

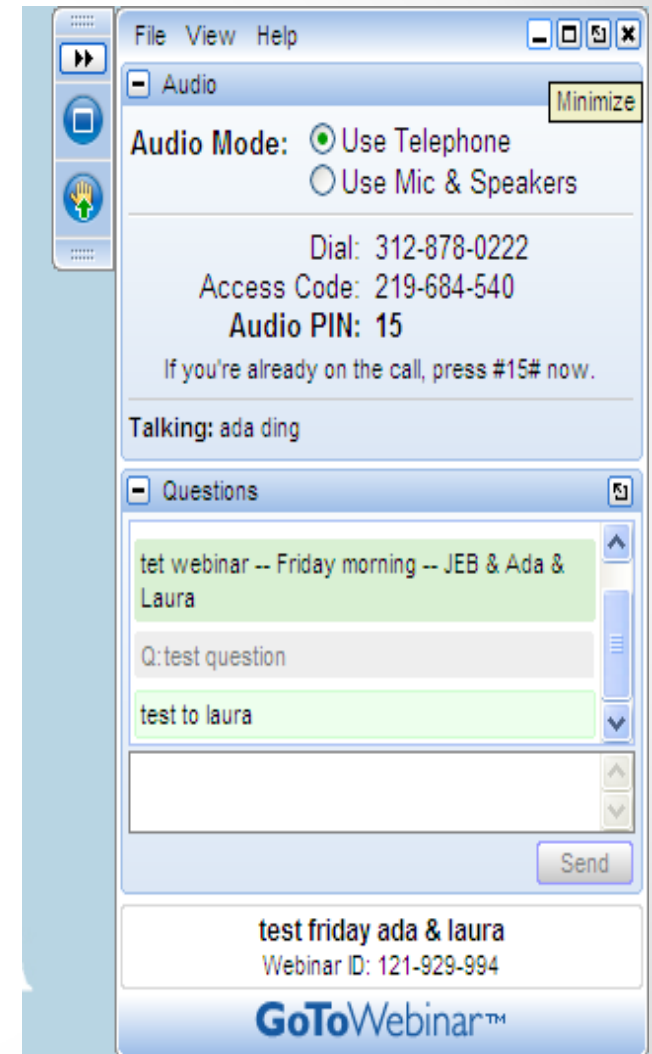


Town Hall e-Meeting

Monday, December 4, 2017

USING THE WEBINAR SYSTEM

- Audio for all participants is automatically muted.
You may speak freely with colleagues.
- You can ask a question in two ways:
 - Enter text in “Questions” or “Chat” boxes
 - **Raise your hand**; moderator will temporarily un-mute your audio connection.



AGENDA

- Welcome / Quick Overview
- Scholars Trust Update
- Collection Analysis Pilot – CRL
- Rosemont Update
 - SCS Overview
 - Access Principles
- Announcements/Questions

Scholars Trust Governing Council

ASERL

MacEwan, Gilstrap, *Burger*

WRLC

G-Henry, *Jacobs*

FLARE

Russell, *Walker*

Scholars Trust Steering Cmte

Lars Meyer, Chair

ASERL

Jay Forrest (GT)
Millie Jackson (U-Ala)
Cole-Bennett

WRLC

Ryan Johnson (Georgetown)
Dolsy Smith (GWU)
Hulse

FLARE

Lisa Fish (U-Miami)
Walker



What Consortia Are Participating?

