Onboarding Webinar for New Staff at EAST Member Libraries

November 16, 2023

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The EAST Project Team

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What is Shared Print?

Shared Print and Shared Print Programs are collaborations among libraries and groups of libraries to distribute the responsibility for protecting and preserving print collections, allowing partner libraries to repurpose library space while making available the program's collective collection to local faculty, students and scholars.

By working together, libraries can collect and maintain curated sets of print books and journals which are broadly useful and make them collectively available to readers.

What is Shared Print Infographic   Toolkit.SharedPrint.Org

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The EAST Mission

Securing the scholarly record in support of teaching, learning and research

Goals: Maximize retention commitments and facilitate access

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Some EAST Definitions:

Retention Partners: Dues paying member institutions who agree to keep and provide access to titles they were allocated to retain during their collection analysis process. Can be individual or consortia.

Supporting Partners: Dues paying member institutions who support and value the work of EAST but cannot commit to retain titles; they are represented in EAST's governance. Can be individual or consortia.
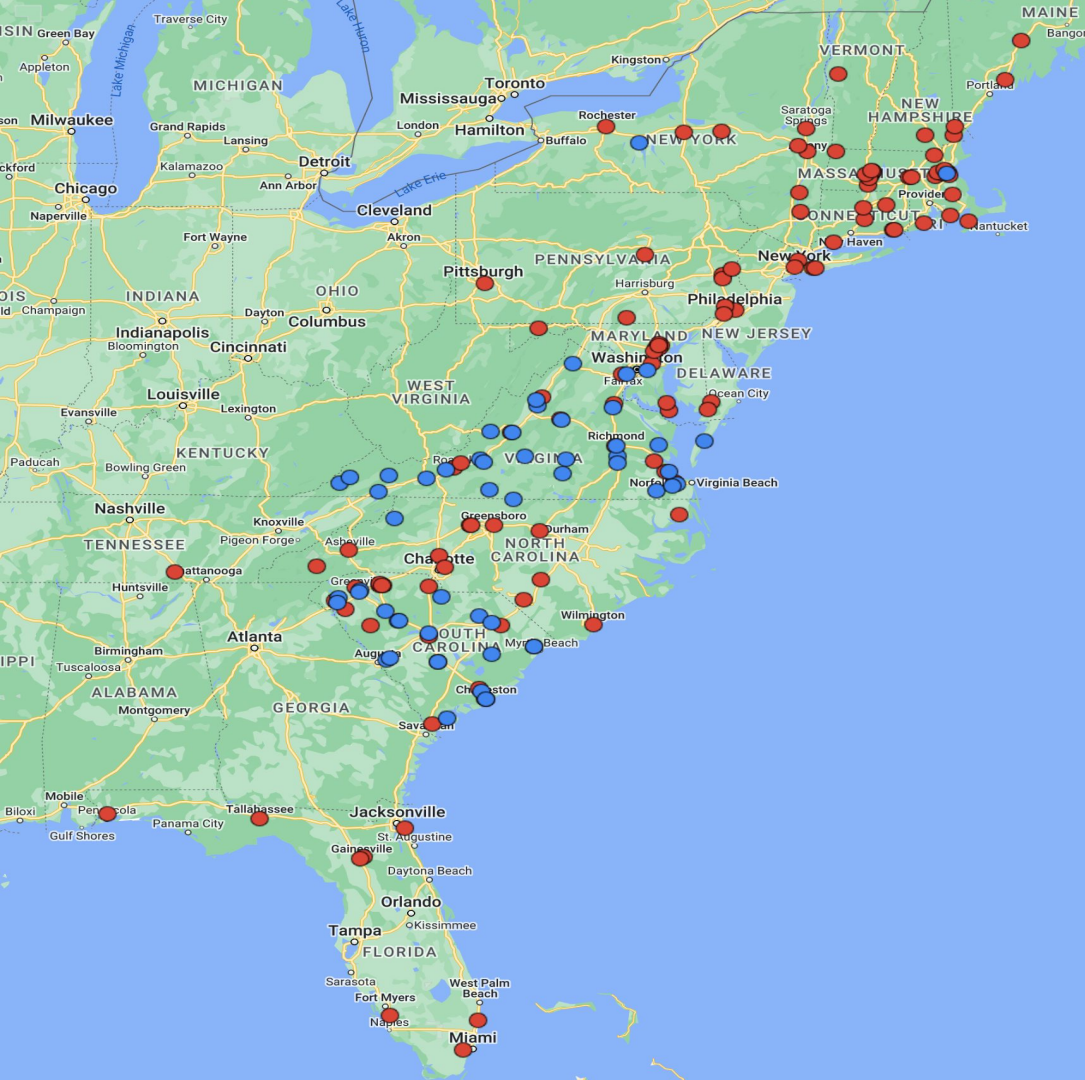
Retained/Retention Commitments: Titles libraries agree to keep and loan (or otherwise provide access to) in order to preserve the scholarly record.

