

It's 2031: Do you know where your scholarly monographs are?

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www.eastlibraries.org

The Charleston Conference

November 4, 2016



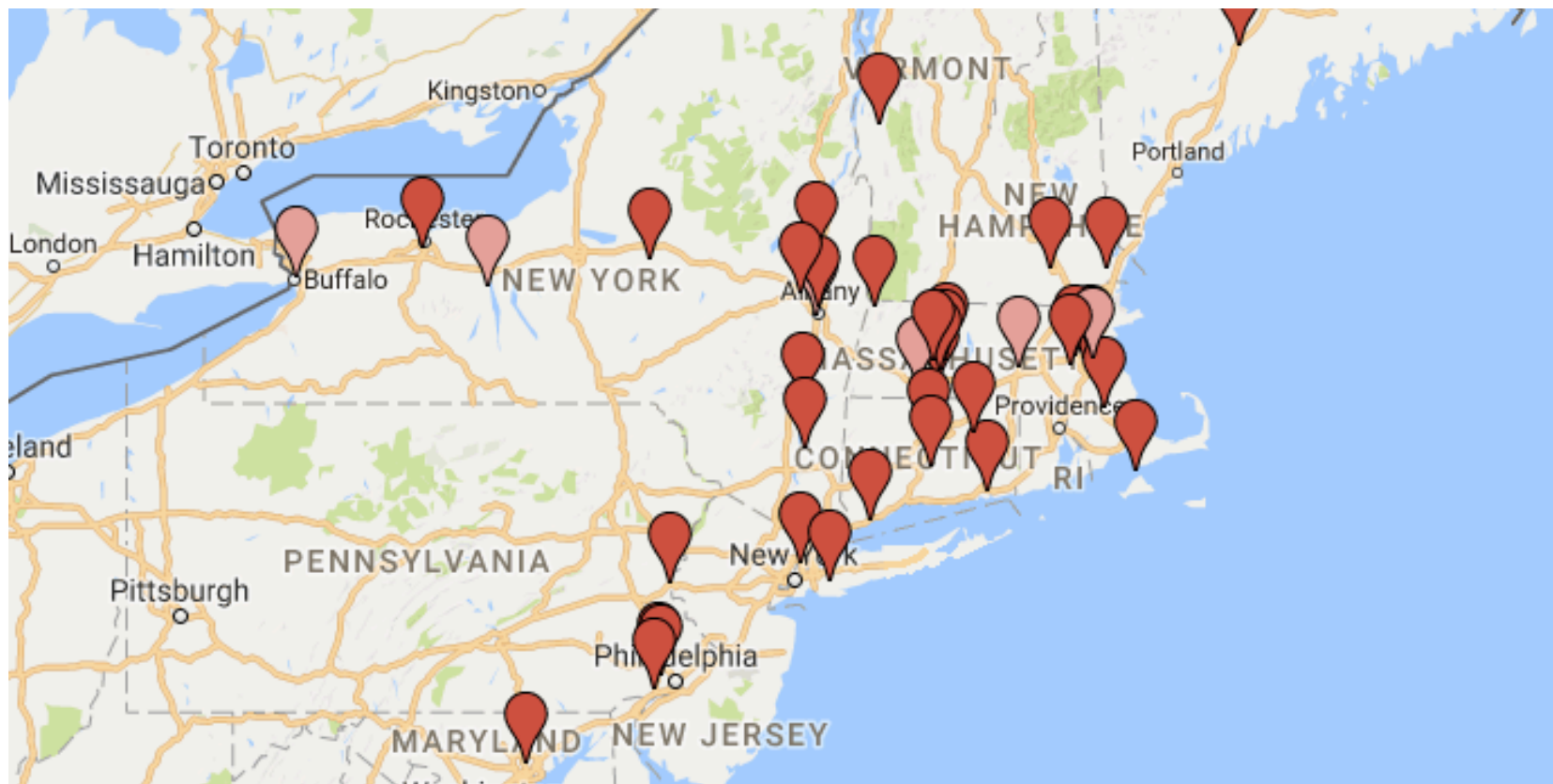
EAST

EASTERN ACADEMIC
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BOSTON LIBRARY CONSORTIUM

The Eastern Academic Scholars' Trust – Our Members Today



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Major milestones 2015 - 2016