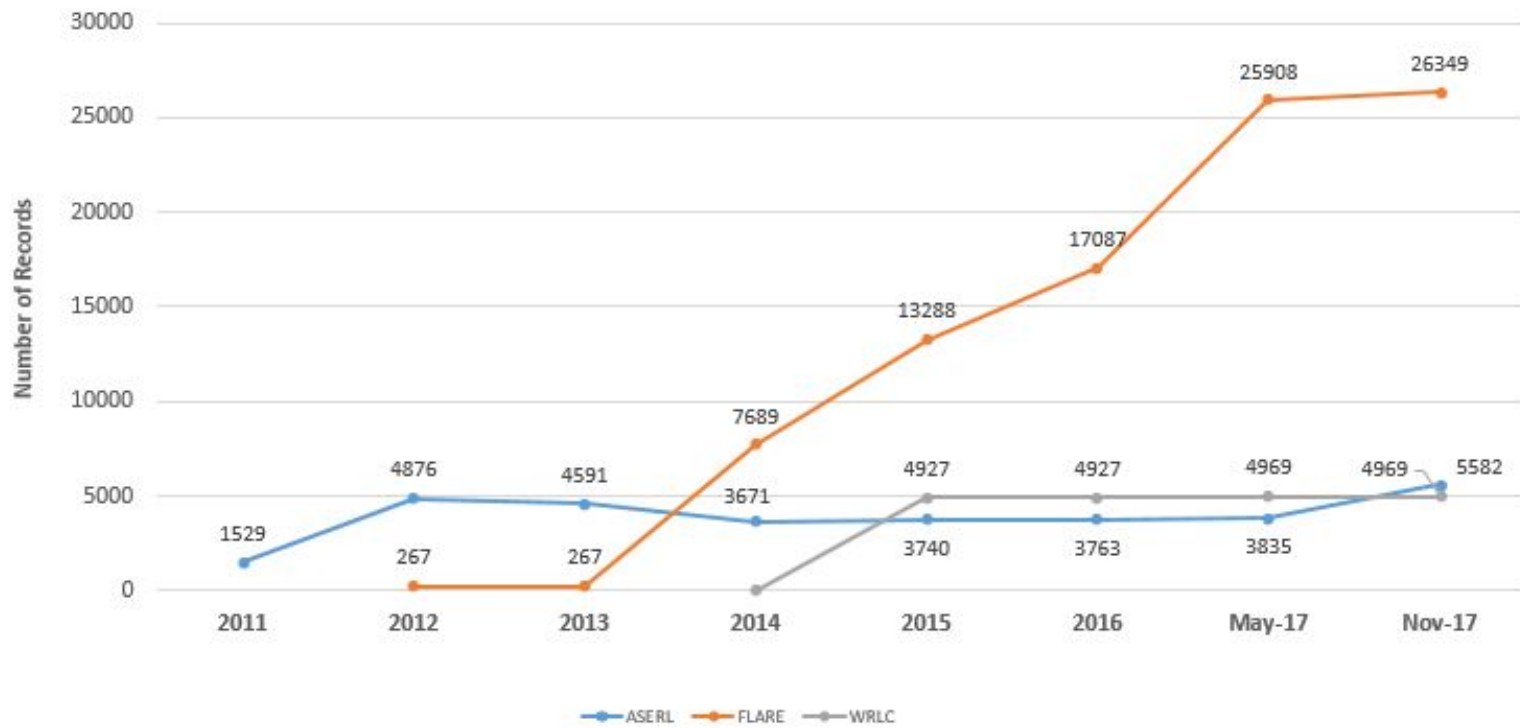


FLorida
Academic
REpository



Scholars Trust Update

Retention by Program



Program Growth since May 2017

Two new Libraries –

Florida State University

University of North Carolina - Charlotte

1747 additional titles

University of North Carolina – Chapel Hill, 1257

Duke University, 201

Tulane University, 134

University of Louisville, 79

University of South Carolina, 57

Johns Hopkins University, 53

East Carolina University, 43

Wake Forest, 2

Barriers to Participation?

Environmental Scan -- Selection Criteria

Top 5 Criteria for Selecting Titles for Retention

1. Value to institution
2. Class/Subject matter
3. Completeness of run
4. Rare/unique
5. Physical condition

Criteria with Little to No Impact on Selection

1. Dual commitments
2. Number of copies
3. Circulation counts
4. Age of material
5. Shelf location

Environmental Scan – Future Program Growth

65% of Scholars Trust
libraries expect the relocate
journals to storage within
next 5 years

Environmental Scan – Use of 583 Action Notes

- 10 have completed the 583 retention commitments in their local catalog
- 8 completed the 583 retention commitments in OCLC Worldcat
- 3 are in process
- 2 have yet to determine titles for retention
- 6 did not respond

Environmental Scan – Access Expectations

Standard ILL is acceptable

- 24-48 hours for electronic delivery
- One week or less for print delivery
- Negotiated access for large runs

CRL
Collection Analysis
Services

What can it tell us?

- Total record count by library
- Number of holding libraries by title and depth of holdings
- Identification / Review of non-standard records:
 - No OCLC in Record
 - OCLC# or ISSN# not found in WorldCat
 - Failed serial check
 - Failed print copy check
 - Failed ISSN check
 - Superseded OCLC

What can it tell us?