Disclosure/Registration: The act of updating the records of retained titles by incorporating a "Committed to Retain" note in the MARC 583 field. This is done in the institution's ILS, in OCLC, and in PAPR (for serials/journals retentions) and facilitates discovery of shared print retentions. Marc records for retained titles are also loaded into Gold Rush which serves as an EAST Retentions Database.

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150+ Members in 15 States

Most are Monograph Retention Partners

32 Serials and Journals Partners

Over 10 million monographs currently retained and growing

Over 37,000 serials and journals currently retained

Retention commitments registered in WorldCat and the PAPR databases

Member of the Rosemont Shared Print Alliance

Founding member of the Partnership for Shared Book Collections

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The EAST Business Model

- EAST member libraries pay an annual membership fee based on collection size (at the time of joining). Consortia discounts are available when libraries join together.
- In addition to the annual operating budget, EAST maintains a reserve fund to facilitate subsidy of collection analysis work and support special projects approved by the Board of Directors.
- EAST began as a grant funded project sponsored by the Boston Library Consortium. EAST is now incorporated as a 501(c)(3) and an independent program.
- EAST staff work virtually with the Program Director who reports to the EAST Board of Directors

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Major Policies and Procedures

All of EAST's collection analysis and retention work is guided by the EAST Membership Agreement (MOU) which is signed by all member libraries.

Also on the eastlibraries.org website:
- General Governance Policies
- EAST Members' Rights and Responsibilities
- Major Operating Policies
    - Supplemented by documentation on replacing retention commitments for lost, missing or damaged items and Best Practices for Inter-Library Loan
    - Includes an FAQ on common questions relating to retention commitments

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EAST Governance: Your Opportunity

Board of Directors

- Governing body
- Nominated by the membership through their Voting Members
- Representative by type and size of library
- Staggered three year terms
- Includes two Executive Committees: Finance and Personnel

Operations Committee (OC)

- Charged with addressing issues relating to operationalizing EAST policies
- Nominated by the membership
- Representative by type and size of library
- Staggered two year terms

Working Groups – Ad hoc representative groups focused on specific aspects of a project – e.g. Resource Sharing Working Group.

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Monographs Collection Analysis and Retention Model

Retention Partners joining EAST carry out a collection analysis using one of two tools: GreenGlass (from OCLC) or Gold Rush (from the Colorado Alliance of Research Libraries). The first 60 libraries to join EAST used GreenGlass; since then some new members and consortia have preferred to use Gold Rush for their collection analysis.

During this process, libraries with support from the EAST Program Team:

- Load their MARC records into the tools (can include only circulating collections/locations).
- Compare their local records to the EAST collective collection of retention commitments to determine uniqueness and overlap resulting in a retention model for the library's collection.
- Review an initial allocations list that includes the titles they are asked to retain and finalize their local retention commitments.
- Register commitments in the appropriate databases.

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The EAST Monograph Retention Model

The retention model has evolved to reflect the size of EAST and to take into consideration the results of our validation sampling with Cohorts 1 and 2. The basic model is as follows, adapted to the tool libraries choose to use:

- Retain all scarcely held – includes unique titles and those with limited holdings in WorldCat (if comparison with WorldCat is feasible)
- Retain up to 5 of frequently used and to accommodate expanded geography
- Retain an additional copy of titles published pre-1900 (based on validation research on condition)
- Exclude "ephemera" and limited to titles published prior to 2011*

* To be updated with collection analysis work in 2023/2024

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Serials and Journals

- Thirty-two of the EAST members are Serials and Journals Retention Partners. Two retain serials titles only.
- The journal collection analysis was carried out with the support of the Center for Research Libraries, which worked with the EAST Project Team to develop a phased methodology to identify titles held by 4-6 participating libraries, then 7-28, and lastly, titles held by 3 or fewer libraries. This work yielded ~27K retained titles.
- Subsequent participation in the Rosemont Last Known Copy Initiative have increased this number to over 37K holdings.

