

EAST Membership Update Webinars – August, 2017

Wednesday, August 23rd: 10am-11am

Thursday, August 24th: 2pm-3pm

Monday, August 28th: 11am-12pm



BLC

BOSTON LIBRARY CONSORTIUM

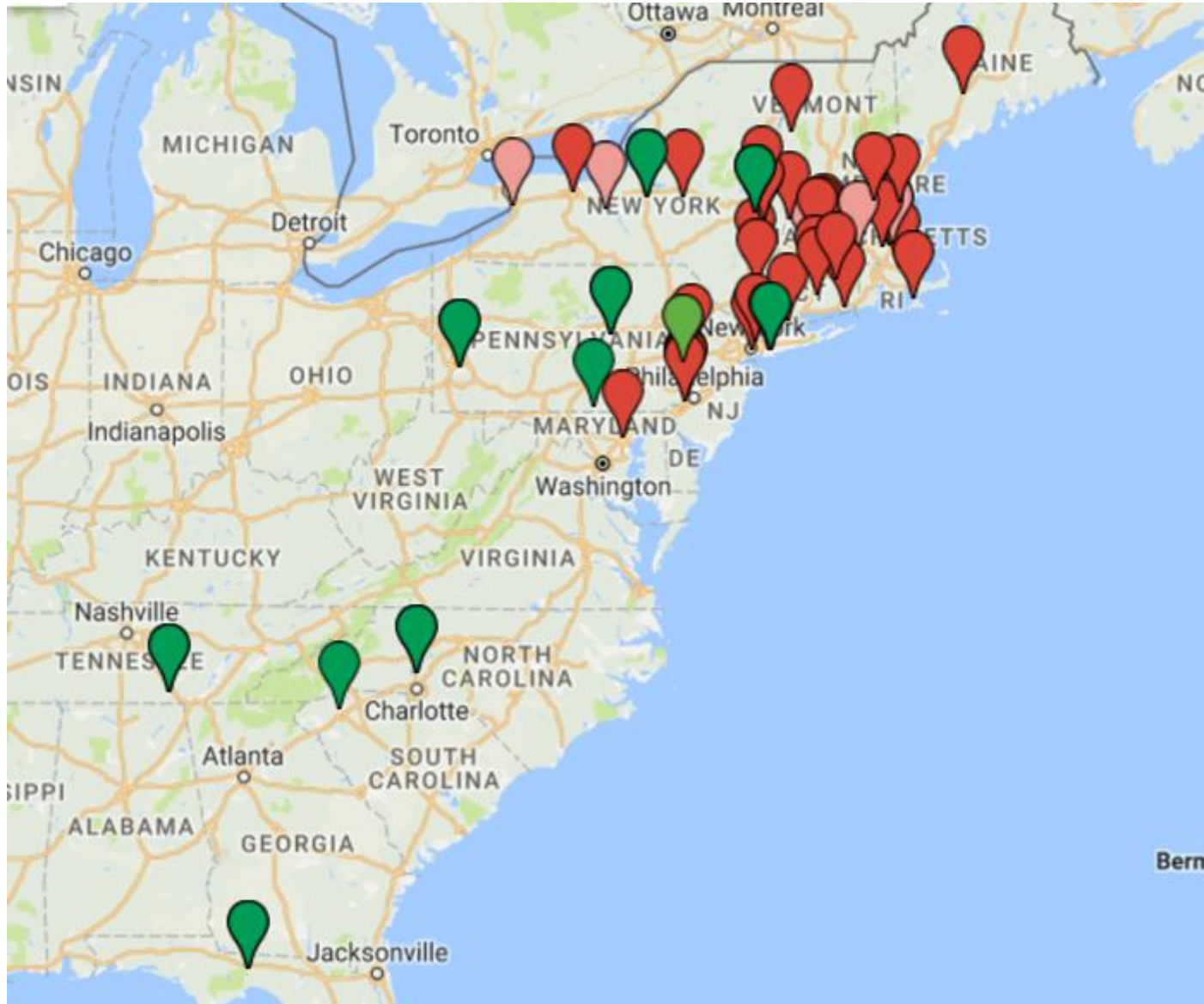


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Our Agenda

Update on EAST Interlibrary Loan – Susan
Member Meeting – October 13th – Susan
EAST Executive Committee fall elections – Susan
Serials and Journals Working Group – Matthew
Cohort 2 Update – Matthew
Registering Retention Commitments in OCLC – Susan
Reallocation of Retention Commitments – Sara
Shared Print Monograph Collaboration Summit - Susan



Just a reminder
that we are now 60
libraries strong with
our Cohort 2
Partners!

