

EAST Member Update

Wednesday Jan. 16th, 2019: 10:00-11:00 a.m.

Tuesday Jan. 22nd, 2019: 2:00-3:00 p.m.

Wednesday Jan. 23rd, 2018: 10:00-11:00 a.m.

EAST Project Team

Topics to cover

- Update on monograph work – Sara Amato
- Serials and Journals work – Matthew Revitt
- Updates on the EAST Executive Committee – Susan Stearns
- The EAST Summit on Monograph Shared Print in December and formation of the Partnership for Shared Book Collections – Susan
- EAST website updates – Mei Mendez
- Onboarding documentation, the new EAST poster – Mei
- THANKS YOU's – Mei

Note: Both Sara Amato and Matthew Revitt will be presenting at the Print Archive Network (PAN) Forum at ALA Midwinter.

Monographs Update



- Access continues through January 31, 2021
- A Combined instance of GreenGlass loaded with retention commitments FOR SEARCHING COLLECTIVE COLLECTION ONLY - Contact mmendez@blc.org for login.
- SCS Webinar highlighting uses of GreenGlass
<https://eastlibraries.org/news-events/greenglass-east-members>

Monographs Update



Keyword Search added to Cohort 2 and Retention Instances



Collection

Analysis

EAST Retentions 2018

OVERVIEW

VISUALIZE

REMEDIATION

KNOWN ITEM SEARCH

Search for:



WorldCat OCLC #



Bib Record #



Barcode #



OCLC Work ID #



Keyword



SUBMIT

New Query

[← QUERY](#)

SUBJECTS

- ☒ All subjects
- ☐ Specific LC classes

CALL NUMBERS

- Call Number
- No restriction
- ✓ Starts with
- Includes
- Ends with

NUMBER

HIDE EDITOR



■ MATCHED
122,279

■ UNMATCHED

0% | 0

■ MATCHED

40,000

Monographs Update: Retentions Database

OCLC Number: [371050](#)

TITLE: The Latin-American mind. Translated from the Spanish by James H. Abbott and Lowell Dunham.

EAST Retentions: 3

Retained by: [Adelphi University](#), [Bridgewater](#), [Mount Holyoke College](#)

Digital Surrogates: [Hathi In Copyright](#) [Internet Archive](#)

Available on the EAST website - <https://eastlibraries.org>

Monographs Update: Reallocations

Libraries agree to replace lost or damaged retentions when possible

Reallocation requests for Jul-Dec 2018: 4,730

Mostly due to missing items discovered during inventories

You may receive requests to retain material in February

ILS changes?

Monographs Update: Registering EAST Retention Commitments in WorldCat®



Shared Print Registration Service
Spring 2020

Validation Sample Study

[Home](#) > [Collaborative Librarianship](#) > [Vol. 10 \(2018\)](#) > [Iss. 3](#)



Documenting the Stewardship of Libraries: The Eastern Academic Scholars' Trust Validation Sample Studies

[Sara Amato](#), *Eastern Academic Scholar's Trust*

[Follow](#)

[Susan Stearns](#), *Boston Library Consortium*

[Follow](#)

Abstract

The Eastern Academic Scholars' Trust ([EAST](#)), a regional shared print collaboration of sixty academic and research libraries, conducted validation studies of the collective monograph collection in 2016 and 2017. Methodology, results and limitations of the studies are presented along with thoughts on further research areas.

Recommended Citation

Amato, Sara and Stearns, Susan (2018) "Documenting the Stewardship of Libraries: The Eastern Academic Scholars' Trust Validation Sample Studies," *Collaborative Librarianship*: Vol. 10 : Iss. 3 , Article 4.

Available at: <https://digitalcommons.du.edu/collaborativelibrarianship/vol10/iss3/4>



- Rosemont Access Principles have now been approved by all 5 member programs -- working on forming a Rosemont OCLC GAC & Rapid Pod
- EAST FAQ updated to explain the ramifications of Rosemont membership for EAST Serials and Journals Retention Partners (also inc. other details of S&J work)
<https://eastlibraries.org/frequently-asked-questions-about-retention-commitments>



- Rosemont Executive Committee met in person on October 31st and approved revised roadmap & participation document
- Congratulations to EAST's own Peggy Seiden (director of Swarthmore College Library) who was appointed chair of the Rosemont Executive Committee for 2019!
- Rosemont Operations Committee working on implementing roadmap goals: collection growth (100k new titles), last copy initiative, and decision support

