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:
  o Enter text in “Questions” or “Chat” boxes
  o Raise your hand; moderator will temporarily un-mute your audio connection.
AGENDA

• Welcome/opening comments
• Program Updates
  o FLARE
  o Scholars Trust
  o Rosemont Shared Print Alliance
• Scholars Trust Participant Survey
• CRL Collection Analysis Pilot
• Announcements/Questions
Program Updates

FLorida Academic REpository
FLARE

• Statewide shared collection of low use print materials for academic libraries in Florida

• Administratively hosted and operated by the George A. Smathers Libraries at the University of Florida

• Partners include libraries of the State University System of Florida Universities and the University of Miami

• Two storage facilities: environmentally controlled, carefully inventoried, and secure
  - Currently expanding capacity with additional HDF style shelving
FLARE

- Total Volumes: 1.493 million
- Serial Volumes: 586,463
- Serial Titles: 33,561
- Gov Docs Volumes: 355,071; Hearings est. completion in Jan. 2019
- Last Copies: 2,982 items (monographs and serials)
  - FLARE’s Last Copy policy acknowledges the value of retaining at least one copy of each unique title in the state as part of a preservation program and supports the preservation of unique titles held in Florida.
  - Under this policy, all academic libraries in Florida are granted the right to deposit last copies of monographs, government documents, and serials being withdrawn from their collections into FLARE for preservation.
- Shelving project to increase capacity – phase two of two underway.
Journal Retention and Needs Listing (JRNL)

• FLARE records not up to date
  o Problems getting accurate data for upload—reporting issue getting data from LMS
  o Data clean-up project underway with JRNL upload by year end (incorrect bib records, title families, etc.)

• No new activities
  o As part of the Rosemont Shared Print Alliance goals, investigated Decision Support Tool options
  o Revisiting how to make use of existing options such as JRNL, AGUA, etc.
Scholars Trust Governing Council

ASERL
Gilstrap, McNally, Burger

WRLC
G-Henry, Jacobs

FLARE
Russell, Walker

Scholars Trust Steering Cmte

Lars Meyer (Emory), Chair

ASERL
Jay Forrest (GaTech)
Millie Jackson (U-Ala)
Cole-Bennett

WRLC
Ryan Johnson (Georgetown)
Dolsy Smith (GWU)
Hulse

FLARE
Lisa Fish (U-Miami)
Walker
50 Libraries

37,935 JRNL Records | 29,400+ titles
## Top Contributing ASERL (non-FLARE) Libraries

<table>
<thead>
<tr>
<th>Library</th>
<th>Number of Records</th>
<th>Growth since 5/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of North Carolina – Chapel Hill</td>
<td>1,771</td>
<td></td>
</tr>
<tr>
<td>Duke University</td>
<td>933</td>
<td>+ 1</td>
</tr>
<tr>
<td>National Agricultural Library</td>
<td>488</td>
<td>+ 488</td>
</tr>
<tr>
<td>Georgia Tech</td>
<td>469</td>
<td></td>
</tr>
<tr>
<td>College of William &amp; Mary</td>
<td>457</td>
<td></td>
</tr>
<tr>
<td>University of South Carolina</td>
<td>336</td>
<td>+ 121</td>
</tr>
<tr>
<td>Virginia Tech</td>
<td>325</td>
<td></td>
</tr>
<tr>
<td>Wake Forest University</td>
<td>179</td>
<td></td>
</tr>
<tr>
<td>Virginia Commonwealth University</td>
<td>154</td>
<td></td>
</tr>
<tr>
<td>University of Louisville</td>
<td>148</td>
<td></td>
</tr>
<tr>
<td>University of Memphis</td>
<td>143</td>
<td></td>
</tr>
<tr>
<td>University of Kentucky</td>
<td>131</td>
<td></td>
</tr>
<tr>
<td>Emory University</td>
<td>124</td>
<td>+ 74</td>
</tr>
<tr>
<td>University of Alabama</td>
<td>122</td>
<td></td>
</tr>
<tr>
<td>Tulane University</td>
<td>120</td>
<td>+ 1</td>
</tr>
</tbody>
</table>
About 160 U.S. Institutions
The Chairperson role rotates annually in January.
Reciprocal Retention

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 Alliance Access Principles.

Strategic Directions, 2017-2021

• **Collection Growth**
  o To establish milestones for collection growth and retention including adding titles and copies to the shared collection for high overlap titles, and establishing policies and procedures for preserving copies of journal titles that are scarcely held.

• **Shared Policies or Guidelines**
  o To align operational policies for registration of retention commitments, preservation actions, discovery of, and access to shared print journal collections.

• **Engagement with other programs and providers**
  o To engage with other shared print programs to share information, expertise and to coordinate strategies.
  o To develop a participation model to engage other groups in this cross-regional program.

https://rosemontsharedprintalliance.org/strategic-directions
Rosemont Engagement with the Mellon Grant (2018-2020)
To Enhance the infrastructure of OCLC WorldCat &
CRL’s Print Archives Preservation Registry (PAPR)

• Enable batch registration of shared print serial retention commitments in Worldcat.
  o Eliminates the need for a second “shared print” OCLC symbol.

