

Retaining and Preserving the Scholarly Record: An Update on the Eastern Academic Scholars' Trust

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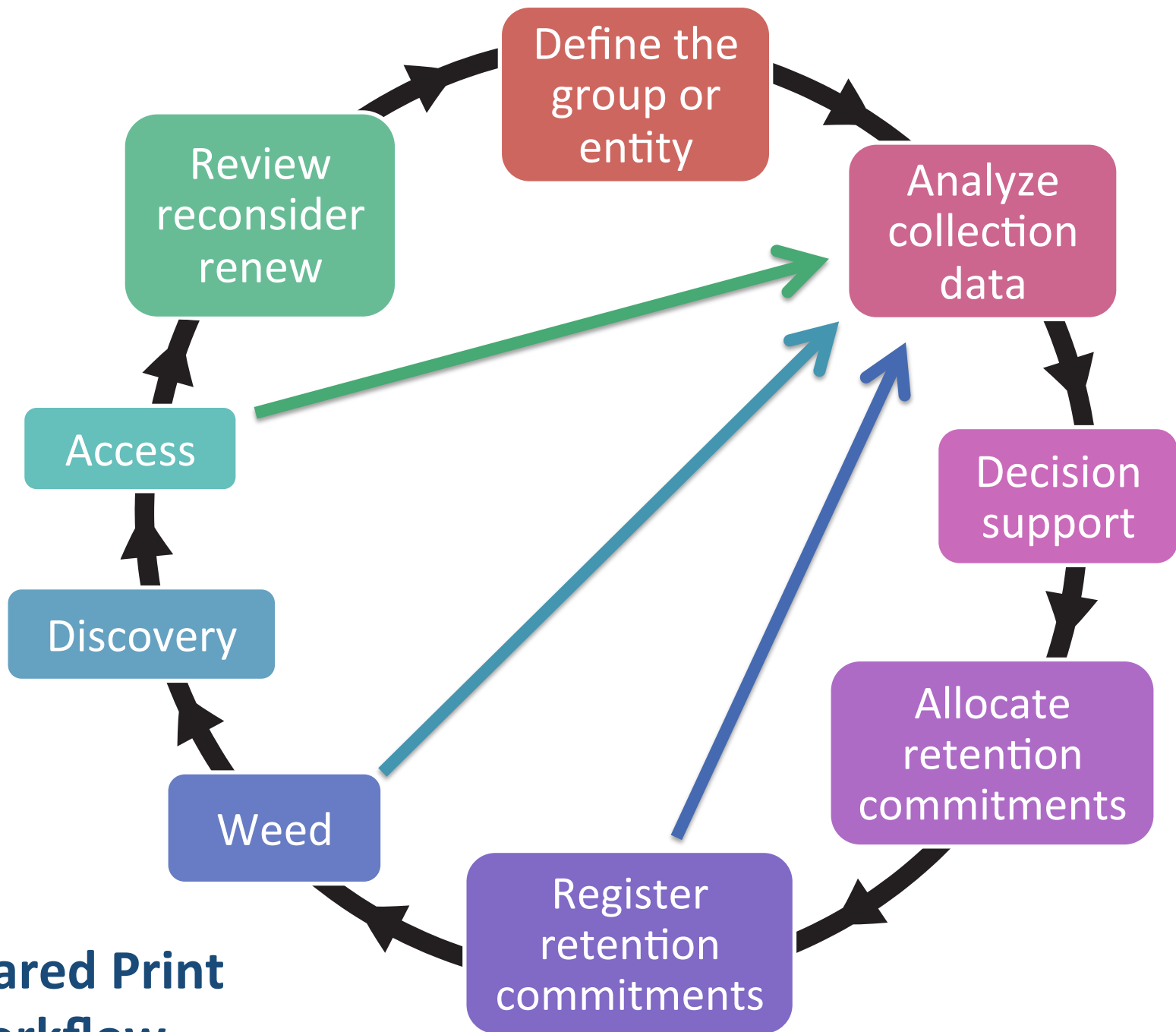
BOSTON LIBRARY CONSORTIUM

From NERD to EAST

- Initial planning 2012-2014 – Mellon Foundation Officer's Grant to Five Colleges, Incorporated
- Academic and research libraries in New England, New York and Pennsylvania
- Large scale collection analysis
- BLC to act as host institution
- Currently awaiting funding



Shared Print Workflow





EAST project goals

- Analyze 20M+ monographs 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 and business model
- Plan for the future of EAST
- Explore relationships with other regional and national shared print programs





The EAST Membership

- Two forms of membership
 - Retention Partners
 - Supporting Partners
- Annual membership fees
- Contribution to offset large scale [and expensive] collection analysis
- 47 current members
 - 37 as monograph retention partners (some also for journals)
 - 1 as journal retention partner only
 - 9 as Supporting Partners
- Coordination with Maine Shared Collections and ConnectNY as retention commitments are made





Anticipated business model for EAST

- Decentralized print retention and sharing
- Organizational development supported by grant funding
- Members contribute annual fees and modest portion of offset for collection analysis
- Projecting adding Retention Partners in Year 3 with additional round of collection analysis
- Ongoing sustainability via members' fees





Retention in EAST

- Minimum of 15 year retention commitment for both monographs and serials
- Formal – but lightweight – agreement
- Retention commitments to be revisited at least 2 years before they end and at least every 5 years after that
- May be recalibrated in light of yet to be established national or international efforts





Collection analysis

- Very large scale with over 20 million volumes to be analyzed
- Compares circulating monograph holdings of participating members
- 40 EAST libraries will participate in first group
 - 34 new data
 - 6 recent SCS analyses
- Monograph Working Group
- Decision support for modeling of various scenarios



Validation

- Goal is to build trust in retention commitments
- EAST will focus on inventory confirmation
- Two stage sampling process
 - Random sample of volumes from full collections – to determine level of confidence in existence
 - Stratified sample at the consortium level based on level of redundancy – to inform number of copies retained





Access and delivery

- EAST is a light archive
- Holdings discoverable using existing systems
- Fulfillment of request for materials through ILL using existing systems
- Current plan is for no charge for ILL to other EAST members





Project staffing

- 1.5 FTE for EAST staff
 - Project Manager and Data Librarian
- Lizanne Payne, Shared Print Consultant
- Statistical Consultant to design and analyze validation study
- Mellon Foundation proposal
 - John Unsworth of Brandeis and Laura Wood of Tufts as Co-Principal Investigators
 - Susan Stearns, BLC, as Project Director





Timeline

- Pre-grant activities – Spring, 2015
 - Elect Executive Committee
 - Begin work on MOU
 - Establish Working Groups
- Year 1 July, 2015 – June, 2016
 - Hire staff
 - Reconfirm or revise policies
 - Validation study #1
 - Monograph collection analysis





Timeline

- Year 2 July 2016 – June 2017
 - Validation study #2
 - Finalize retention agreements
 - Define future EAST membership
 - Collaborate with other regional/national shared print initiatives





Collaboration with other projects

- Coordinate with existing retention commitments
- Work to align with evolving regional and national initiatives
- We see EAST as the beginning of a more thoughtful and coordinated approach to print management





More information on EAST

- For information on the planning done through Five Colleges:
<https://www.fivecolleges.edu/libraries/regionalproject>
- To join the “interested parties” mailing list for EAST or discuss possible membership, contact Susan Stearns at the BLC: sstearns@blc.org or stay tuned through the BLC website:
www.blc.org



Thank you!

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