EAST Update

March 16, 17 & 18, 2016
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Eastern Academic Scholars’ Trust
Our Agenda

• EAST staffing
• Overview of the EAST timetable
• Collection analysis update
• Validation Sample Study #1 update
• Policy work and MOU
• Other ongoing work
• Q&A
EAST staffing

Lizanne Payne, Shared Print Consultant

Matthew Revitt, Shared Print Consultant

Anna Perricci, Project Manager
Sara Amato, Data Librarian
EAST Major Milestones - 2016

- Data extracts for collection analysis - complete
- GreenGlass rolled out – throughout March
- Development of retention model(s) – mid March – mid May
- EC approves final model(s) – early June
- Retention proposals reviewed – June through late July
- Retention commitments finalized – by mid to late August

- Policy reviews by MWG – Feb. through May
- Major policies submitted to EC for approval – May
- MOU developed – May – Sept.
- MOU to EC and members for approval – Sept./Oct.
- VSS#1 – in process, complete 4/22/16
- VSS#2 planning – July – August
- VSS#2 conducted – Oct./Nov.
Collection Analysis

• First rollout of GreenGlass to Collection Analysis subgroup on March 7th.
• Full rollout of GreenGlass to participating members week of March 21 –
to receive logon credentials – go to http://goo.gl/forms/fZLSQ2gSqx
• Be SURE to review the SCS tutorials at: https://www.oclc.org/support/training/portfolios/library-
management/sustainable-collections/tutorials.en.html
• Collection Analysis subgroup will be developing retention models in
three “cycles” – each cycle representing one or more new retention
models. Following each cycle review, there will be an opportunity for
member feedback.
• Per the timetable, final recommendations on an approved model or
models to go to Executive Committee by early June
The EAST Shared Print Collection

**title sets**

4,749,042

**title holdings**

16,573,071

**title sets held by one library in the group**

50%

2,359,033 title sets

*title sets with > 10 aggregate uses*

20%

939,819 title sets

*title sets represented in hathitrust*

39%

1,865,115 title sets
PARTICIPANT HOLDINGS OVERLAP

1 or 2 holdings – 66%
3-9 holdings – 25%
10-19 holdings – 8%
20+ holdings – 2%
Eastern Academic Scholars’ Trust
All Included Libraries
Retained Percentage: 43%
Retained Titles: 7,139,051

Brandeis University
Retained Percentage: 43%
Retained Titles: 340,002

Criteria

LIBRARIES

Includes 36 of 36 Libraries

RETAIN 2

UConn
392,903 titles (43%) retained

Average: 43%
Validation Sample Study #1

• Training and outreach completed in February
• Libraries ran checks against ILS
• Data collection began in earnest week of Feb. 22
• Completion April 22\textsuperscript{nd}
• Anonymized data reviewed by MWG with recommendation to EC by early June
The EAST data collection tool
Status of Data Collection

Our data collection tool provides real-time data updates to the EAST team. As of Tuesday, March 15th, the libraries had completed some 42% of the total of sample and of those 101,448 items, 95.9% were accounted for:

<table>
<thead>
<tr>
<th># Checked</th>
<th>% Accounted For</th>
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<tbody>
<tr>
<td>101,448 (42.3%)</td>
<td>95.9%</td>
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Policy and MOU Work

• Focus on policy first, MOU language second
• Policies based on those coming out of the planning process
• Meetings Feb – May to review and recommend policies on:
  • Selection, retention, location ownership – Completed
  • Access and delivery – In process
  • Disclosure and Discovery – April
• MOU discussions commence May/June
• September – Final review of MOU terms and conditions as well as policies
• Review by EAST community with formal MOU and agreed policies in place by late fall, 2016
• EAST members execute MOU – upon EC approval, expected by December, 2016
Other Ongoing Work of the EAST Team

• Validation Sample Study #2 – planning to begin July with statistical consultant and implementation to commence in fall
  • REMINDER: Please DO NOT weed before this is completed
• Retention proposals made available to libraries in late June
  • Review and final commitments expected by end July – please plan accordingly
• In discussion with OCLC on batch updating of WorldCat with final retention commitments
• Future planning for EAST – coordination with other regional and national programs
• Future planning for 2nd cohort of EAST libraries in FY18

Eastern Academic Scholars’ Trust
EAST and Beyond

- April 8 – New England Technical Services Librarians -“Building a Shared Print Network in New England and Beyond” Presenters: Matthew Revitt, Special Collections and Maine Shared Collection Librarian & Anna Perricci, Project Manager, Easter Academic Scholars’ Trust (EAST)
- May 13 – ACRL New England Annual Conference – EAST update by Anna Perricci, Project Manager
- ALA Summer – Print Archive Network [PAN] update by Susan Stearns and Matthew Revitt
- “EAST by Northeast” article by Susan Stearns of the BLC in Collaborative Librarianship, submitted with expected publication spring/summer
- Against the Grain article planned for late summer/early fall
- Other outreach at local, regional and national conferences encouraged!
Responsibilities of Members Remainder of 2016

- **Validation and Collection Analysis**
  - Complete VSS#1 by **April 22**
  - Details of VSS#2 communicated – **Aug./Sept.**
  - VSS#2 conducted - **Oct. – Nov.**
  - Provide feedback on retention models
    - Cycle 1 – with rollout, **week of 3/21**
    - Cycle 2 – week of **4/11**
    - Cycle 3 – week of **4/25**

- **Retention**
  - Review initial retention proposals - June through late July
  - Retention commitments finalized – August
  - Final MOU feedback – **Sept./Oct.**
  - MOU executed by members – **Oct. – Dec.**

Reminder: Libraries should wait to commence any weeding and deselection until VSS#2 is completed in the fall whenever possible.
Thank you.

Q & A

URL for GreenGlass logon credentials:
http://goo.gl/forms/fZLSQ2gSqx

SCS tutorials:
https://www.oclc.org/support/training/portfolios/library-management/sustainable-collections.en.html

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