EAST Interlibrary Loan Update



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Adding EAST to the OCLC Policies Directory

- Recommended by the ILL Working Group
- Standard way for EAST libraries to specify their lending policies to other EAST libraries – for loans and copies
- Thanks to David Perry from Bryn Mawr for drafting documentation
- You will be seeing an email from Mei with a link to the documentation
- If already familiar, go to <https://illpolicies.oclc.org/dill-ui/SignIn.do> and select “Policies” to create your entry



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The EAST Rapid Pod

20 of the EAST Cohort 1 libraries have joined the EAST Rapid Pod

Boston College
Boston University
Brandeis University
Bryn Mawr College
Hamilton College
Hobart & William Smith Colleges
Lafayette College
Loyola Notre Dame
Middlebury College
Siena College

Skidmore College
Swarthmore College
Tufts University
University of Mass. Amherst
University of Mass. Boston
University of Mass. Dartmouth
University of Connecticut
University of New Hampshire
University of New Hampshire-Manchester
Wellesley College
Williams College

To join: contact Mike Richins at mike.richins@colostate.edu

EAST Member Meeting



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EAST Member Meeting

- When: Friday, October 13 from 10:00am to 3:30pm
- Where: Metro Meeting Centers, Boston, MA
- What: Full meeting of EAST members for:
 - update on activities and celebrate accomplishments
 - opportunity to network and meet the EAST Project Team as well as Cohort 1 and 2 Partners
 - learn more about ways you can maximize your membership in EAST
 - advance discussions on next steps for EAST
- Online registration now open – <https://www.surveymonkey.com/r/2SK2RCH>
- Portions may be broadcast using Go to Webinar



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EAST Member Meeting – Draft Agenda

- 9:00 – 10:00am – Breakfast and registration
- 10:00 – 10:05 – Welcome
- 10:05 – 10:45 – General update on EAST activities
- 10:45 – 12:00pm – Breakout sessions
 - Cohort 2 and the Collection Analysis Working Group – introduction to GreenGlass
 - Serials/Journals Working Group
 - Planning for the Shared Print Monograph Summit
- 12:00 – 1:00 – Lunch
- 1:00 – 1:30 – Dessert and activity



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EAST Member Meeting – Draft Agenda

- 1:30 – 1:45pm – EAST Commendations
- 1:45 – 2:15pm – Lightning Talks on EAST Member Projects
- 2:20 – 3:00pm – Panel on Leveraging your EAST data
- 3:00 – 3:30pm – Next Steps for EAST

Accommodation information is available via the EAST homepage:
www.eastlibraries.org

Executive Committee Elections

EAST Executive Committee Elections

- Four seats open for election in October:
 - Retention Partner representing Small Collections (less than 300,00 volumes)
 - Retention Partner representing Medium Collections (from 300,000-999,000 volumes)
 - Retention Partner representing Large Collections (larger than 1 million volumes)
 - Supporting Partner
- Incoming EC members will serve for a period of three years.
- Members meet virtually for one hour/month and review documentation as needed outside of meeting hours.



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About the Executive Committee

The Executive Committee (EC) appoints working groups and committees that facilitate and move forward the project's mission.

The EC evaluates and approves retention models, expenditure of EAST funds, and prospective new members.

Members of the EC are expected to understand the landscape of contemporary academic library issues as they relate to collections, resource sharing, and access.

Deadline for nominations: September 21st

Serials & Journals Update



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Cohort 1 Serial & Journal Retention Partners

- Amherst College
- Bard College
- Boston College
- Boston University
- Brandeis University
- Connecticut College
- Elms College
- Fairfield University
- Five Colleges, Incorporated
- Hamilton College
- Lafayette College
- Loyola Notre Dame
- MBLWHOI
- Mount Holyoke College
- Siena College
- Smith College
- Swarthmore College
- Trinity College
- Tufts University
- Union College
- University of Massachusetts Amherst
- Williams College



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Serials & Journals Working Group Charge

Working Group formed in December 2016 which is tasked with making recommendations to the Executive Committee regarding:

- Scope of collection analysis for serials and journals
- Retention selection criteria
- How the collection analysis will happen
- How retention will be assigned/allocated
- How commitments will be disclosed
- Identify additional operating policies and procedures documentation



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Serials & Journals Working Group Roster