Details of this work can be found in the EAST Serials & Journals Collection Analysis and Retention Modeling 2016-2019 document.
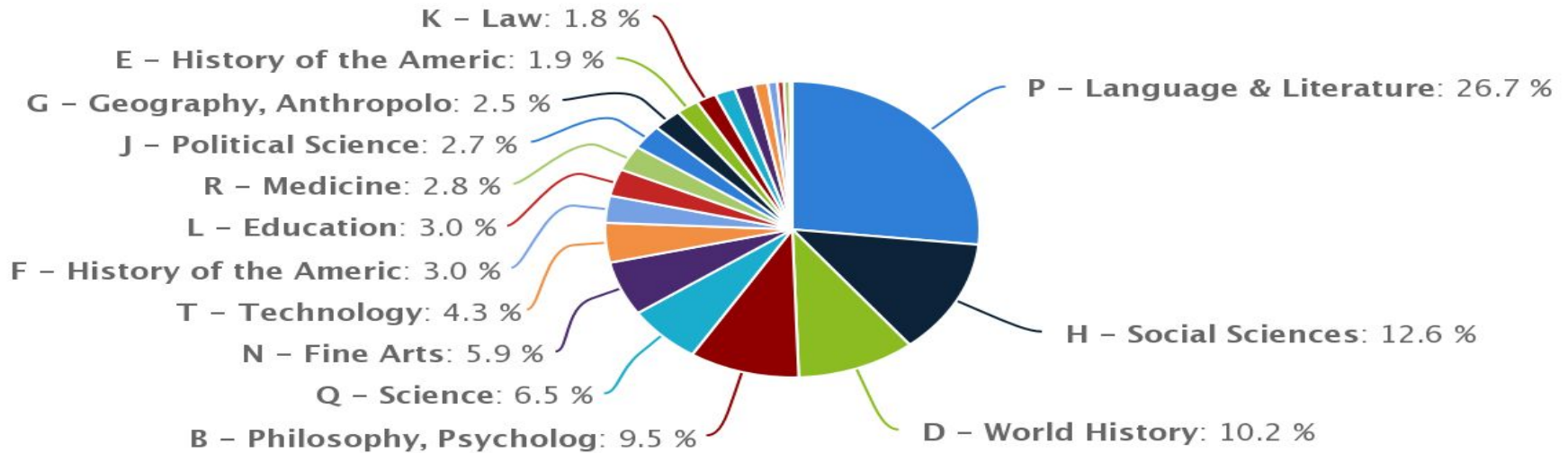
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EAST Collective Collection

LC call number facet

K – Law: 1.8 %
E – History of the Americ: 1.9 %
G – Geography, Anthropolo: 2.5 %
J – Political Science: 2.7 %
R – Medicine: 2.8 %
L – Education: 3.0 %
F – History of the Americ: 3.0 %
T – Technology: 4.3 %
N – Fine Arts: 5.9 %
Q – Science: 6.5 %
B – Philosophy, Psycholog: 9.5 %
P – Language & Literature: 26.7 %
H – Social Sciences: 12.6 %
D – World History: 10.2 %

Highcharts.com

Strategic Directions for EAST

- **Support the collection building and management strategies of member libraries**
  - Current progress: 2023 group wide collection analysis work
- **Ensure flexible and sustainable pathways to membership**
  - Current progress: New Consortia Supporting Partner model and work with SCELC on IMLS grant
- **Secure EAST's organizational sustainability**
  - Current progress: Incorporated as a 501(c)(3) in 2023, supported solely through membership dues
- **Expand opportunities for member libraries to contribute to the EAST collective collection**
  - Exploring self nominations

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Ongoing EAST Work

- Work with new consortia joining EAST, e.g. VIVA and PASCAL
- Complete group-wide collection analysis project - 2023/ early 2024
- Ongoing registration of new commitments in OCLC and PAPR
- Collaboration with the Partnership for Shared Book Collections (monographs) and the Rosemont Shared Print Alliance (serials/journals), particularly as they consider merging
- Creating an HBCU cohort as part of the IMLS grant funded work
- Exploring a Resource Sharing community of practice
- Exploring how to support lesser resourced members

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Recording Retentions in 583 field

Shared Print Programs use the 583 field to record retentions.