- Indicate if the title is already listed in PAPR, and to which programs associated holdings belong
- Note the existence of electronic versions, and provide the OCLC# for the electronic version
- Indicate if the title is a JSTOR resource, and indicate the source of electronic version if it is not a JSTOR title

Benefits of CRL Analysis

Shared Collection Growth

- Big Picture View of Local Journal Holdings
- Highlight Subject Strengths
- Support Planned Redundancy
- Actively Identify Unique/Scarce Copies for Preservation

Intentional Decision-making
Centrally Coordinated Analysis

CRL Analysis Pilot Project

- Seek 6 CRL Member Libraries from Scholars Trust
(pilot is no-cost analysis for CRL members)
- Participating libraries agree to submit a file of their serial holdings by **January 31, 2018**
- CRL reports returned approximately March 2018

Deadline to volunteer: **December 15, 2017**

Participating libraries will be notified by December 22, 2017





- Collaboration between print archiving programs
 - Scholars Trust, WRLC, FLARE, Western Regional Storage Trust (WEST), and Big 10 Academic Alliance (formerly CIC)
- Began meeting in October 2015
- Goal of increasing collaboration between these programs while increasing retention of print serials across the country
- Retain 100K more titles by 2021, ideally 3 copies of each
- Common guidelines for metadata, gap-filling, last copy retention

Sustainable Collection Services - SCS

Journal DSS Concept



ETL Process

CRL cleans and validates library data; SCS links data with multiple external sources & loads to DSS

Depth Estimation

Estimate the completeness of every run and determine a relative rank among group members holding the same title

Title Classification

Based on group-defined rules, cluster titles into logical categories that drive local priorities

Retention Modeling

Based on group-defined rules, depth, and class, allocate retention requests among all members

Registration

Register accepted retention requests in CRL's PAPER and WorldCat; Sync with other OCLC services

Deselection (Optional)

Facilitate deselection decisions based on retained titles and customer-defined criteria

Needs & Offers

Facilitate gap filling by auto-connecting registered holdings at one library to unregistered holdings at other libraries

Flexible Classification of Titles

Criteria

LIBRARIES

Includes 36 of 36 Libraries

RETAIN ALL

Choose...

- Choose...
- Group overlap**
 - EAST holdings
- WorldCat holdings**
 - US holdings
 - Maine Shared Collections holdings
 - Regional Large Academic Libraries holdings
 - Regional College Libraries holdings
 - Boston Library Consortium (BLC) holdings
 - CNY Retention Partners holdings
- Group title-set attributes**
 - Aggregate uses
 - Last charge year
 - Publication year**
 - Last item add year
 - HathiTrust
 - Ephemera

(ANY EDITION)

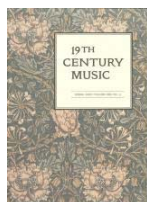
CNY Retention Partners holdings

FEWER THAN 1

(ANY EDITION)

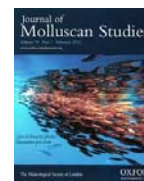
Titles can be segmented / grouped by whatever criteria is appropriate. Examples with *made-up data*:

High-Risk Titles



Print Titles Registered = 0
 E-Archives = 0
 E-Backfile Availability = 0
 US Holdings, **Less than 25**

Secured Titles



Print Titles Registered = 3
 E-Archives = 1
 E-Backfile Availability = 1
 US Holdings, **More than 100**

Ceased Journals in German



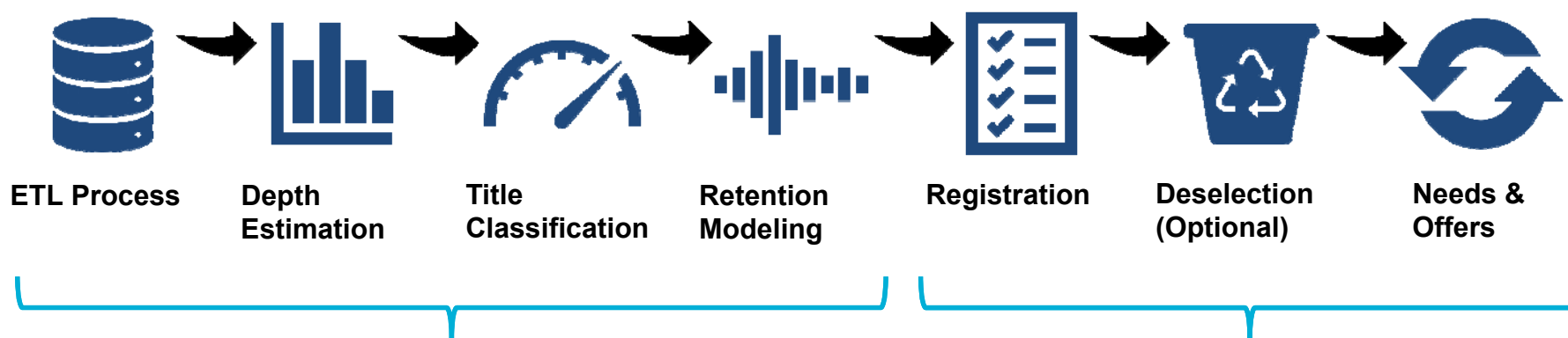
Registered by Group = 0
 Global Holdings, **Less than 25**
 Language = **German (gw)**
 Pub Status = **Ceased (d)**