Collection Analysis: over 16 million collective collection

Retention Commitments: more than 6 million holdings

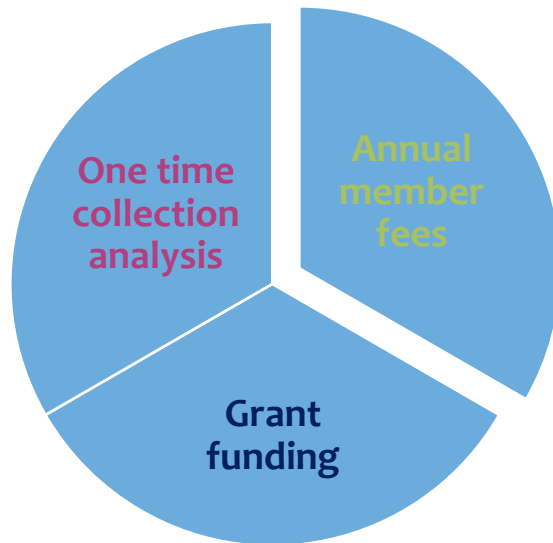
Validation Sampling: 97% availability

Policy Development: MOU and major policies

Disclosure of retention commitments

Collaborative work with others engaged in shared print

EAST business model



- **Members contribute @30%**

- **Staffing**
- **Administration**
- **Future grant funding requests**
- **Set aside for future collection analyses**

- **Implementation**
- **Collection analysis – 70% grant funded**
- **Validation sampling – 100% grant funded**
- **Set-aside for future collection analyses**

Work still to be done in 2016

Complete
disclosure

EAST lending
network

Serials/
journals
planning

Further
cohort 2
outreach

Collaborate,
converse,
convene



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[Member Resources](#) [Contact](#)

[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 >

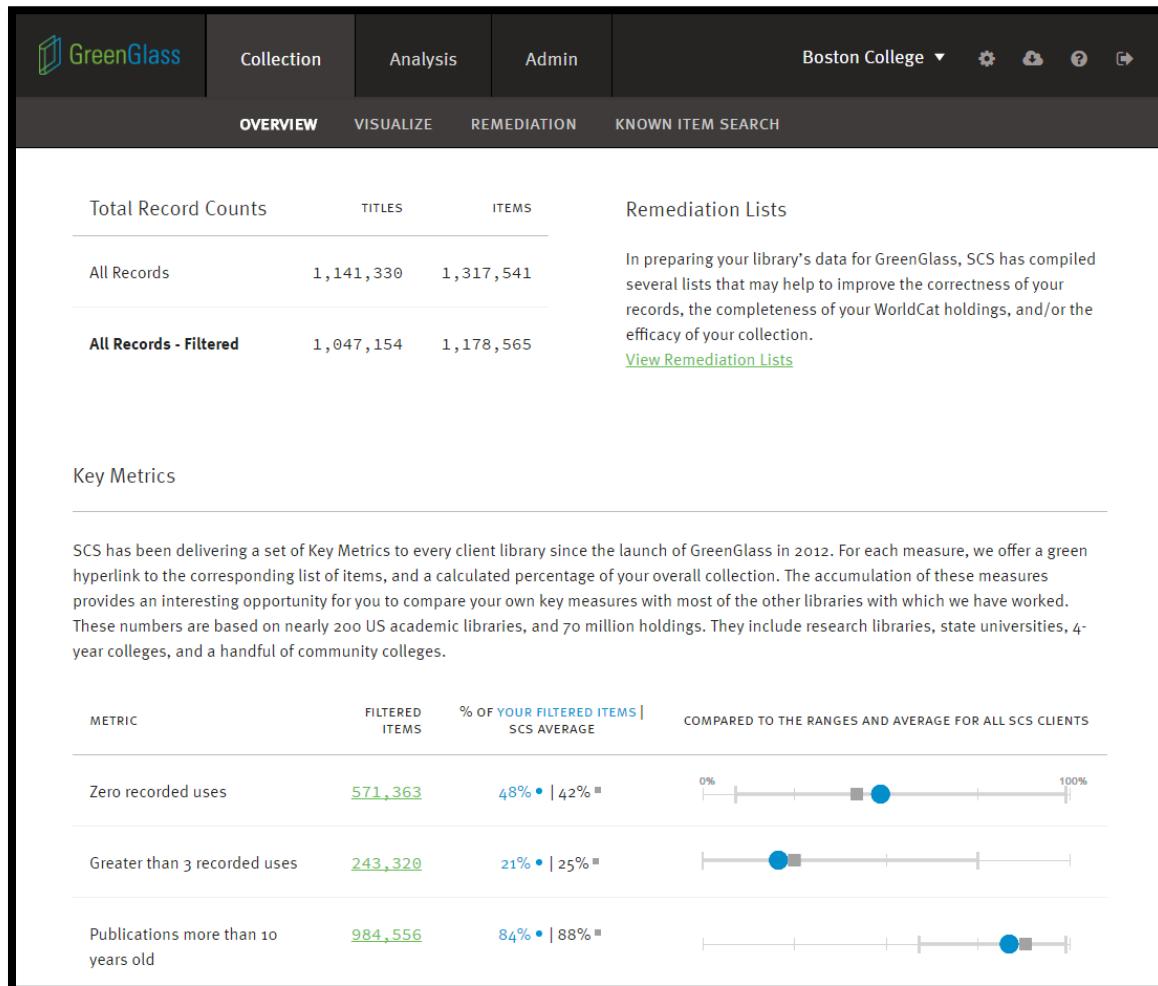
Members agree to retain selected
print titles for 15 years, and
guarantee access by mauris
porttitor purus non erat elementum



