

Onboarding Webinar for New Staff at EAST Member Libraries

November 13, 2025

11 a.m.



EAST

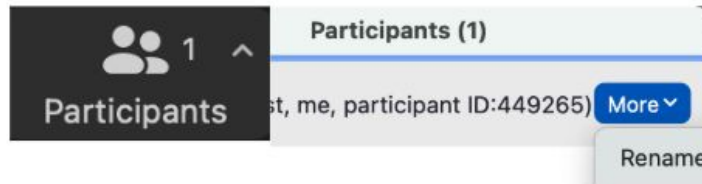
EASTERN ACADEMIC
SCHOLARS' TRUST

Housekeeping

Code of Conduct - <https://eastlibraries.org/code-of-conduct>



Please mute yourself



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Introducing the EAST Program Team



Tina Baich
Director
tbaich@eastlibraries.org



Sara Amato
Program Manager
samato@eastlibraries.org

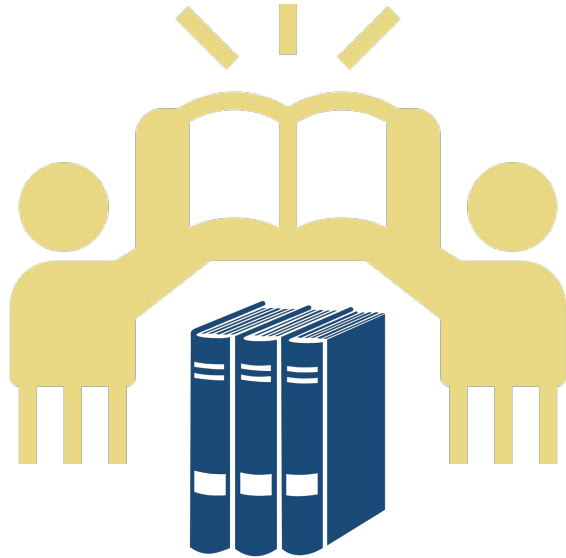


Matthew Revitt
Shared Print Consultant
matthew.revitt@maine.edu



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



What is Shared Print?

Shared Print and Shared Print Programs are collaborations among libraries to distribute the responsibility for maintaining collections, allowing partner libraries to reserve valuable space for materials that aren't available electronically, or for print items that are in high demand.



Over 23 million books retained!

That's around 3,276 miles of books which would reach from Maine to California.



More Space for You!

Sharing print copies between libraries means more space in libraries for other uses like meetings and technology.

It's not just books, libraries are preserving and sharing journals and magazines too.



Over 600,000 retained!

Shared Print Creates a Collective Collection

Collective collections combine the resources of libraries, creating more content for users to explore.



Keeping the Print

In an age of digital materials, shared print programs make sure the older rarer print materials stick around.

[What is Shared Print Infographic](https://en.wikipedia.org/wiki/Collective_collection)
from
[Toolkit.SharedPrint.Org](https://en.wikipedia.org/wiki/Collective_collection)

https://en.wikipedia.org/wiki/Collective_collection



EAST EASTERN ACADEMIC
SCHOLARS' TRUST

Brief History of EAST

- From grant-funded project to registered non-profit
- From 40 members in the Northeast to 190+ in 17 states
- From monographs to serials and journals
- From GreenGlass to Gold Rush



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

The EAST Mission

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



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

The Value of EAST

Changes the conversation on campus

Supports data-informed decision making

Gives members a strong voice

<https://eastlibraries.org/wp-content/uploads/Value-of-EAST.pdf>



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

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.