- **Palash Bosgang**, Bard College
- **Martha Gunnarson**, Worcester Polytechnic Institute
- **Melodie Hamilton**, Connecticut College
- **Sally Krash**, UMass Amherst
- **Missy Laytham**, Loyola Notre Dame Library
- **Kathleen Norton**, Mount Holyoke College
- **Nina Peri**, Fairfield University
- **Matthew Person**, MBLWHOI
- **Peggy Seiden**, Swarthmore College
- **Steve Smith**, Boston University
- **Barbara Swetman**, Hamilton College
- **Sally Wyman**, Boston College

Project Team members:

- **Matthew Revitt (Chair)**
- **Sara Amato**
- **Mei Mendez**
- **Susan Stearns**



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Collection Analysis Support

- EAST contracted with the Center for Research Libraries (CRL) for data comparison services.
- By mid-June all 22 Retention Partners had submitted holdings data to CRL.
- Quick turnaround on first set of CRL data reports - late June.



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CRL Collection Comparison Reports

CRL provided reports at both the group and individual library level:

- **Individual:** Overview of record totals & errors AND ISSN de-duplication
- **Group:** LC classifications, publication, country, and language.

Most useful for purpose of the Working Group was the report of the number of holdings per title among EAST libraries. i.e. the levels of “rareness” within the group



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Retention Recommendations

- The Working Group analyzed holdings overlap data using Tableau views and agreed on the following recommendations:
 - Focus on “medium-rare” titles as a first step: those held by 4-6 EAST Serial and Journal Retention Partners (approximately 8,000 titles)
 - Retain up to 3 holdings of the titles
 - Libraries with the most complete runs of retained titles will be allocated retention responsibility
 - Do not include: gov docs, newspapers, non-print material (e.g. microfilm and microfiche), and titles available in JSTOR



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Approval of Recommendations

As of August 22nd the retention recommendations have been approved by both the Voting Members of the Serial & Journal Retention Partners and the EAST Executive Committee.

Next Steps

1. CRL will apply retention rules to EAST data and produce reports containing retention candidates for each library.
2. Retention Partners review retention candidates and have the opportunity to reject retention commitments (similar to monograph process).
3. Retention commitments are recorded in ILSs and joint discovery system. EAST will be issuing guidance on this step.

The Working Group will move on to consider other categories of titles. Feedback from Voting Members is that we should look at rarely held titles.



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FAQ for Serial & Journals

- As with monographs, libraries are expected to retain titles for a minimum of 15 years, with the retention date being the same: through June 30, 2031.
- Titles should be retained in line with the EAST MOU and agreed upon [EAST policies and procedures](#), including that “where possible, delivery will be made through scanning and digital delivery”.
- Retention agreements will be reviewed every five years.



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Cohort 2 Update



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Cohort 2 Libraries

- Bucknell University
- Davidson College
- DeSales University
- Florida State University
- Furman University
- Gettysburg College
- Hofstra University
- New York University
- University of Pittsburgh
- Syracuse University
- Union College
- University of the South
- Villanova University – Supporting Partner
- University of Massachusetts Medical School Library -- Serials Retention Partner



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Collection Analysis Working Group

- **Sarah McCleskey**, Hofstra University
- **Jeremy Garskof**, Gettysburg College
- **Dan Heuer**, Bucknell University
- **Janet Pease**, Syracuse University
- **Fern Brody**, University of Pittsburgh
- **Raik Zaghloul**, Union College
- **Jessica Denke**, DeSales University
- **Penny Cowan**, University of the South
- **Bill Maltarich**, New York University
- **Lorri Huddy** [Cohort 1 Rep.], CTW
- **Jen John**, SCS
- **Ruth Fisher**, SCS
- EAST Project Team: **Sara Amato**, **Matthew Revitt**, **Mei Mendez** & **Susan Stearns**



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Working Group Charge

Make recommendations to the EAST Executive Committee regarding selection criteria for retention proposals, services among EAST members, and policies.

Participate in the review of collection analysis reports and will serve as the primary body to define the final selection criteria for proposing retention candidates.



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Progress to Date

- Agreed on 5 groups which the EAST Cohort 2 collective collection will be compared with:
 - EAST Cohort 1 Retention Commitment holdings
 - EAST Cohort 1 all circulating print monograph holdings
 - Regional large academic libraries
 - Regional small to medium academic libraries
 - Ivy Plus
- Agreed to reuse Cohort 1 “ephemera” list to flag works that aren’t appropriate for long-term retention, with one addition -- “Dummies” series

All bib and item data has been submitted by
Cohort 2 libraries!