Helping Libraries Manage and Share Print Monographs

SCS

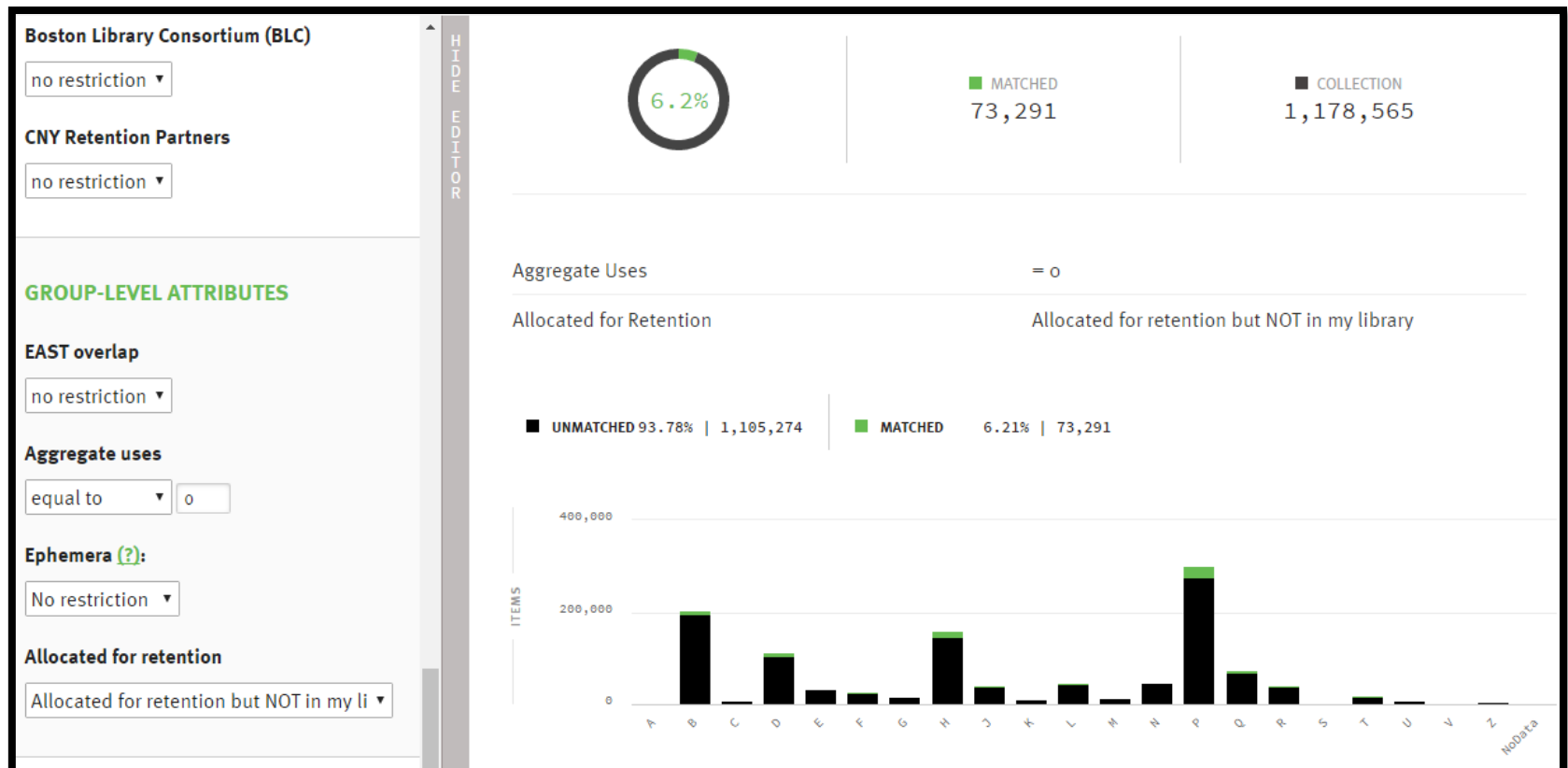
Introducing GreenGlass



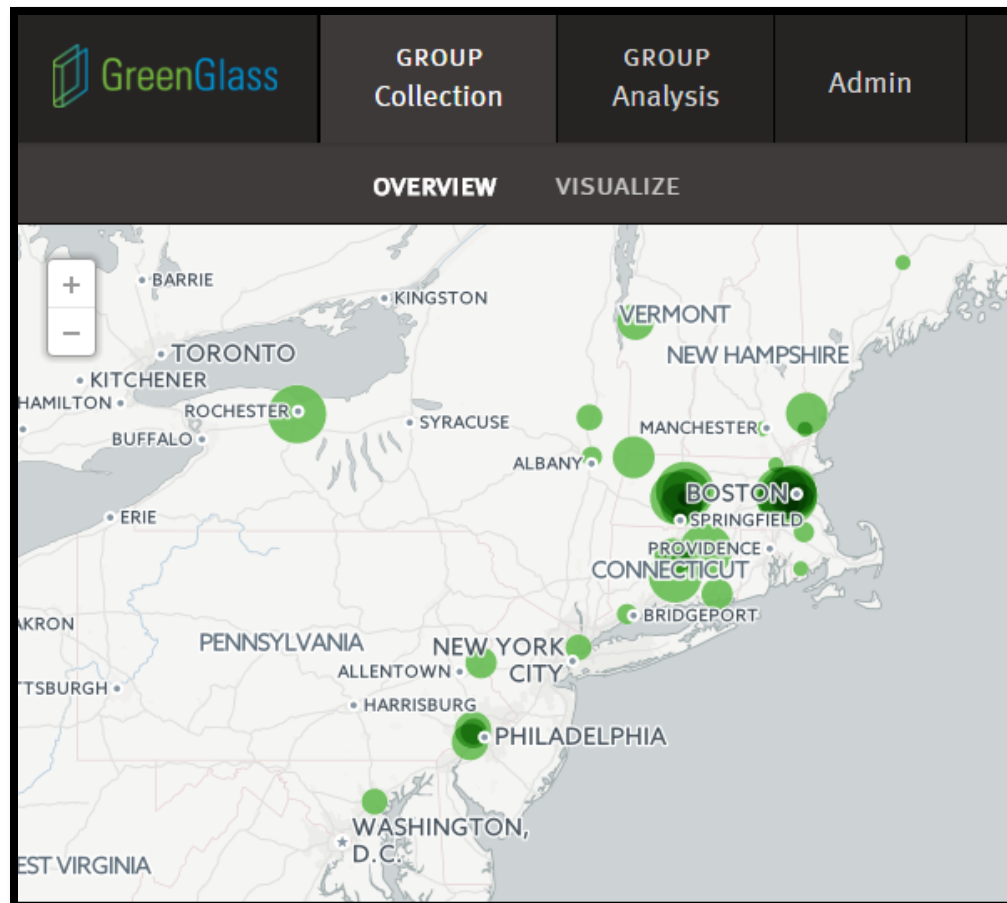
GreenGlass is a **web-based application** built by OCLC Sustainable Collection Services (SCS)

Model Collection Scenarios

GreenGlass gathers **metadata** and **enables librarians to model scenarios and create lists using a wide variety of criteria**



Coordinated Decision Support



GreenGlass provides intelligent decision support for **coordinated retention and/or informed deselection**

Meticulous Data Management



Adding Context: EAST Comparator Groups

- Regional Large Academic Libraries – 94 OCLC symbols
- Regional College Libraries – 15 OCLC symbols
- Maine Shared Collections – 8 Shared Print symbols
- Connect New York – 5 libraries' retained holdings from previous project

GreenGlass Group Functionality

GreenGlass Group functionality 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.