583 1b **|a** committed to retain |c 20160630 |d 20310630 **|f** EAST

|u http://eastlibraries.org/retained-materials **|5** MeWC

ILS-specific instructions on the EAST 583 Working Group website.

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ELMS COLLEGE

Report on the Church : Catholicism after Vatican II

Authors: Richard P McBrien

Print Book ©1992, 1st ed.

San Francisco : HarperSanFrancisco, ©1992.
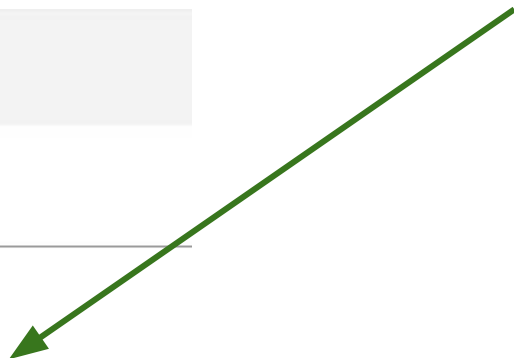
∧ Alumnae Library

Shelving Location	Call Number
Stacks	BX1390.M119
	Note: committed to retain

Make sure you know where to find commitments in your local ILS.

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Shared Print in OCLC

OCLC SHARED PRINT SOLUTIONS

Functionality across services

WorldShare® Record Manager

Edit Shared Print commitment

[Webinars on ways to register Shared Print and Working with Shared Print in OCLC](#)

https://help.oclc.org/Metadata_Services/Shared_Print

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Finding EAST Commitments

Monograph & Serial Commitments:

OCLC - Connexion, Record/Collection Manager, FirstSearch and various APIs. See "Functionality across services" doc.

Searchbox available from the homepage of eastlibraries.org - Data pulls from the OCLC API.

Gold Rush - contact Sara (samato@eastlibraries.org) if you need a login. Data is updated yearly.

GreenGlass - If your library maintains a subscription you can search EAST retention commitments in GreenGlass. Data is updated regularly.

Serials Commitments Only:

Print Archives Preservation Registry (PAPR)

Note that PAPR also hosts a Collection Comparison Tool which allows for an upload of a list of local record numbers to generate an instant comparison with the PAPR archived titles registry.

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Reallocation Process

Twice yearly call for libraries to request reallocation of retained titles that can no longer be retained (because they are out of scope - in which case the retention is removed and not reallocated - due to loss, change in lending status, etc).

Once a year, we send out to the libraries the lists of titles that have been requested for reallocation and which are held (but not retained) at other EAST libraries.

Libraries then let us know if they can retain those new titles and update their ILS and WorldCat accordingly. These changes would also be reflected in the annual Gold Rush data update request.

FORM for reporting Out of Scope and Reallocation Requests

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Resource Sharing through EAST

EAST Lending Network

[Resource Sharing Best Practices](#)

Most libraries lend at no charge

- Rapid EAST pod - for Rapid ILL and Rapid Returnables
- EAST OCLC GAC

ILL representation on the EAST Operations Committee

Looking into how to further enable and encourage discovery and access to the EAST "collective collection"

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Collection Analysis Update

- 67 EAST members participating in a group collection analysis project focused on securing commitments on newer monograph titles (acquired between 2011 and 2021).
- Holdings data for approx. 3.5 million titles currently being indexed in Gold Rush collection comparison tool.
- Anticipate starting the collection analysis work in late November/early December.
- Collection Analysis Working Group will be developing recommendations for what material should be prioritized for retention and how many copies of material should be retained across the EAST group.