Project Timeline: 2017 - 2021

Task	Date
Kick-off Meetings	June 5 -12
Cataloging and data questionnaires completed	June 30
Comparator libraries finalized and special category defined	July 30
All bib and item data received from libraries	August 18
Random lists of items for validation study	October 15
GreenGlass loaded	October 20
Consensus reached on retention model	December 22
GreenGlass reloaded to reflect retention candidates	February 5, 2018
Retention review and rejected allocations reported to SCS	March 2, 2018
GreenGlass reloaded with FINAL retention commitments	March 26, 2018
Separate instance of GreenGlass dedicated to retentions	April 23, 2018
Ongoing access to GreenGlass	January 31, 2021



Validation Sample Study

- A small **sample study** to determine an “availability metric” that provides a rough estimate of the percentage of library holdings that are likely to be available (are accounted for). This will be used by the Collection Analysis Working Group as one factor in determining how many copies to retain.
- Each library will receive a list of 6,000 titles randomly selected from the in-scope records that were sent to SCS. Libraries will check shelves to determine availability, and perform a quick condition assessment of the items using a data collection tool developed by EAST.
- EAST Project Team is in the process of appointing a Validation Study Working Group who will begin work in September.
- Training in early October; Study runs mid-October - mid-December

Benefits of Cohort 2 work for Cohort 1 members

- Additional retention commitments from Cohort 2 Retention Partners will ensure more scholarly content is protected.
- Cohort 1 libraries can consider withdrawing local copies of titles retained by Cohort 2 libraries.
- Expanded access network beyond northeast region.
- Additional member monies that can be used for future EAST projects.



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Registering Retention Commitments in OCLC



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Registering EAST Retention Commitments in WorldCat®

- OCLC shared print monograph registration service now included, at no additional cost, as part of the standard cataloging service subscription
- Service in beta testing with general release anticipated in November
- As there is no Group registration capability in this initial release, we will be working closely with individual libraries in Cohort 1 to ensure accurate registration of their commitments
 - Stay tuned for details – likely in late November/December
- Cohort 2 commitments will likely be registered more directly from SCS, but still awaiting details



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Reallocation of Retention Commitments



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Reminder: FAQ / Reallocation Requests

Help! We've:

- lost a book

- found mold

- had water damage

....

<https://eastlibraries.org/frequently-asked-questions-about-retention-commitments>



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Reallocation Requests - 2018 / 2019

Reallocation requests made prior to December 2017, any titles available in the EAST Cohort 2 libraries will be reassigned there.

For 2018, EAST will follow a semi-annual schedule of retention reallocations.

Process reevaluated in 2019 for sustainability/functionality

At any time during the calendar year		Requests for reallocation may be submitted at any time by providing the EAST Project Team with a list of OCLC numbers.
May 1st	Nov 1st	EAST Project Team reminds member libraries of June/December 1st deadline to submit reallocation requests.
June 1st - 15th	Dec 1st - 15th	EAST staff determines which titles have surplus copies in EAST for potential reallocation.
June 15th - July 31st	Dec 15th - Jan 31st	Operational Contacts at EAST libraries holding surplus copies are provided lists of potential additional retention requests. Libraries have 6 weeks to examine the lists and respond if they are able to take on the additional retentions. Libraries are then responsible for recording retention commitments on these titles in their ILS and WorldCat (when available). The EAST Project Team will update the EAST Retention Database.
August 1st	Feb 1st	Libraries who submitted requests for retention reallocation are informed of the results.

Shared Print Monograph Collaboration Summit



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Shared Print Monograph Collaboration

- No-cost extension of Mellon funding included convening a Summit on collaboration and cooperation across shared print monograph programs in the US (and possibly Canada)
- Shared print monograph planning group began meeting at ALA Annual and is continuing to plan the agenda and determine the participants
- Maureen Sullivan will act as facilitator
- Report will be generated and made available to EAST members as well as to Mellon as part of the EAST final report



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Shared Print Monograph Collaboration

- Discussion topics being considered from the agenda
 - What is the corpus of content we have a shared interest in stewarding?
 - What is essential to an entity that could enable collaboration in our efforts to steward this corpus?
 - What are the most critical priority areas that such an entity should address?
 - What are the priorities for next steps?



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Shared Print Monograph Collaboration

- Shared print monograph planning group:
 - EAST Project Team – Susan, Matthew, Mei and Sara
 - Bob Kieft and Rick Burke – SCELIC
 - Randy Dykhuis – MI-SPI
 - Kirsten Leonard – PALNI/ALI
 - Galadriel Chilton – Ivy Plus
 - Jeff Kosokoff – Ivy Plus and North Carolina group
 - Lizanne Payne – HathiTrust
 - Tara Fulton and Patrick Carr, co-PI's on EAST Mellon grant



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Thank you.

Q & A



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