



Building a Shared Print Network in New England and Beyond

NETSL Annual Spring Conference

April 8, 2016

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Eastern Academic Scholars' Trust

 **BLC**
BOSTON LIBRARY CONSORTIUM

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?

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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

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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

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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Validation Sample Study Coordination

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Training materials

Videos for Students and Staff Collecting Data

How to [use the Validation Tool](#)
How to [Assess Condition](#)

Materials for Coordinators

[Comparing barcodes to catalog](#) (ILS check)
[How to use the Validation Tool](#)
In depth training [webinar slides](#) & [webinar recording](#)

General information on Validation Sample Study #1

[A brief summary of the Validation Tool](#)

If you like lists...

The EAST Validation Sample Study (VSS) #1 has a lot of moving parts but to set expectations and open the lines of communication here are the top 6 1 2016 about VSS #1:

1. The results of this study will help EAST estimate the potential availability of materials that may be lent through EAST. The Validation Sample Stu and assess the basic condition of a random sample of 6 000 monographs in participating libraries' collections, a sample size determined in consu

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Introduction to the Validation Tool: Check Shelves

CHECK SHELVES

Check the shelves to verify the presence of an item.

12 Items In Process (Clear)

[Fix Data Entry Error](#)

Enter Your Initials:

Location:

How many?

Continue

AC75 .A7 2	[Articles] por German Arciniegas.	bcf
<input type="text" value="31796004562050"/>	Present <input type="radio"/> Not On Shelf <input type="radio"/>	Condition: (?) <input checked="" type="checkbox"/> Select Excellent Acceptable/Good Poor
AC75 .R67	[Articles] / por Joaquin Roy.	
<input type="text" value="31796101408595"/>	Present <input type="radio"/> Not On Shelf <input type="radio"/>	Condition: (?) <input type="text" value="Select"/>

Introduction to the Validation Tool: Barcode Wandering

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.

AC75 .A7 2	[Articles] por German Arciniegas.
31796004562050	Present <input checked="" type="radio"/> Not On Shelf <input type="radio"/>

AC75 .A7 2	[Articles] por German Arciniegas.
31796004562059	Present <input type="radio"/> Not On Shelf <input type="radio"/>



Items which are identified as present require a condition assessment

AC75 .A7 2	[Articles] por German Arciniegas.	bcf
31796004562050	Present <input checked="" type="radio"/> Not On Shelf <input type="radio"/>	Condition: (?) ✓ Select Excellent Acceptable/Good Poor
AC75 .R67	[Articles] / por Joaquin Roy.	

Data can not be submitted without this assessment being completed.

Please fix 1 item(s) missing condition and re-submit

AC75 .A7 2	[Articles] por German Arciniegas.	bcf
31796004562050	Present <input checked="" type="radio"/> Not On Shelf <input type="radio"/>	Condition: (?) Select

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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

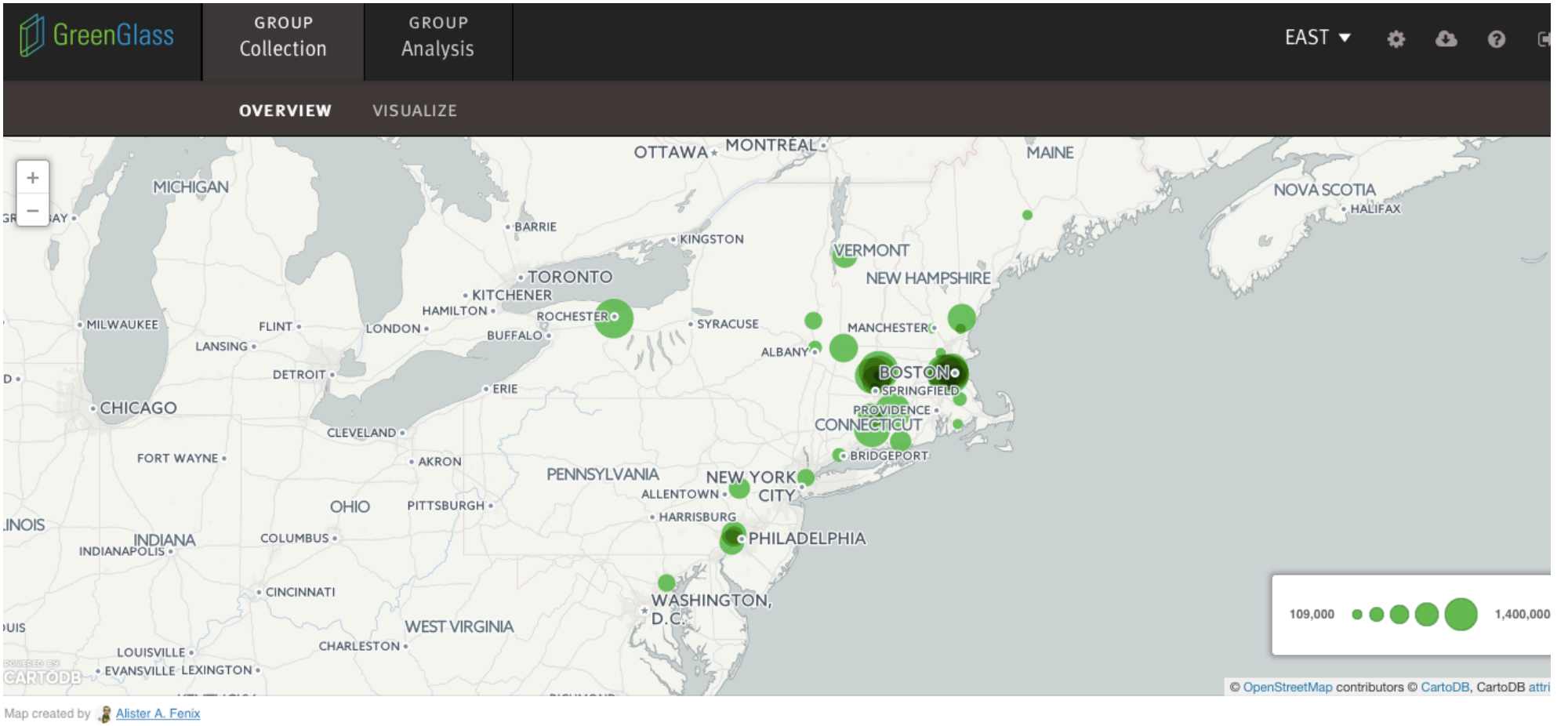
19 libraries have completed data collection as of 4/7