Shared Print: Retention First!

- Establish a safety net: ensure that content is secure
- Group-wide agreement on retention model
- Group-wide commitment to retention rules & duration
- Secure scarcely-held titles within the group
- Secure sufficient holdings to satisfy likely user demand
- Share responsibility for retention proportionately
- Deselection only **after** retention commitments established

Retention Models

GROUP
Analysis

Admin

EAST ▾



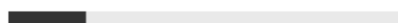
OVERVIEW

MODEL BUILDER

All Included Libraries

Retained Percentage: 20%

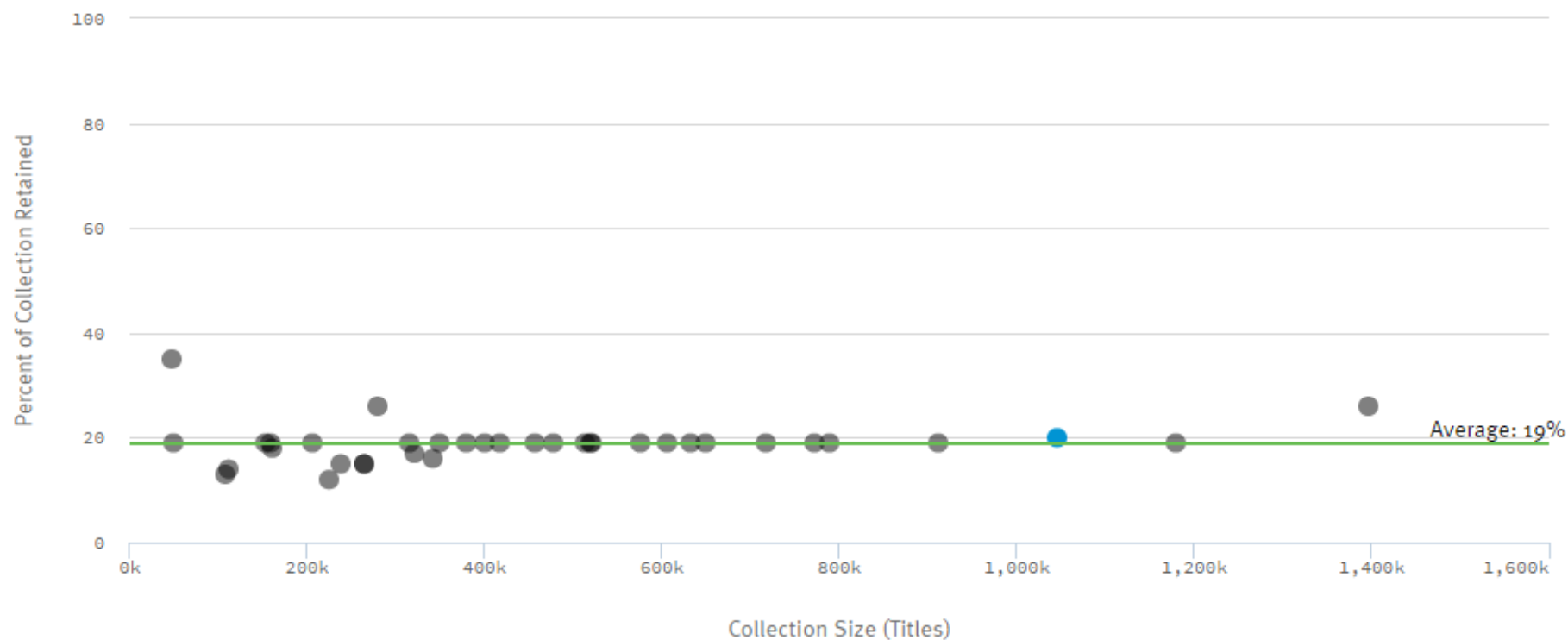
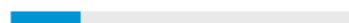
Retained Holdings: 3,251,922



Boston College

Retained Percentage: 20%

Retained Titles: 204,227



Retention Modeling: Parameters and Thresholds

Lorraine Huddy

CTW Librarian for Collaborative Projects and
Member of the EAST Collection Analysis Working Group

The Retention Model's Primary Components

1. Retention of ALL existing holdings for titles that are scarcely held.
2. Retention of up to FIVE holdings for titles with significant use across EAST.
3. Retention of ONE holding for titles that fall outside the above criteria.