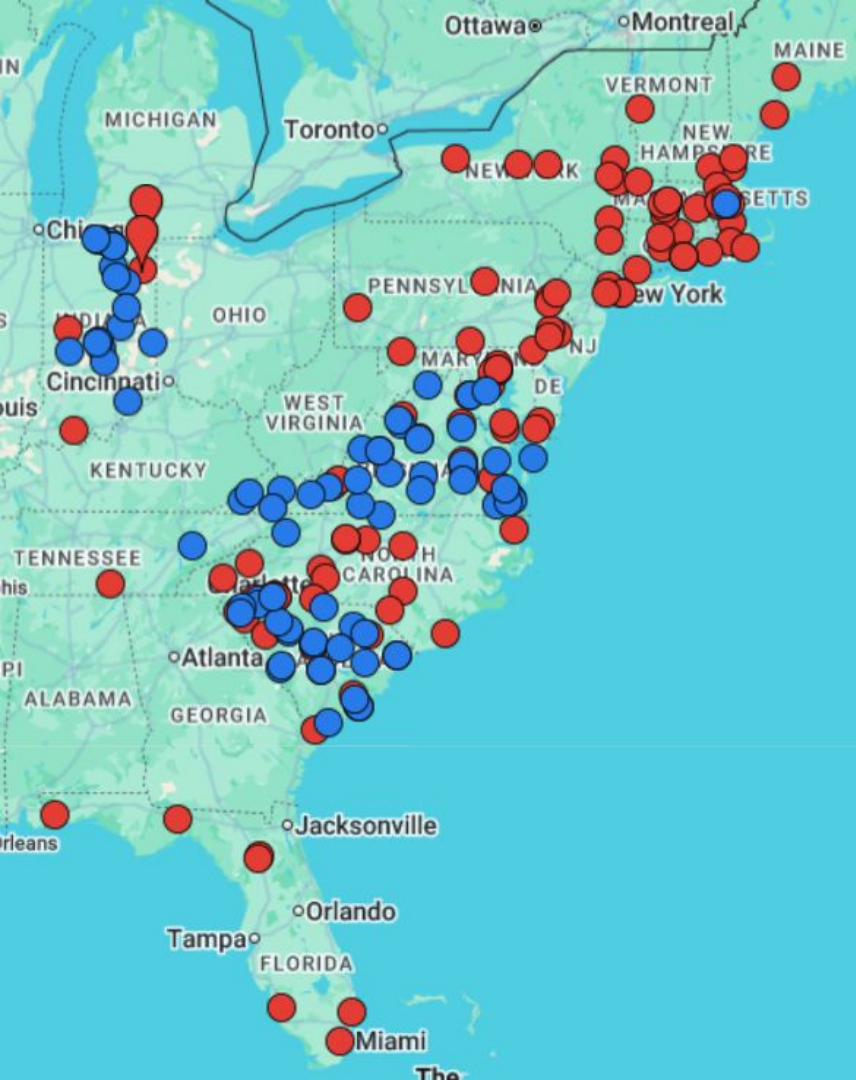
Retained/Retention Commitments: Titles libraries agree to keep and loan (or otherwise provide access to) in order to preserve the scholarly record.

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.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



190+ members in 17 States

120+ are monograph retention partners

31 serials and journals partners, more coming on this year

Over 11 million monographs currently retained and growing

Over 37,000 serials and journals currently retained

EAST Business Model

- EAST member libraries pay an annual membership fee based on collection size at the time of joining.
- Annual membership fees support EAST's operating budget.
- In addition to the annual operating budget, EAST maintains a reserve fund.

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



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

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.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

EAST Strategic Framework, 2026–2031

Pillar 1: STRENGTHEN member collection building & management strategies

Pillar 2: ADVOCATE on behalf of members

Pillar 3: ENHANCE the ongoing value of membership

Pillar 4: COLLABORATE to improve preservation & access

Key EAST Objectives

- Secure retention commitments beyond 2031 so that members can continue to rely on the EAST collective collection
- Advocate within member institutions and with outside partners
- Continuously improve access to the EAST collective collection (i.e., resource sharing among members)
- Transparent communication with members
- Develop partnerships to enhance member services