C2 “Medium Rare” Titles Retention Model

End of October, these retention rules for Cohort 2’s “medium rare” titles were approved by Voting Members & the Executive Committee:

- Retain up to 3 holdings of titles held by 4-6 EAST Serial & Journal Retention Partners
- Only Cohort 2 libraries will be allocated retention responsibility
- Titles with an existing EAST commitment from Phase 1 won’t be allocated for retention
- **Titles with an existing commitment at a Rosemont member library won’t be allocated for retention**
- Libraries with the most complete runs of retained titles will be allocated the retention commitments

Approximately **4,000** titles meet this criteria

Cohort 2 Retention Lists & Recording Commitments

- CRL have completed applying retention rules
- Retention proposals will be distributed to the Cohort 2 Libraries by 1/24, along with guidance for reviewing lists & carrying out optional shelf checks to validate title holdings
- Deadline of **March 15th** to confirm titles agree to retain for EAST
- Sara Amato will work with libraries and CRL on recording commitments in PAPR
- Guidance available in the Member Resources area of <http://eastlibraries.org/> for recording commitments locally

Recording S&J Commitments in



Currently not available, but EAST Project Team & Rosemont OC still in regular contact with OCLC & CRL regarding their Mellon supported collaboration to support improvements in the WorldCat infrastructure for managing shared print collections.



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“Widely-Held” Titles Retention Model

In December, these retention rules for “widely-held” titles were approved by Voting Members & the Executive Committee:

- Retain 3 holdings of titles held by 7-28 EAST Serial & Journal Retention Partners
- Both cohort Cohorts 1 & 2 libraries will be allocated retention responsibility
- Titles with an existing EAST commitment from Phase 1 won’t be allocated for retention
- Titles with an existing commitment at a Rosemont member library won’t be allocated for retention
- Libraries with the most complete runs of retained titles will be allocated the retention commitments

Approximately **700** titles meet this criteria. Expect to distribute retention proposals in **February** with a deadline of **April 15th** to confirm titles

EAST Serial & Journal Retention Partners

- Amherst College
- Bard College
- Boston College
- Boston University
- Brandeis University
- Connecticut College
- DeSales University
- Elms College
- Fairfield University
- Five Colleges, Incorporated
- Hamilton College
- Hofstra University
- Lafayette College
- Loyola Notre Dame
- MBLWHOI
- Mount Holyoke College
- New York University
- Siena College
- Smith College
- Syracuse University
- Swarthmore College
- Trinity College
- Tufts University
- Union College
- University of Massachusetts Amherst
- UMass Medical Library
- University of the South
- University of Pittsburgh
- University of Rochester
- Vassar College
- U.S. Coast Guard Academy
- Williams College



Current Retention Numbers

EAST libraries have collectively agreed to retain approximately 11,000 titles (5,400 unique OCLC numbers) serial & journals titles!

Corpus of Scarcely-Held Titles

Scarcely Held

- * Held by 1-3 Libraries (both cohorts)
- * Not Retained by Cohort 1
- * Not in Rosemont

77,352 Title Sets

94,921 Title Holdings



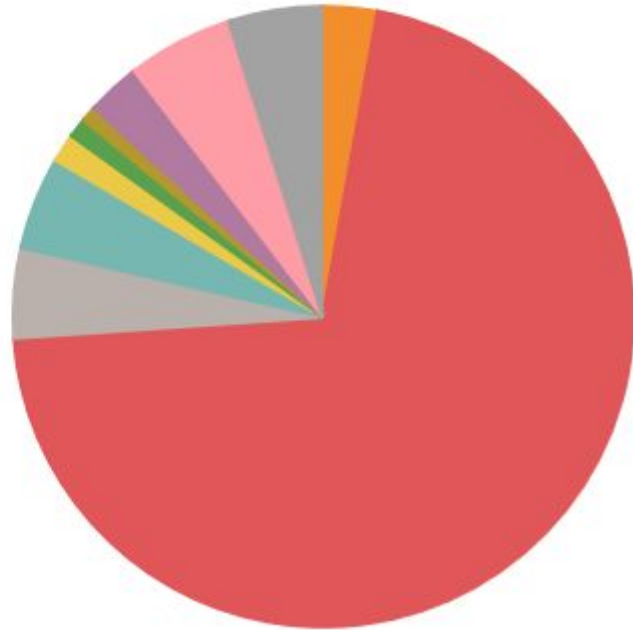
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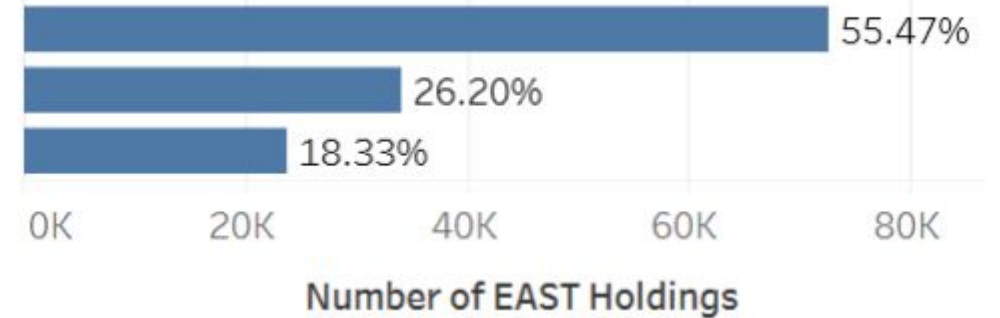
Overview of Scarcely-Held Titles