QD Published in India / Few US



LC class = **QD**
 US Holdings, **Less than 25**
 Place of Pub = **India (ii)**

Development Phasing



Phase 1: Data Capture & Retention Modeling

- Development Estimate: +12 Months

Phase 2: Management Tools

- Development Estimate: +12 Months

Rosemont webinar on
SCS Journal Collection
Analysis Proposal
Services

January 2018

EAST

Cohort 1 Serial & Journal Retention Partners

1. Amherst College
2. Bard College
3. Boston College
4. Boston University
5. Brandeis University
6. Connecticut College
7. Elms College
8. Fairfield University
9. Five Colleges, Incorporated
10. Hamilton College
11. Lafayette College
13. Loyola Notre Dame
14. MBLWHOI
15. Mount Holyoke College
16. Siena College
17. Smith College
18. Swarthmore College
19. Trinity College
20. Union College
21. University of Massachusetts Amherst
22. Williams College

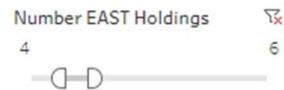
All Library Holdings



Amherst	6,747
Bard	1,271
Boston College	29,787
Boston University	28,367
Brandeis	14,636
Connecticut College	9,769
Elms	160
Fairfield	1,340
Five Colleges	19,101
Hamilton	5,998
Lafayette	6,302
Loyola	2,580
Mount Holyoke	6,898
Siena	2,243
Smith	7,346
Swarthmore	3,148
Trinity	5,220
Tufts	7,519
UMass Amherst	34,052
Union	4,658
Williams	10,716
Woods Hole	6,691

**Total:
112,582**

4-6 Library Holdings



Amherst	1,201
Bard	180
Boston College	4,912
Boston University	4,597
Brandeis	2,854
Connecticut College	1,600
Elms	46
Fairfield	361
Five Colleges	3,004
Hamilton	1,312
Lafayette	1,585
Loyola	663
Mount Holyoke	1,463
Siena	454
Smith	1,268
Swarthmore	826
Trinity	1,268
Tufts	1,973
UMass Amherst	4,150
Union	1,251
Williams	2,395
Woods Hole	794

Total: 8,099

Library Holdings for Unique Titles



Amherst	2,805
Bard	64
Boston College	11,499
Boston University	12,140
Brandeis	4,755
Connecticut College	3,474
Elms	14
Fairfield	82
Five Colleges	8,012
Hamilton	1,053
Lafayette	930
Loyola	156
Mount Holyoke	1,592
Siena	174
Smith	2,711
Swarthmore	171
Trinity	675
Tufts	937
UMass Amherst	18,158
Union	460
Williams	2,466
Woods Hole	3,385

Total: 75,713

Rosemont Access Principles

The Rosemont Shared Print Alliance shares a common mission to collaboratively develop, manage and coordinate the identification, retention, registration, discovery of and access to a shared, distributed collection of print journals in the United States. In fulfillment of this mission, participant libraries agree to the following access principles:

1. Participants agree to make archived materials available to other Rosemont members. Material archived for the Rosemont Alliance is eligible for lending to institutions outside of the Alliance per the holding library's lending relationships and policies.
2. Rosemont archived holdings will be distinctly identified in OCLC from other holdings and copies to facilitate resource sharing and statistics gathering.
3. Lending and borrowing activity will be subject to established local practices, systems, workflows, and policies.

4. Delivery methods are recommended in the following order of preference:
 - a. Provide electronic document delivery
 - b. Provide photocopies
 - c. Loan the physical issue or volume to the borrowing institution for building use only
5. Upon request, participants are encouraged to provide physical delivery of full backfiles on a case-by-case basis.
6. The safety of the borrowed material is the responsibility of the requesting institution from the time the material is shipped until it is received back by the lender.
7. Participants are encouraged to re-validate materials upon return in keeping with local practices.
8. Participants will collect and share agreed upon statistics on access, delivery, loss and damage annually.

Document available on the ASERL website:

<http://bit.ly/2AtQyNg>

Announcements Questions