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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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

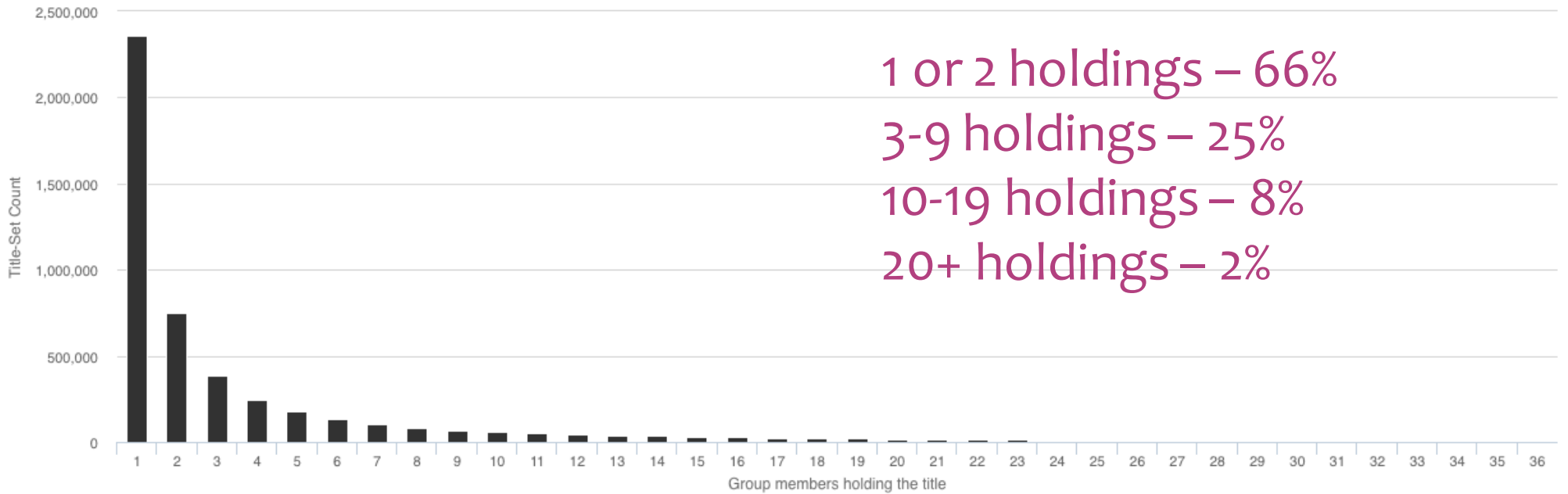
title sets represented in hathitrust

39%

1,865,115 title sets

PARTICIPANT HOLDINGS OVERLAP

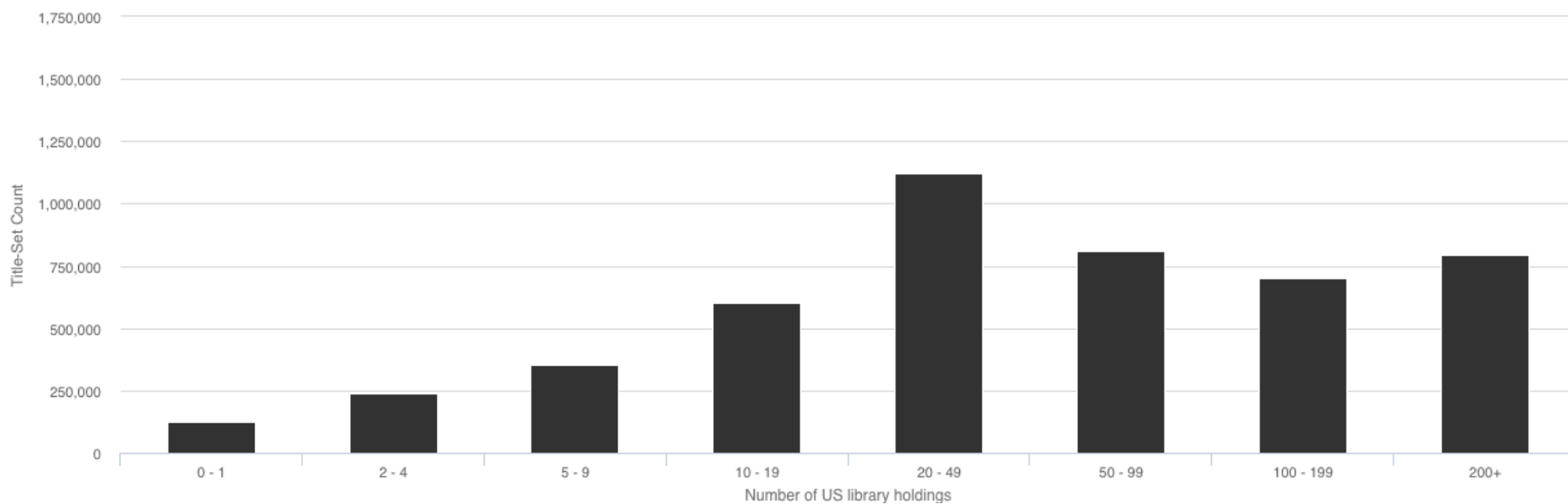
EAST LIBRARIES
36 OF 36



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WORLDCAT® HOLDINGS IN THE US (SAME EDITION)

EAST LIBRARIES
36 OF 36



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Retention Models

Retain ALL Revised - DRAFT - 4/4

CLONE

Retain ALL Revised - DRAFT - 4/4

Retain all titles - 3/21

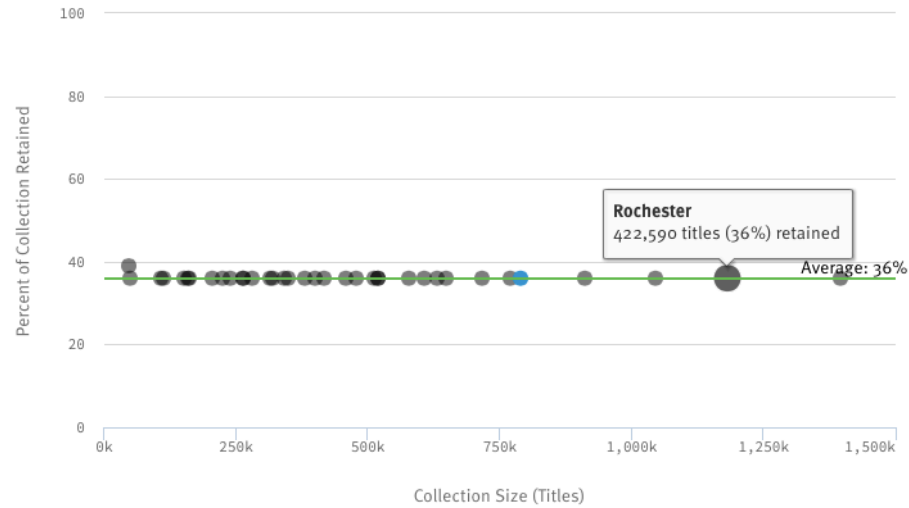
Retain some titles - 3/21

All Included Libraries

Retained Percentage: 36%
Retained Holdings: 5,931,697

Brandeis University

Retained Percentage: 36%
Retained Titles: 282,625



Criteria

LIBRARIES

Includes 36 of 36 Libraries

RETAIN ALL

Publication year
BEFORE 2010

CNY Retention Partners holdings
FEWER THAN 1
(ANY EDITION)

Regional Large Academic Libraries holdings
FEWER THAN 5
(ANY EDITION)

US holdings
FEWER THAN 40
(ANY EDITION)

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Fundamental discussions in modeling

- Retain only some or retain at least 1 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/>



EAST Collection Analysis

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Home

Welcome the Google Site for EAST stakeholders!

This site is designed to provide information for EAST stakeholders engaging in our collection analysis project. The purpose of collection analysis is to form models in GreenGlass that can be used to generate retention proposals. These retention proposals will be issued to EAST Retention Partners in June, 2016.

Access GreenGlass via greenglass.sustainablecollections.com

To request a registered user account in GreenGlass, [use this form](#)

For general questions about EAST, please contact Anna Perricci (aperricci@blc.org)

For more information about GreenGlass, please contact Ruth Fischer (fischerr@oclc.org, (603) 746-5991)

If you have questions about retention models for EAST, contact Ruth Fischer (fischerr@oclc.org) and Matthew Revitt (matthew.revitt@maine.edu)

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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

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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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