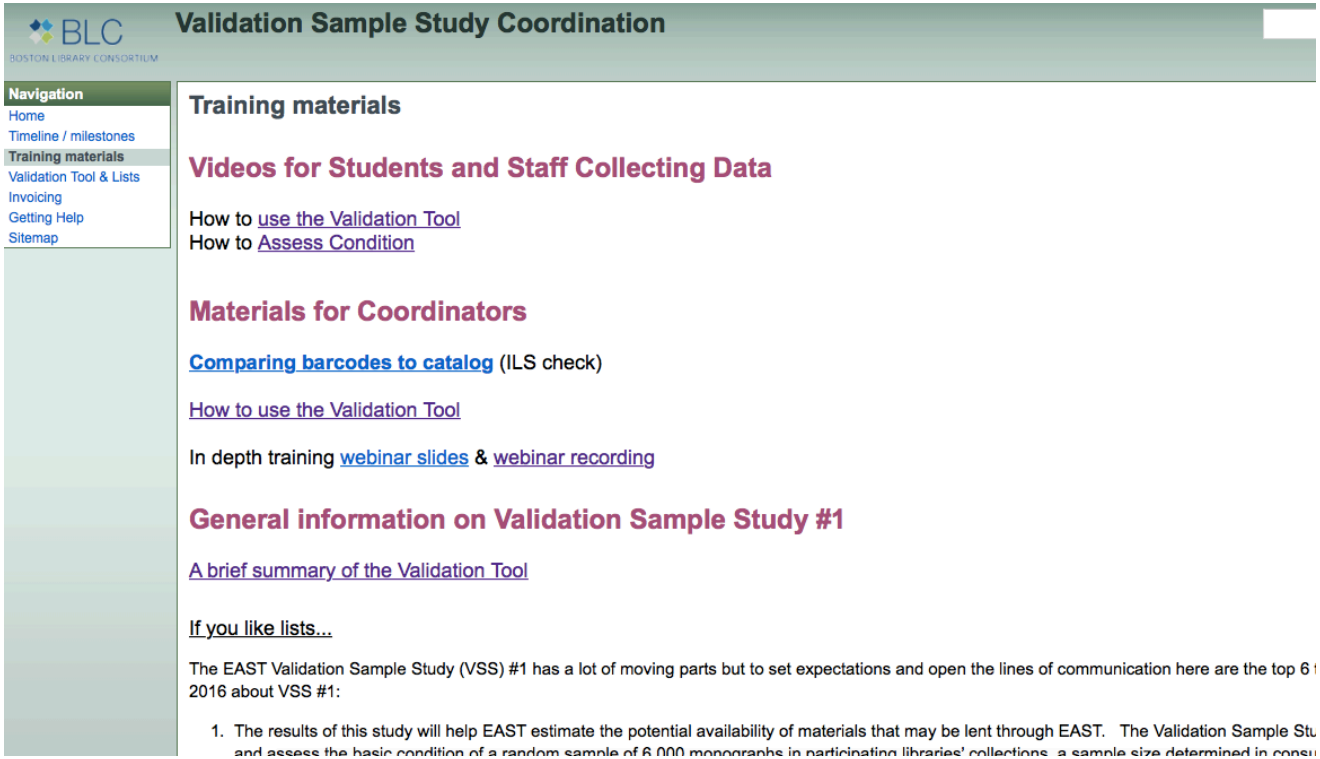
End Result - Availability Metric

STATUS	DEFINITION	COUNTED AS
Present	Catalog status reflects availability on shelf, and the item has been verified to be present.	Accounted For / Available
CheckedOut	Catalog status reflects the item is in circulation.	Accounted For / Available
LMBO	Catalog status reflects the item is Lost, Missing, Billed or Otherwise not currently available.	Unaccounted For / Unavailable
NotOnShelf	Catalog status reflects availability but item was not found on shelf.	Unaccounted For / Unavailable

https://sites.google.com/a/blc.org/validation-study-coordination/training-materials