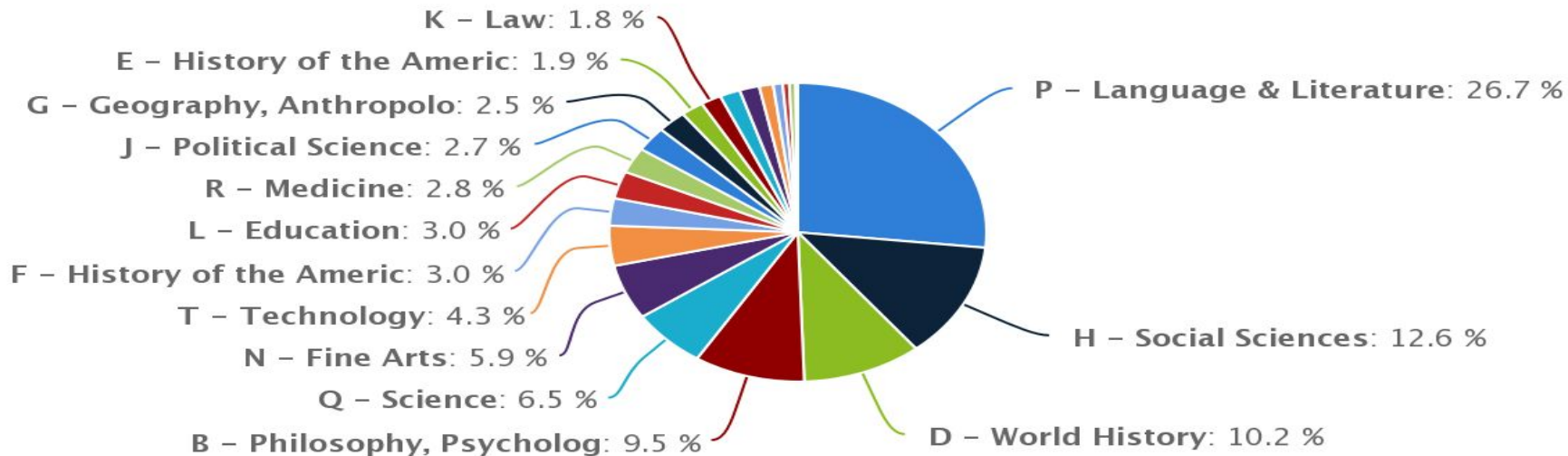


EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

EAST Collective Collection

LC call number facet



Monograph Collection Analysis

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).

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.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

The EAST Monograph Retention Model - Pre-2011 Titles

- Limited to print monograph titles published prior to 2011
- Retain all scarcely held – includes unique titles and those with limited holdings in WorldCat (if comparison with WorldCat is feasible)
- Retain additional copies of higher circulating titles (if circulation data available)
- Retain additional copies of titles published pre-1900
- Exclude out of scope material and material that meets EAST definition of “ephemera”
- As we work with newer libraries “top up” commitments to get to 5 commitments



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

The EAST Monograph Retention Model - Post-2011 Titles

67 EAST libraries participated in a collection analysis focussed on newer print monograph titles, those added to libraries' collections 2011-2021

- Retained unique titles
- Retained up to 5 copies of all other titles:
- Allocated commitments based on libraries' geographical region & existing commitment levels
- Excluded out of scope material and material that meets EAST definition of “ephemera”

Serials and Journals

- Thirty-one of the EAST members are Serials and Journals Retention Partners. One retains serials titles only.
- The journal collection analysis was carried out 2016-2019, with the support of the Center for Research Libraries, which worked with the EAST Program 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.
- In the early stages of a new round of S/J collection analysis

Details of this work can be found in the [EAST Serials & Journals Collection Analysis and Retention Modeling 2016-2019 document](#).