Languages

Language Code (group)

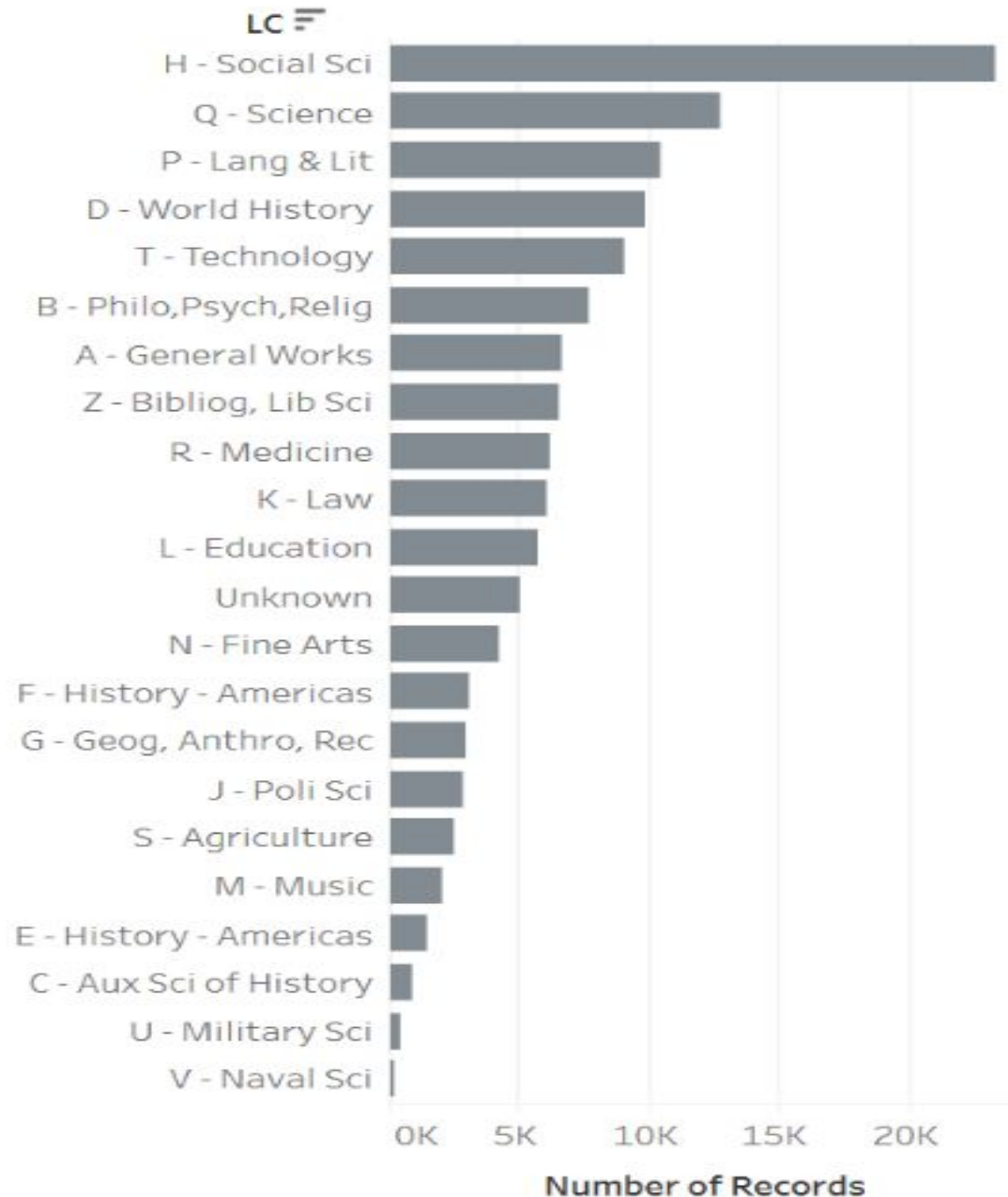


Scarcely Held



Majority of the titles are in English & 55% are held by only one EAST library

Overview of Titles Held by 1-3



Breakdown of the scarce
titles by LC Class



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Scarcely Held | Scarcely Held Title Lists | LC | Overview held by 1-3 | _

Scarcely Held

- * Held by 1-3 Libraries (both cohorts)
- * Not Retained by Cohort 1
- * Not in Rosemont

63,649 Title Sets
72,926 Title Holdings

Library	No. Titles in Library	TOTAL EAST Holdings
Amherst	3,542	4,382
Bard	21	30
Boston College	3,919	5,133
Boston University	4,956	6,355
Brandeis	3,266	4,017
Coast Guard	75	83
Connecticut College	367	498
DeSales	15	21
Elms	182	182
Fairfield	19	26
Five Colleges	3,864	5,169
Hamilton	544	852
Hofstra	46	57
Lafayette	369	524
Loyola	52	71
Mount Holyoke	669	1,053
NYU	1,034	1,268
Rochester	7,614	10,099
Sewanee	659	898
Siena	33	50
Smith	3,799	5,087
Swarthmore	54	84
Syracuse	5,342	7,440
Trinity	315	458
Tufts	691	976
UMass Amherst	5,952	8,256
UMass Medical	257	281
Union	188	289
University of Pittsburg	22,107	26,150

+ a b l e a u

WorldCat Holdings



WorldCat US Holdings



Majority of these titles
are also scarce in OCLC
WorldCat

Investigating Retention Scenarios for Scarcely-Held Titles

Serials & Journals Working Group discussions so far indicate unlikely to be one universal retention model. Instead different options:

- Libraries with relatively small numbers of titles volunteer commitment without the need for further filtering
- Volunteer commitments to titles in specific LC subjects where there are local strengths
- Use Tableau filters to identify a subset of titles willing to make commitments to looking at factors like OCLC Holdings, subjects, language & commitments from other shared print programs

Thank You S&J Working Group Members

Palash Bosgang, Bard College

Penny Cowan, University
of the South

Lindsay Cronk, University of Rochester