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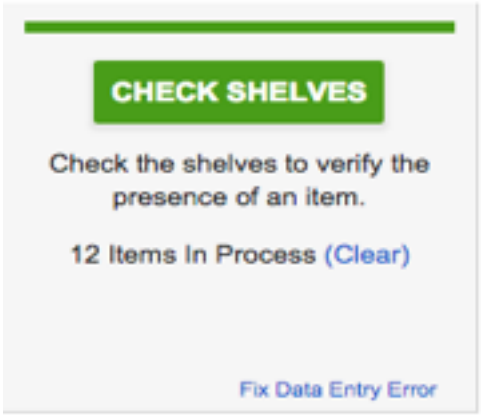
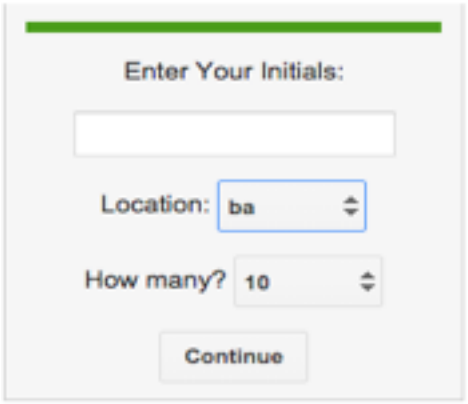
Introduction to the Validation Tool: Check Shelves





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Introduction to the Validation Tool: Barcode Wanding

The preferred method of data collection is to wand barcodes.
A barcode ‘hint’ is offered in the barcode field to assist with locating correct volume.

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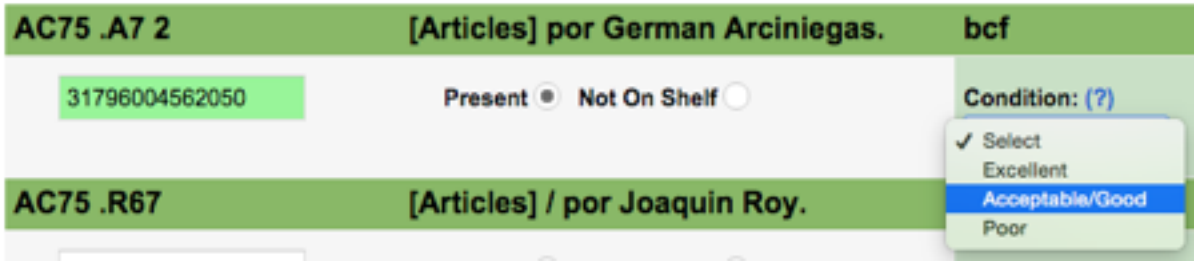
Items which are identified as present require a condition assessment



Data can not be submitted without this assessment being completed.

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Status of Data Collection

Our data collection tool provides real-time data updates to the EAST team

As of Thursday, April 7, the libraries have checked over 90% of the total of sample and of those over 217,000 items, 97% were accounted for

19 libraries have completed data collection as of 4/7

Summary

Totals	# Checked	% Accounted For	Average Condition	% Validated by Barcode	% In Circ
	217363 (90.6%)	97.0%	2.2 1=poor,2=average,3=excellent	87.0	2.6