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



Center *for* Research Libraries
.....
GLOBAL RESOURCES NETWORK

PAPR

Print Archives
Preservation Registry

Search 154,260 records for:

Search

[Search Tips](#) [Advanced Search](#) [Browse Collection](#) [View Holdings](#)



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



SHARED PRINT PARTNERSHIP

*We envision a resilient,
interconnected partnership
dedicated to the enduring
stewardship and
accessibility of shared print
resources, enhancing
scholarly research and
collaboration at scale.*

**15 Member
Programs across the
U.S. and Canada**



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Partnership Resources & Projects

- Developed [Shared Print Toolkit](#) and Best Practices
- Guidance on managing communications around local deaccessioning work
- Risk model on [optimal number of copies to retain](#)
- [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 - [SPA](#)
- Shared print presence in resource sharing tools & Alma
- Open retention data repository
- Investigation of matching algorithm strategies



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



Center *for* Research Libraries

.....

GLOBAL RESOURCES NETWORK

Print Archive Network Forum (PAN)

The Center for Research Libraries fosters collaboration among library and consortia experts to share knowledge, expertise, and best practices in strategic print management. The **Print Archive Network (PAN) Forum** serves as a key venue for this exchange.

Held semi-annually since 2009, PAN meets on Friday mornings before ALA's annual and midwinter conferences. Anyone interested in print archiving is welcome to attend and participate.

PAN Event Lists and Materials

- The [CRL Event Index](#)^{CF} 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](#)^{CF} contains early discussions and materials leading up to the development of a North American print archives framework in 2010.
- Our [Digital Collections](#)^{CF} provides access to past PAN agendas and meeting notes.

[Visit PAN Upcoming Meetings Page](#) | [Contact PAN](#)

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/form/subscribe-to-the-pan-listserv>

Upcoming Virtual PAN Forum in January



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

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.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



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

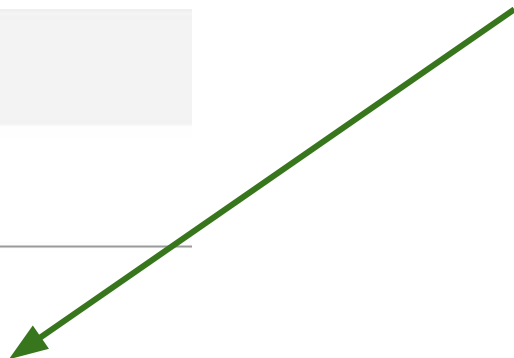
Stacks

Call Number

BX1390.M119

Note: committed to retain

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



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Shared Print in OCLC



OCLC SHARED PRINT SOLUTIONS

Functionality across services

WorldShare® Record Manager

Edit Shared Print commitment

LHR 343597293 (Shared Print) ×

Related Bibliographic Record 12345

Title Twentieth century interpretations of The fall of the house of Usher : a collection of critical essays

000	nx	un
001	343597293	
004	12345	
007	zu	
008	2012292u 0 4001aa 0201229	
014 1	991041723404131 \$b NCH	
583 1	committed to retain \$c 20160630 \$d 20310630 \$f EAST \$u https://eastlibraries.org/retained-materials \$2 pda \$5 NCH	
852	YHM \$b YHMM	

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



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Finding EAST Commitments

Monograph & Serial Commitments:

OCLC - Connexion, Record/Collection Manager, FirstSearch and some APIs.

Search box for members - just ask

Shared Print Retentions Search - Google Sheets Add on

Gold Rush - contact us if you want a login or visit <https://bit.ly/EASTGOLDRUSH>

GreenGlass & Choreo Insights - subscription based access

Serials Commitments Only:

Print Archives Preservation Registry (PAPR)

PAPR | Print Archives
Preservation Registry



EAST | EASTERN ACADEMIC
SCHOLARS' TRUST

Bonus Content

Gold Rush »

 samato@sharedprint.org



Decision Support

Set 1 Selection Form

Begin typing in the Provider/Database and a selection list will automatically be provided.

Provider/Database:

ebSCO

Set 2 Selection Form

Begin typing in the Provider/Database and a selection list will automatically be provided.

