



## PAN Update -- June 2018

The Eastern Academic Scholars' Trust (EAST) is a shared print initiative involving 60 academic and research libraries in 11 states from Maine to Florida. EAST is focused on retaining unique, scarcely held and frequently used scholarly monographs and serials in support of scholarship, research and teaching. To learn more, please visit our website at [www.eastlibraries.org](http://www.eastlibraries.org)

### **Monographs**

#### Cohort 2

All EAST Cohort 2 libraries (which includes 12 Retention Partners) have agreed to their retention commitments and have recorded them in their ILS. The total number of retained volumes is 9,523,294. Detailed information about this shared collection is available to member libraries via a combined instance of GreenGlass, in addition to their individual data. In addition, we retain an EAST Retention Commitments Database, which is also being updated with Cohort 2 commitments. It is available here: <https://east-retention-db.appspot.com/>

#### Reallocation Process Overview

The earliest EAST retention data is already two years old, and some libraries have identified discrepancies in the data, lost or missing retained items, and circumstances in which they are unable to retain a previously committed title. In these instances, libraries can participate in a semi-annual reallocation process in June and December which aims to reallocate, when possible, a commitment from one EAST library to another. The reallocation process is detailed in an [online document](#), and will be revisited later this year by the EAST Operations Committee. Early lessons learned point to the need to clarify that the reallocation process is meant to serve as a last resort, and member libraries are expected to replace the item under retention unless there are extenuating circumstances, such as cost or market availability. This year, the Project Team issued its own reallocation requests to the Cohort 1 libraries, asking them to retain additional copies of titles that were reported as missing/damaged and could not be assigned to the Cohort 2 libraries.

#### OCLC Registration

After working with OCLC as a pilot library for the shared print registration service and determining that the service does not currently support registration of multi-part monographs (which account for almost 1 million EAST retention commitments), the EAST Executive Committee recommended that EAST hold off on registering commitments in WorldCat until such time as OCLC can provide a full service for all of its retention commitments. The only exceptions to this recommendation are the WMS libraries in EAST, which have not been able to record their commitments at all in their ILS. As of May, all EAST WMS libraries have begun the process of recording retentions and will be involved in discussions of how best to approach multi-part monographs. In the meantime, the [EAST Retentions Database](#) will be the most complete record of the EAST retained holdings.

### **Serials**

#### Cohort 1 and PAPER Registration

After working with Center for Research Libraries to analyze the collections of the 21 Cohort 1 Serials & Journals Retention Partners, we agreed to focus on medium rare titles. Cohort 1 Serials & Journals institutions signed off

on their retention commitments, [some] checked that their holdings matched their allocated commitments, and sent the Project Team spreadsheets with the updated titles and holding statements. EAST Data Librarian Sara Amato reviewed these spreadsheets and spent considerable time and effort in reviewing and normalizing the data prior to its submission to CRL for uploading into the PAPER Registry. To date, 2,720 titles of the over 9,000 holdings committed for retention have been uploaded.

These titles will be counted towards the combined retentions of the Rosemont Shared Print Alliance, which EAST formally joined in January 2018. EAST stakeholders are currently reviewing the Rosemont Access Principles to ensure they are inline with EAST policies.

### Cohort 2

A second cohort of 10 libraries have provided title and holdings data to CRL for another round of collection analysis and retention commitments, which will focus on overlap across all 31 Serials & Journals Retention Partners, including those widely-held. CRL has reviewed and normalized the data and will soon be providing the first of four reports that will be used by a working group to develop retention criteria and ultimately recommend a retention model. Based on lessons learned with Cohort 1, CRL prioritized the data review before generating collection reports, which we expect will lead to a smoother data analysis process for the participating libraries.

### **Summit**

In April, EAST hosted a Shared Print Monograph Summit, funded by the Mellon Foundation grant, to explore the ways in which collaboration across North American shared print programs could move forward the collective agenda. The Summit led to the establishment of working groups to explore the priorities identified during the two-day session. These working groups are exploring a set of priorities identified during the Summit that focus on risk research, open data, resource sharing, standards, communications, and an organizational structure for an entity to steer these priorities. A report on the Summit is being provided at the PAN Forum at ALA Annual. A summary of the Summit is available [here](#).

### **Next Steps for EAST**

The Mellon Foundation and Davis Educational Foundation grants that subsidized the collection analysis and other EAST activities will end in 2018. Since October of 2017, the Project Team and Executive Committee have discussed the ways in which EAST can move forward, capitalizing on the momentum built by three years of planning and operationalization. The EAST leadership [developed a document](#) that highlights the proposed direction for the project, and member libraries have been invited to provide their feedback. More discussion is expected at an upcoming face-to-face meeting of the EAST Executive Committee.

As EAST looks to the future, we are pleased to see that other initiatives are leveraging the EAST data and methodologies. Cornell University will be replicating the EAST validation sample study to examine rates of loss as they explore phasing out the use of tattle tape. And, EAST is in discussion with the [Book Traces project](#) at the University of Virginia to determine if there are ways to work together.