Status	Definition	Counted As
Present	Catalog status reflects availability on shelf and item has been verified as present.	Accounted For / Available
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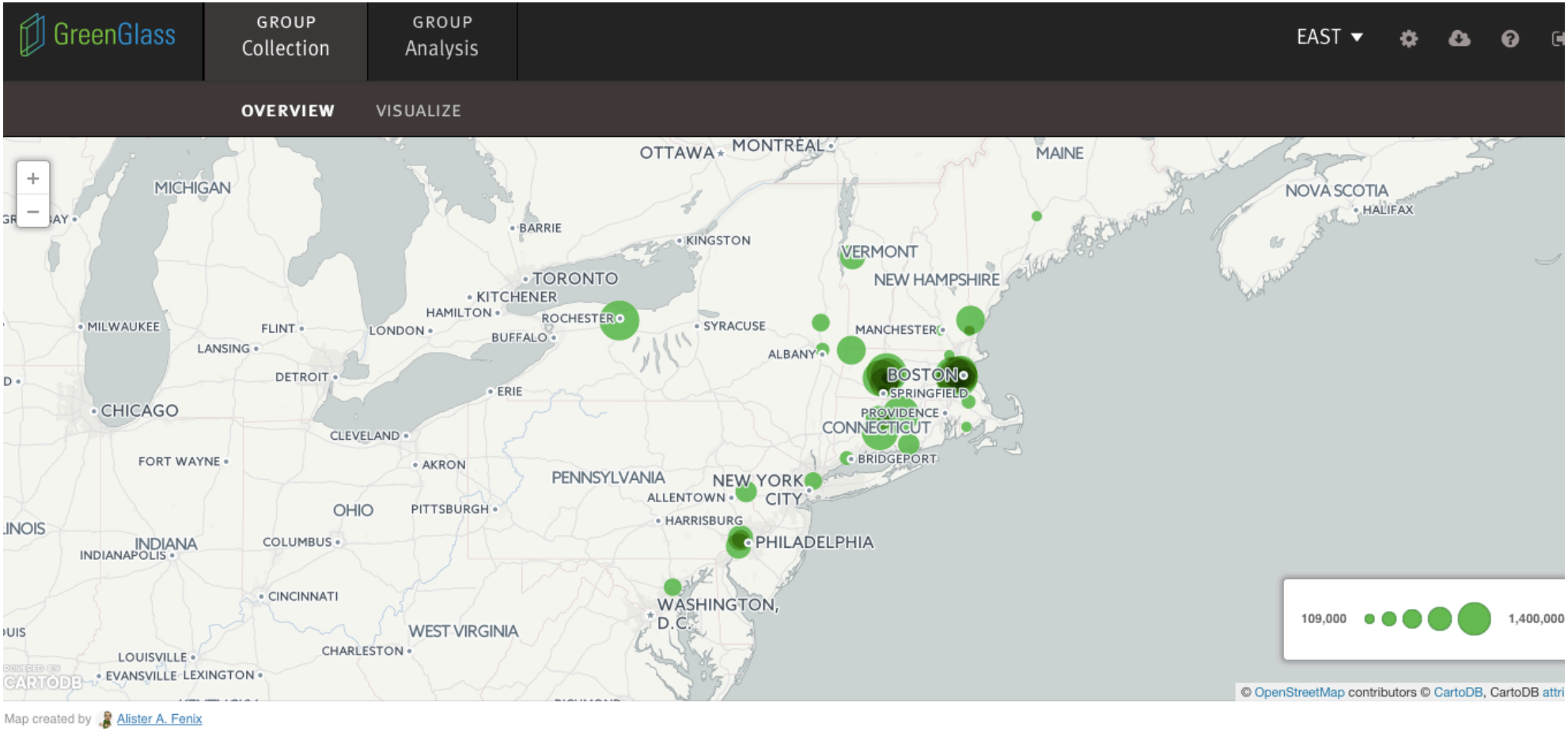

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The EAST Shared Print Collection