Provider/Database:

EBSCO INDUSTRIES --- ATLA Historical Monographs Collection Series 1

EBSCO INDUSTRIES --- ATLA Historical Monographs Collection Series 2

EBSCO INDUSTRIES --- ATLA Old Testament Abstracts

EBSCO INDUSTRIES --- ATLA Religion Database with AtlaSerials

EBSCO INDUSTRIES --- ATLA Religion Database with Atlas Serials PLUS

EBSCO INDUSTRIES --- ATLASerials PLUS Religion Collection

EBSCO INDUSTRIES --- Abstracts in Social Gerontology

EBSCO INDUSTRIES --- Academic Search Alumni Edition

☐ [Email \(export\) collection](#)

Shared Print Retentions Search Request OCLC API WSKey

Shared Print Retentio...

Search OCLC for registered Shared Print, and check HathiTrust and Internet Archives for digital surrogates



Test Sheets Add on api Search EAST Retentions-RegisteredIn... ☆ 📁 ☁ ⌚ 💬

File Edit View Insert Format Data Tools Extensions Help

🔍 ↶ ↷ 🖨 📄 100% | \$ % .0_ .00 123 | Calibri | ⋮ ^

	A	B	C	D	E	F	G	H	
1	OCLC	WorldCat OCLC	EAST Retentions	Retained By Symbol	Hathi	IA	US Holdings (Same edition) in WorldCat	Merged OCLC numbers	Hath
2	14025450		0				12		
3	32625860	32625860	1	VA@					
4	123456789012345		0						
5	51247428		0		Limited (search-only)				pst.C
6	16405913	16405913	9	NNM,YHM,	Limited (search-only)				uc1.
7	564795	564795	1	WCM	Full view				hvd.
8	12345	12345	1	YHM		twentiethcentury0000wood_l7u9			
9	asdf	Invalid OCN							
10	14025450		0						
11	32625860	32625860	1	VA@					
12	123456789012345		0						
13	51247428		0		Limited (search-only)				pst.C
14	16405913	16405913	9	NNM,YHM,	Limited (search-only)				uc1.
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Select tab that contains OCLCs in column A

TinyTest

Start search at row number: 2
(optional: min 2, max 1,000)

Select Services to Search:

☒ Shared Print Retentions in OCLC:
Program Name:

EAST

OCLC API Key and Secret

Metadata API ☐ Search API ☒

Key: AmzSXGC6la7mRQom

Secret: QWONTV9b7hIYIEzSL:

☐ Include Additional WorldCat Data -
Merged OCNs, Title
☐ Include Worldcat Holdings

☒ Availability in HathiTrust

☒ Availability in Internet Archives

Send email upon completion ☐

Start Search

☐ 6 min. ☒ 30 min. [i]

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](#)

NOTE: [PASCAL has its own process](#) to follow first!



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Resource Sharing through EAST

Resource Sharing Best Practices

Most libraries lend at no charge

- Rapid EAST pod - for Rapid ILL and Rapid Returnables
- EAST OCLC GAC
- Hybrid Rapid/Rapido POD in the works

Mailing List - ResourceSharing@lists.eastlibraries.org

Subscribe at: https://eastlibraries.org/member_resource/east-mailing-lists/

Resource Sharing Community of Interest

Next meeting July 15, 1 pm ET, registration under upcoming events on eastlibraries.org

<https://resourcesharing.eastlibraries.org/>



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST



Contacts: Download the Contacts List [WebPage](#) | [CSV](#) | [PDF](#)