Sarah Glasser, Hofstra University

Martha Gunnarson, WPI

Sally Krash, UMass Amherst

Missy Laytham, Loyola Notre Dame

Kathleen Norton, Mount Holyoke College

Nina Peri, Fairfield University

Matthew Person, MBLWHOI

Mary Piorun, UMass Medical

Peggy Seiden, Swarthmore
College

Steve Smith, Boston
University

Barbara Swetman, Hamilton
College

Sally Wyman, Boston College



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EAST Executive Committee

- The 2019 EAST EC Roster:
 - Anna Gold, WPI - through fall, 2020
 - Patrick Carr, UConn - through March, 2019*
 - Tara Fulton, UNH - through March, 2019*
 - Jennifer Bowen, U. Rochester - through fall, 2020
 - Fern Brody, U. Pittsburgh - through fall, 2021
 - Peggy Seiden, Swarthmore - through fall, 2021
 - Terry Simpkins, Middlebury - through fall, 2020**
 - Anthony Fonseca, Elms - through fall, 2020**

*New elections will be held for these 2 seats as the Mellon funding ends

**Elected as co-chairs of the EC in December, 2018



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EAST Summit

- December 5/6 in Boston
- Attended by 33 representatives of US and Canadian monograph shared print as well as thought leaders in shared print and print preservation
- Follow up to the April, 2018 Summit
- Reports back from the Working Groups
 - Organizational Structure
 - Open Data
 - Resource Sharing
 - Risk Research
 - Standards
 - Communications



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Agreements we reached

- Spend 2019 on transitioning to a new, federated organizational structure – tentatively named the “Partnership for Shared Book Collections”
- Vision: Ensure the long-term preservation, accessibility and integrity of monographic print resources
- Mission: Coordinate collaboration among shared print monograph initiatives and collections in North America to support cost-effective retention and access to shared print monograph collections
- A set of guiding principles for the federated organization