title sets

4,749,042

title holdings

16,573,071

title sets held by one library in the group

50%

2,359,033 title sets

title sets with > 10 aggregate uses

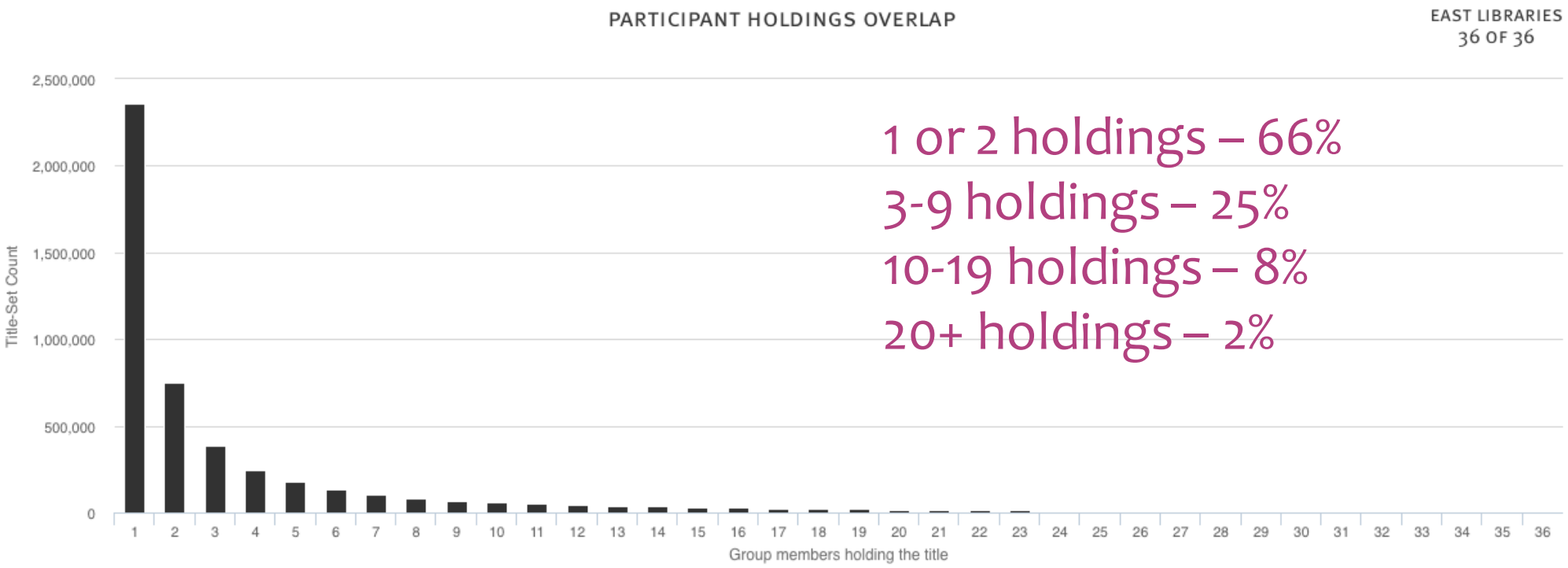
20%

939,819 title sets

title sets represented in hathitrust

39%

1,865,115 title sets



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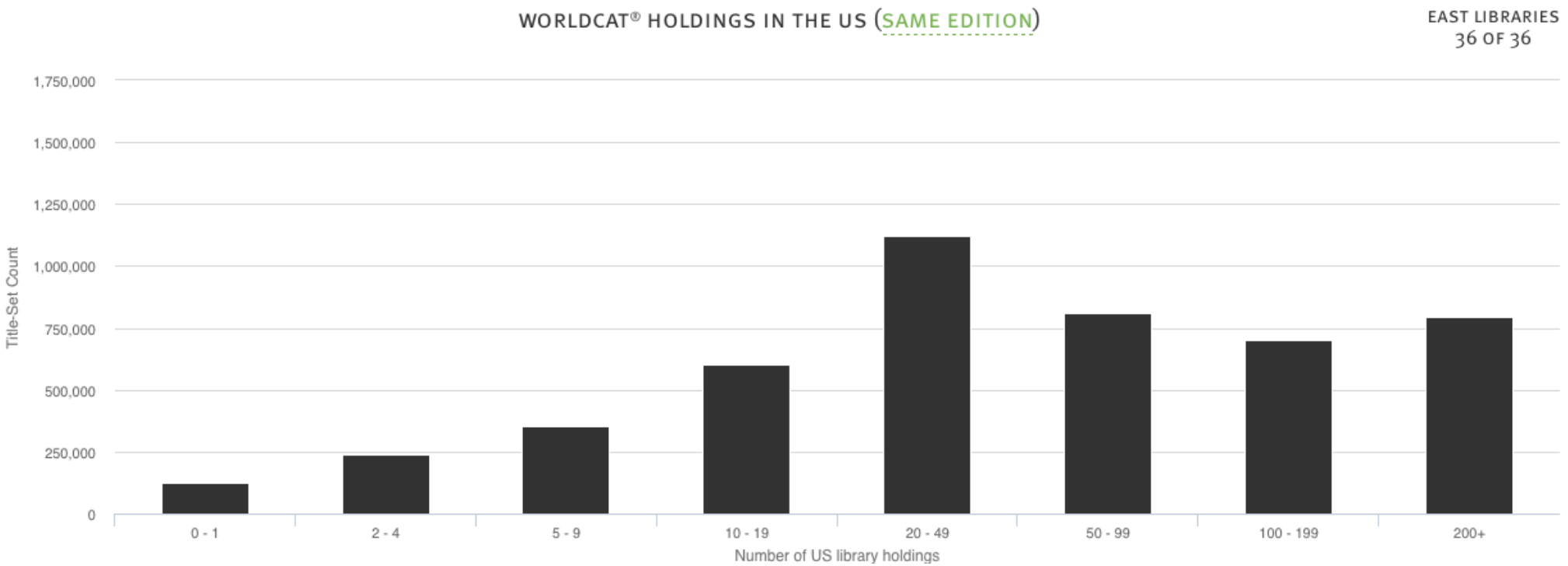