EXCLUSIONS: Recently Published and “Ephemera”

Ephemera Rules

Holdings with limited scholarly value; items expected to have limited importance or usefulness over time.

- Examination prep books (GRE, GMAT, etc.)
- Computer & Software manuals
- Travel Guides, Textbooks

A publisher lists was created for the purpose of excluding these titles.

RESULT: Approx. 1% of EAST titles and title-holdings were flagged and excluded from retention allocations.

Final Retention Model

SCARCELY HELD TITLES

Retain ALL if

- EAST holdings fewer than 5
- US holdings fewer than 40 (any edition)
- Regional Large Academic Libraries holdings fewer than 5 (any edition)
- CNY Retention Partners holdings fewer than 1 (any edition)
- Publication year before 2011
- Not Ephemera

WIDELY USED TITLES

Retain 5 if

- Aggregate uses more than 30
- Publication year before 2011
- Not Ephemera

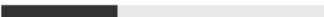
“Retain All” PARAMETER

Retain 1 if

- Publication year before 2011
- Not Ephemera

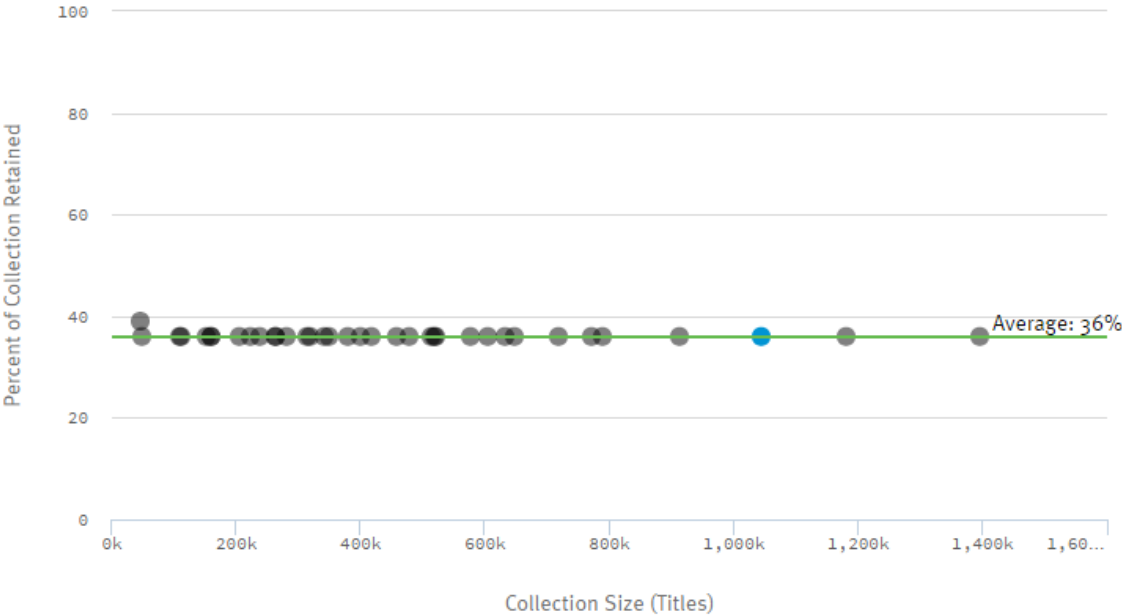
All Included Libraries

Retained Percentage: 36%
Retained Holdings: 6,003,283



Boston College

Retained Percentage: 36%
Retained Titles: 378,669



Estimated Retention Results

Criteria

LIBRARIES

Includes 36 of 36 Libraries

RETAIN ALL

EAST holdings
FEWER THAN 5

US holdings
FEWER THAN 40
(ANY EDITION)

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

CNY Retention Partners holdings
FEWER THAN 1
(ANY EDITION)

Publication year
2000-2024

Actual Retention Allocations:

- 5 Colleges Depository: 92%
- UMass - Amherst: 90%
- Yeshiva University: 59%
- Other Retention Partners: 28-30%