Charleston Southern University	Eric Kistler	ekistler@csuniv.edu	
Christopher Newport University	Jesse Spencer	jesse.spencer@cnu.edu	
Claflin University	Morgan Montgomery	momontgomery@claflin.edu	
Claflin University	Maggie Mason Smith	maggie.smith@pascalsc.org	
Clemson University	Renna Redd	rennar@clemson.edu	
Clemson University	Interlibrary Loan	CU-RSTEAM@LISTS.CLEMSON.ED	
Coastal Carolina University	Michelle Lewis	mlewis@coastal.edu	
Coker University	Jim Willis	jwillis@coker.edu	
Coker University	Maggie Mason Smith	maggie.smith@pascalsc.org	
Colby College	Emma Bailey	emma.bailey@colby.edu	
College of Charleston	Brandon Lewter	lewterbj@cofc.edu	
Columbia College	Maggie Mason Smith	maggie.smith@pascalsc.org	
Connecticut College	Jana Pietrzyk	jpietrzyk@conncoll.edu	
Converse University	Dell Morgan	dell.morgan@converse.edu	
Coppin State University	Sharon Mollock	smollock@coppin.edu	
Danville Community College	Jennifer Walz	jennifer.walz@danville.edu	
Davidson College	Joe Gutekanst	jogutekanst@davidson.edu	
Eastern Shore Community College	Tabitha Driver	lrc@es.vccs.edu	
Elms College	Lily Webber	webberl@elms.edu	
Fairfield University	John Cayer	jcayer@fairfield.edu	
Five Colleges Incorporated	Jason Fuller	J.Fuller@fivecolleges.edu	

EAST Resource Sharing Contacts

EAST Resource Sharing Contacts and OCLC Symbols

Symbols: Download the Symbols List: [Webpage](#) | [CSV](#) | [PDF](#)

Last Updated July 2024		
Library	OCLC_Symbol	Docline_ID
Adelphi University	VJA	
Aiken Technical College	SKA	
Amherst College	AMH	
Anderson University	ZKF	
Appalachian State University	NJB	
Bard College	VVP	

ALMA Community of Interest

Meets quarterly, agenda set by members

Recent topics included

- displaying retentions in PRIMO
- handling 'bound-with' materials
- publishing profiles for automatic exports to Gold Rush

Next meeting June 4th, 10 a.m.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Communications with EAST members

- [EAST members email list](#)
- Operational, resource sharing, voting and billing contact(s)
- Quarterly member update webinars
- Onboarding sessions for new staff
- Annual member meeting in October



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

[About Us](#) ▾

[Collection Analysis](#) ▾

[Retention & Access](#) ▾

[Policies & Documentation](#)



Member Resources

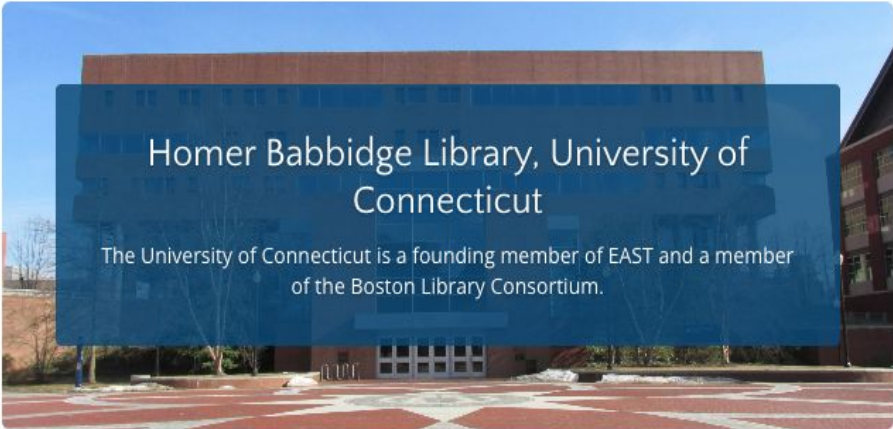
[Onboarding Documents, Best Practices...»](#)

FAQ

[Have a question? View our FAQ page! »](#)

Upcoming Events

[View recordings of previous events »](#)



Homer Babbidge Library, University of Connecticut

The University of Connecticut is a founding member of EAST and a member of the Boston Library Consortium.

Want to search the 11+ million EAST retention holdings?

Contact us at info@eastlibraries.org for a login to our Retentions Database!

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.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

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.



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST

Thank you.

tbaich@eastlibraries.org
samato@eastlibraries.org
matthew.revitt@maine.edu



Education, Owl
graphics by Freepik,
FlatIcon, CC BY 3.0 (via
Logo Maker)



EAST

EASTERN ACADEMIC
SCHOLARS' TRUST