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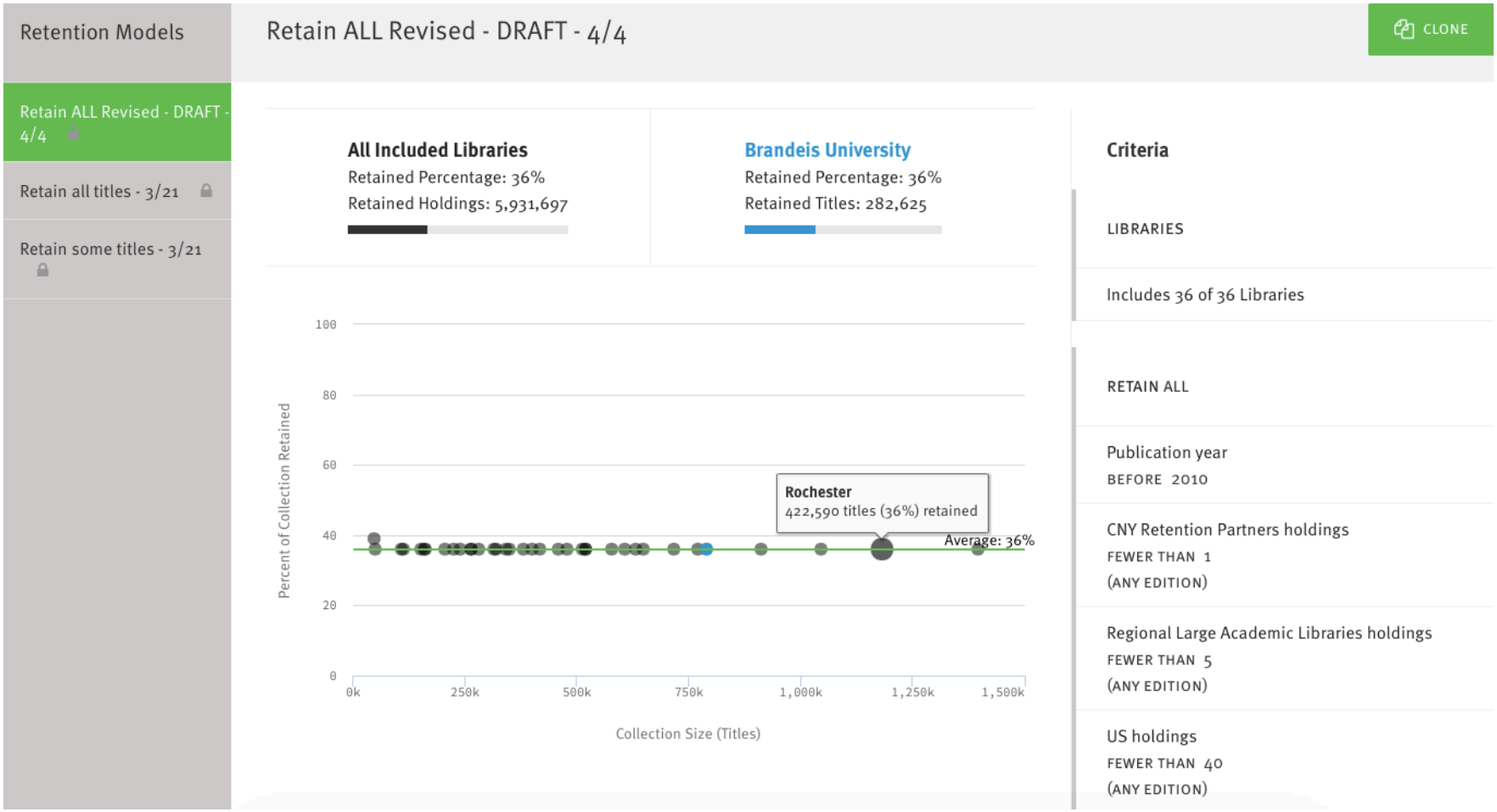