GreenGlass: Metrics and Allocations

METRIC	FILTERED ITEMS	% OF YOUR FILTERED ITEMS SCS AVERAGE	COMPARED TO THE RANGES AND AVERAGE FOR ALL SCS CLIENTS
Zero recorded uses	149,527	36% • 42% ■	
Greater than 3 recorded uses	194,022	47% • 25% ■	
Publications more than 10 years old	361,852	87% • 88% ■	
More than 100 US holdings - same edition	310,895	75% • 75% ■	
Fewer than five US holdings - any edition	3,477	1% • 1% ■	
Unique in Connecticut - any edition	20,433	5% NA	NA
In HathiTrust - in copyright	175,578	42% • 40% ■	
In HathiTrust - public domain	36,648	9% • 5% ■	
Ephemera (?)	2,518	1% NA	NA
Allocated for retention	119,721	29% NA	NA

Allocated for Retention

Allocated for retention

[← QUERY LIST](#)[EXPORT XLSX](#)[SAVE](#)

SUBJECTS

- ☒ All subjects
- ☐ Specific LC classes
- ☐ Specific Dewey ranges

LOCATIONS

- ☒ All locations
- ☐ Specific locations

FORMATS

Primary Language

language code(s)
example: "eng, spa, fre" [\(?\)](#)

LOCAL CIRCULATION HISTORY

Include items with the following threshold:

Recorded uses

no restriction ↕

Last charge date

no restriction ↕



MATCHED
119,721

COLLECTION
416,293

Allocated for Retention

Allocated for retention in my library

■ UNMATCHED 71.24% | 296,572 ■ MATCHED 28.75% | 119,721



SUBJECT	PERCENT MATCHED	MATCHED ITEMS	ITEMS
Total	28.76 %	119,721	416,293
A General Works	37.03 %	528	1,426
B Philosophy, Psychology, Religion	29.45 %	12,204	41,446

Pub Date Review for Special Collections

Copy of Allocated for retention



■ MATCHES 7,727 ITEMS

Subjects

Pub Year

Allocated for Retention

before 1900

Allocated for retention in my library

Allocated for retention



■ MATCHES 1,546 ITEMS

Pub Year

Allocated for Retention

before 1851

Allocated for retention in my library



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The EAST Validation Sample Study

Susan Stearns

EAST Project Director

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Validation Sample Study #1

- Goal: Sample a statistically significant number of items across the 40 EAST Retention partners to validate presence of items and, hence, provide assurance to EAST stakeholders that the shared print materials will be available for sharing
- Validation Working Group
- Sample size
 - 1% accuracy rate with assumption that missing rate would be 10% or less = 6,000 titles per library – 240,000 total
 - Random sample drawn from extracts provided to SCS

The Data Collection Tool

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?

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

<https://github.com/samato88/EastValidationTool>

Checking the Shelves



97% availability

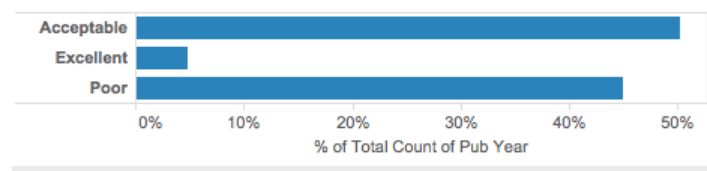


90% average or better condition

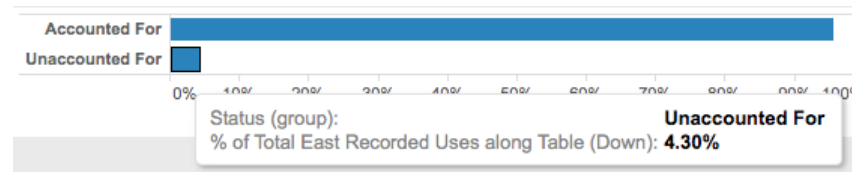
Next Steps

- Further data analysis:

Items publisher pre-1900 are in poorer condition:



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



Some final thoughts

Matthew Sheehy
Interim University Librarian
Brandeis University

Data

- Will this support collective collecting?
 - Necessity
 - Obstacles
- An opportunity. What relationships already exist we do not know about.
 - Is there already something we don't know about?



Changes in resources

- Changes to collection development and resources
 - New skills in our resource management groups
- Focus on unique and special collections
 - Who buys the content that will enter the cannon in the future?
 - Is there such a thing as altruism?
 - Business opportunity?
- Will we be able to count on our vendors as partners?
 - Libraries want partners
 - Vendors need to see margins



Effects on scholarship

- Access over ownership
 - Rankings
- How this effects various disciplines
 - Liberal Arts
 - STEM
- Who this effects
 - Current faculty
 - Current students
 - Those not even in college yet



Is this just a preservation effort?

Thank You

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Thank you.

Q & A

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