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PARTNERSHIP FOR SHARED BOOK COLLECTIONS

17 Member Programs across 42 states and provinces representing 359 participating libraries

Coordinating collaboration for the protection of print books
A venue for sharing expertise, research, advocacy and work at scale
Focus on making shared print equitable, responsible, and sustainable

https://sharedprint.org/

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Partnership Initiatives

- Developed Shared Print Toolkit and Best Practices (ongoing)
- Communications recommendations concerning local weeding
- Risk research on optimal number of copies to retain
- Pilot research project with OCLC to investigate landscape of shared print in US and Canada, identify gaps and better understand subject and regional coverage
- Updating shared print metadata guidance
- Shared print presence in resource sharing tools & Alma
- Open retention data
- Merger with the Rosemont Shared Print Alliance

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ROSEMONT
SHARED PRINT ALLIANCE

Formed in 2015, as a collaboration of regional programs interested in coordinating their efforts on a larger scale to ensure the retention of and access to print journal backfiles.
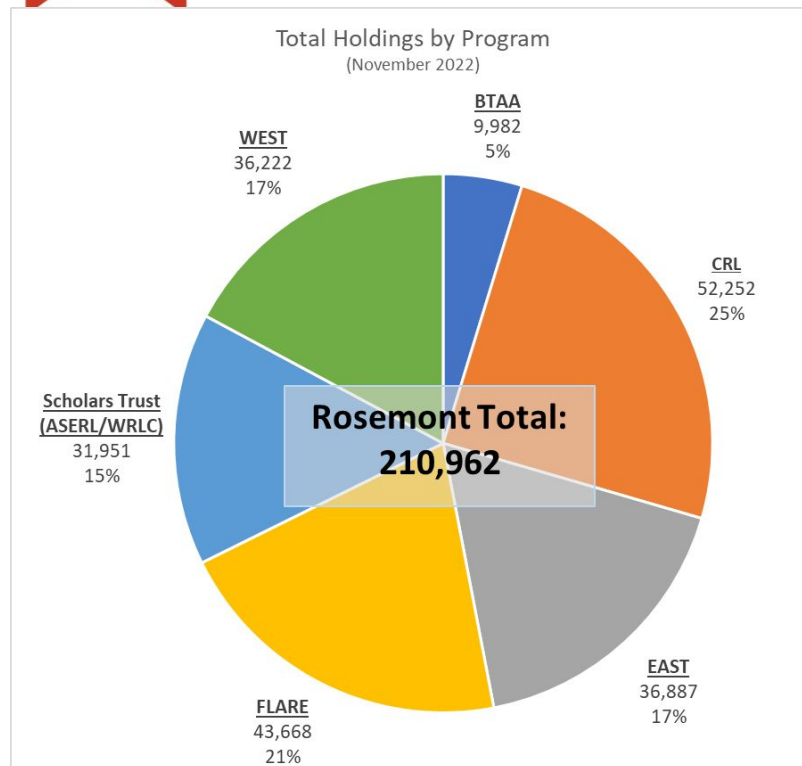
https://www.rosemontsharedprintalliance.org/

Total Holdings by Program
(November 2022)

BTAA 9,982 5%
CRL 52,252 25%
EAST 36,887 17%
FLARE 43,668 21%
Scholars Trust (ASERL/WRLC) 31,951 15%
WEST 36,222 17%

Rosemont Total: 210,962

Impact of Rosemont on EAST - Retention

- Reduce retention commitments for our members by excluding titles already committed by fellow Rosemont participating libraries
- Reciprocal retention agreement:

   "whereby all participants in the Rosemont Alliance agree and affirm that all holdings retained by their respective programs are also retained under the Rosemont Shared Print Alliance and, by definition, subject to the Rosemont shared policies or guidelines, including the Access Principles"

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Impact of Rosemont on EAST - Access

- Guaranteed access to over 210,00 titles retained by fellow Rosemont libraries

    "Participants agree to make Rosemont Alliance archived materials available to other Rosemont members. Archived material is eligible for lending to institutions outside of the Alliance per the holding library's lending relationships and policies."