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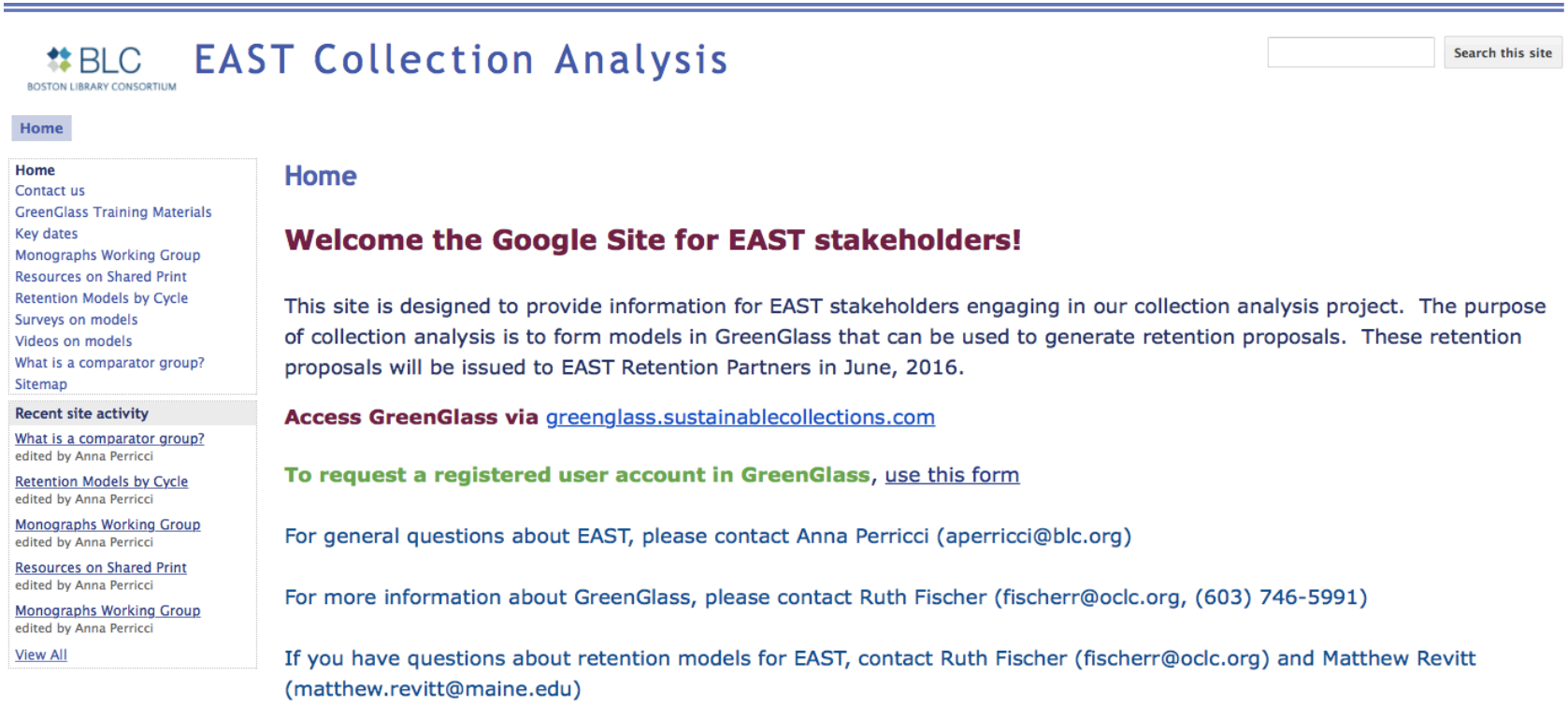
Fundamental discussions in modeling

- Retain only some or retain at least copy of every title?
- What is the local capacity for retention—does it or how much does it vary from one institution to another?
- Ultimately how does one form algorithms to meet the local needs in a way that is manageable and sustainable through EAST?

https://sites.google.com/a/blc.org/east-collection-analysis/



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Policy and MOU Work

- Focus on policy first, MOU language second
- Policies based on those coming out of the planning process
- MOU discussions commence May/June
- September – Final review of MOU terms & conditions, and policies
- Review by EAST community with formal MOU and agreed policies in place by late fall, 2016 (upon Executive Committee approval)
- EAST members execute MOU, expected by December, 2016

Other Ongoing Work of the EAST Team

- In discussion with OCLC on batch updating of WorldCat with final retention commitments
- Future planning for EAST – coordination with other regional and national programs
- Future planning for 2nd cohort of EAST libraries in FY18

EAST Major Milestones (2016)

- ✓Data extracts for collection analysis
- ✓GreenGlass rolled out
- Development of retention model(s) – mid March – mid May
- EC approves final model(s) – early June
- Retention proposals reviewed – June through late July
- Retention commitments finalized – by mid to late August

Thank you!

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