Other accomplishments

- Further engagement with possible vendors for provision of an open data infrastructure for shared print
- Brainstorming on various strategies for more effective outreach and engagement with stakeholder audiences
- Initial discussions on the relationship between the new Partnership and the Rosemont Alliance
- Agreement to engage with the Collaborative Approaches to Resource Sharing (CARS) group to ensure shared print issues are considered as new models for resource sharing evolve

Future work

- Steering Committee formed in late December to oversee work of ongoing Working Groups and includes
 - Lizanne Payne – Shared Print Consultant
 - Matthew Revitt – Maine Shared Collections
 - Caitlin Tillman – Downview, Canada
 - Ian Bogus – ReCAP
 - Heather Weltin – HathiTrust
 - Tina Baich – ALI
 - Kirsten Leonard – PALNI
 - Jeff Kosokoff – Duke University (an Ivy Plus Libraries member)
 - Susan Stearns, EAST

Working Groups

- Governance & Membership – Matthew to convene
- Services & Business Models – Kirsten to convene
- Open Data – Lizanne and Sara to co-convene
- Risk – Ian to convene
- Best Practices (formerly Standards) – Heather & Tina to convene
- Outreach & Engagement (formerly Communications) – Caitlin & Galadriel Chilton of the Ivy Plus Libraries to co-convene

Next: Report out at PAN at Midwinter and ongoing work

EAST Website

EAST website layout and content updated, including the FAQ.

Serials and Journals

Protecting serials and journals titles has been a key priority for EAST from its conception. Starting in 2016, a group of 21 EAST Serials and Journals Retention Partners agreed to participate in a project to analyze titles held across the group and agree on rules for which titles to retain for the EAST retention period of 15-years. To support this work EAST contracted in early 2017 with the [Center for Research Libraries](#) (CRL) to provide collection comparison reports.

The first phase of this analysis from 2017-2018 focussed on developing retention rules for titles held by 4-6 participating libraries. In 2018, a second phase of the project was begun starting with a group of a new cohort of 11 EAST Serials and Journals Retention Partners who agreed a set of retention rules for the titles they owned in the 4-6 holdings category. All 32 Serials and Journals Retention Partners have gone on to agree retention rules for more widely-held titles, those held by 7-28 participating libraries. EAST is currently focussed on agreeing retention rules for titles held by 3 or fewer participating libraries.

+ Phase 1 Project - "medium rare" titles

+ Phase 2 Project - "medium rare" titles

+ Phase 2 Project - "widely-held" titles

+ Phase 2 Project - "scarcely-held" titles

+ Retention Commitment Totals

Frequently Asked Questions about Retention Commitments

Below are some Frequently Asked Questions (FAQ) regarding retention commitments. Please be sure to also read the [EAST Major Operating Policies](#) and the [Operating Procedure: Replacing Lost or Damaged Items with Retention Commitments](#), as the information in these documents will answer many questions.

+ Access and Replacement

+ Retention and Transfers

+ Overlap with other programs


+ Government Documents

+ Serials and Journals



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Poster | Thank you!



The Eastern Academic Scholars' Trust works with academic and research libraries to safeguard print books and journals and provide access to them for scholars, students, and faculty.

Retained by Member Libraries as of January 2019:

- 6M+ Monograph Titles
- 9M+ Monograph Volumes
- 11K+ Serials Title Holdings

60+
Member Libraries

From the FAQ:

What does an EAST retention commitment mean?
A retention commitment means that the retaining library is committed to retain the title and provide access through June 30, 2031.* This includes replacing the title if lost or damaged.

How do I know what monographs are retained?
Retentions are recorded in your local ILS (most likely in a MARC 583 field), the EAST Retentions Database, and GreenGlass™.

**This date may be extended.*

EAST Members can:

- Borrow materials from their EAST partners, in most cases at no cost
- Withdraw titles that their partners have committed to retain
- Participate in the governance of EAST
- Access and use EAST member training materials and documentation
- Engage in regular update webinars and the annual membership meeting
- Contribute to the protection of the print record through regional and national collaboration.

"EAST offers essential assurances to our faculty that we are invested in the print record and ensuring its accessibility to current and future scholars."

--Anna Gold, University Librarian, Worcester Polytechnic Institute

Learn more at www.eastlibraries.org

Poster and onboarding documentation available on the EAST site:

www.eastlibraries.org/onboarding

For **Administrators**

For **Collection Managers**

For **ILL Librarians**

For **Tech Services Librarians**

Thank you.

www.eastlibraries.org



Education, Owl
graphics by Freepik,
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Logo Maker)



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