- Last Copy Agreement to provide guidance to libraries about what to do when a last or scarcely held backfile is detected in a collection

https://www.rosemontsharedprintalliance.org/participating-libraries

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Impact of Rosemont on EAST - Advocacy, Shared Expertise & Tools

- Advocacy with OCLC & CRL on registration service for journal commitments & collection analysis tools
- Shared expertise e.g. recording commitments in ILS
- Communicating the value of shared print
- Access to online JRNL journal gap filling tool https://guides.uflib.ufl.edu/JRNL (cost covered by EAST)
- Supporting the development of the PAPR Collection Comparison Tool http://papr.crl.edu/tools/compare

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PAN, a free biannual forum for all things shared print print related.

Join the PAN listserv and view material from previous forums: https://www.crl.edu/programs/print-archive-network-forum-pan

Registration is now open for our next PAN forum happening (on Zoom) on **Friday, January 19th noon-2pm Eastern Time.**

Center for Research Libraries
GLOBAL RESOURCES NETWORK

Search CRL catalog

● catalog ○ website   browse catalog

Enriching research. Expanding possibilities. Since 1949.

About   Membership   Collections   Electronic Resources   Services   Archiving & Preservation   Collaborations

Archiving & Preservation

Overview

Digital Preservation ›

Print Preservation ▾

- Archiving by Domain
- ICON Database
- JSTOR Print Archive
- PAPR Database
- **Print Archive Network (PAN)**
- Contributing Serials to the Linda Hall Library

Print Archive Network Forum (PAN)

The Center for Research Libraries promotes opportunities for knowledgeable individuals at libraries and consortia to share information, expertise and best practices on the strategic management of print holdings. The Print Archive Network (PAN) Forums are venues for this kind of information sharing. The semi-annual PAN Forum has been held since 2009. It occurs the Friday morning before ALA's annual and midwinter conferences. Everyone with an interest in print archiving is welcome to attend and participate in the Forums.

PAN Event Lists and Materials

- The **CRL Event Index** lists all PAN events since 2010, as well as any scheduled future PAN events. PowerPoint presentations and reports on various U.S. and Canadian shared print and print archive programs, produced for past PAN Forums, are also available within this index.
- The **old PAN Meeting Archive** contains early discussions and materials leading up to the development of a North American print archives framework in 2010.

Contact: Marie Waltz (mwaltz at crl<dot>edu).

See also the CRL resources below related to Archiving and preservation

The Impact Of CRL

Stories illustrating CRL's impact on research, teaching, collection

Subscribe To PAN

First Name *

Last Name *

Email *

Learn more about the PAN Listserv

Subscribe

Recent Print Archive Network Forum (PAN) News

PAN Meeting Notes from Midwinter 2020

PAPR Database Enhanced

PAN Updates on Shared Print at ALA Annual Meeting

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Communications with EAST members

- EAST members email list - contact samato@eastlibraries.org to join or link from Onboarding page on website - eastlibraries.org/onboarding
- Operational contact, resource sharing contact, voting member, and billing contact(s) for each library or group
- Quarterly member update webinars and newsletter
- Annual member meeting
- Onboarding sessions as needed for new staff members
- Website: eastlibraries.org

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About Us ˅   Collection Analysis ˅   Retention & Access ˅   Policies & Documentation

Member Resources
Onboarding Documents, Best Practices...»

FAQ
Have a question? View our FAQ page! »

Upcoming Events

View recordings of previous events »

Skillman Library, Lafayette College
Lafayette College is a founding member of EAST.

Search the 10+ million EAST retention holdings

Search OCLC Number:

[ ] Search

About this search »

❞

"By creating a collaborative collection which elevates the concept of a library collection to scale above a single institution, shared print programs help research libraries to fulfill their mission to preserve the scholarly record in an era of changing usage, limited funding, and space constraints."

Onboarding Documentation

EAST has an abundance of documentation on the website, including onboarding documentation and information geared towards the following staff groups:

- Administrators
- Collections
- Resource Sharing, which includes links to the Best Practices
- Technical Services

*all these resources are available via eastlibraries.org/member-resources or directly at eastlibraries.org/onboarding.

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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), Gold Rush**, and OCLC's FirstSearch.

*This date may be extended.
**Ask the Project Team for login information.

The value of EAST

"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

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.

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Thank you.

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