• Improve search functions and discovery of shared print holdings.
  o Create an API to retrieve serial holdings data from WorldCat.

• Enable synchronization of WorldCat and PAPR holdings for registered titles.

http://www.crl.edu/infrastructure-shared-print-collections
Desired Outcomes

• To identify participating libraries’ goals for shared print retention, and their expectations for participation in Scholars Trust.

• To seek feedback on decision support tools such as the Journal Retention & Needs Listing [JRNLI] and the functionality needed to support retention efforts.
Survey Responses

17 ASERL
54% of 31 participating libraries

4 WRLC
50% of 8 participating libraries
My Library’s Intent to Commit Titles for Scholars Trust is…

11 Sporadic – as time/resources permits
5 Unknown – not made a decision
3 Complete - no additional titles
2 Strategic – an established goal
Retention Expectations

5  Undeclared/unknown
3  20 titles per year
2  Total of 100/130 titles
1  2 titles/year
1  25/month
Titles selected for retention are best described as...

12 Mix of rare/unique/widely-held
3 Widely-held
3 Other [University Press or based on space considerations]
2 Rare/unique
1 Unknown
<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Not currently, will address space allocation in 3-5 years</td>
</tr>
<tr>
<td>7</td>
<td>Yes, have withdrawn duplicate Scholars Trust titles</td>
</tr>
<tr>
<td>3</td>
<td>Yes, have plans to withdraw titles within next 2 years</td>
</tr>
<tr>
<td>1</td>
<td>No, space allocation is not a priority</td>
</tr>
</tbody>
</table>
Additional Subject Collections

- STEM
- Accounting
- Economics
- Music, Latin America/Caribbean, African Studies, Education, Nursing, Geography, Law
- Greek language and other languages with diacritics | visual arts based journals | poetry journals and literary magazines
JRNL Functionality

(Priority as Decision Support Tool, DSS)

1. Registration of Titles in JRNL
2. Search Options (OCLC#, ISSN, PSAP, etc.)
3. Communication - Offers to Fill Gaps
4. Publicly-accessible Title List on Website
5. Facilities Profiles (location/environmental conditions)
6. LC Subject Classifications
7. Disclosure via PAPR
8. Express Gaps in Holdings
Additional DSS Functionality

• Data visualization, holdings by geographic region/state, completeness, number of commitments and volume levels.

• Reporting –
  o Usage reports.
  o Batch processing of queries to generate reports for multiple title at once.
  o Standard report format for each title.

• A union title list of our needs so that we could plug in needs if we have them.
CRL Collection Analysis Pilot
• 6 ASERL/CRL Member Libraries:
  o Emory University
  o University of Alabama
  o University of Florida
  o University of South Carolina
  o University of Tennessee-Knoxville
  o Virginia Tech

• January 2018 – **over 761,000 records** submitted.

• Mid-June 2018 - 1\textsuperscript{st} Analysis Reports received.

  Just under **202,000 records** were included in the analysis.
  [Non print holdings: Electronic, microfilm/fiche, etc.]
Benefits of Shared Analysis

More Information for Intentional Decision-making

- Identify overlap in titles for informed deselection and planned redundancy
- Identify scarce titles to actively preserve and make informed local deselection decisions
- Provide a high-level picture of local journal holdings → highlighting areas of subject strength
Checks Report

An analysis of each libraries’ submitted records, with a data integrity check against OCLC Worldcat.

Records were identified for inclusion/exclusion from further analysis with an indicator for that decision.
Comparison Report

Compares holdings across the pilot libraries, with the number of holding libraries for each title - from one holding library to all six.

This report also identified titles with retention commitments represented in the PAPR Registry, allowing further comparisons against Scholars Trust and Rosemont Shared Print Alliance titles.
Worldcat Comparison Report

Compares titles against all holdings in Worldcat.

This report provides the opportunity to identify rare/unique titles held by pilot libraries as well as the ability to filter retention commitments based on titles that are widely held.

* Of note: This report uses an OCLC API. Problems with the API results can occur unpredictably and have been reported to OCLC. Due diligence is required in using this assessment.
### Overlap

<table>
<thead>
<tr>
<th>Holding Library</th>
<th>Number of Records</th>
<th>Percent of total:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Holding Library</td>
<td>136,809</td>
<td>67%</td>
</tr>
<tr>
<td>2 Holding Library</td>
<td>29,822</td>
<td>15%</td>
</tr>
<tr>
<td>3 Holding Library</td>
<td>17,157</td>
<td>9%</td>
</tr>
<tr>
<td>4 Holding Library</td>
<td>10,718</td>
<td>5%</td>
</tr>
<tr>
<td>5 Holding Library</td>
<td>6,077</td>
<td>3%</td>
</tr>
<tr>
<td>6 Holding Library</td>
<td>1,361</td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

1,361 titles are held by all six pilot libraries. Of these, 828 already have retention commitments in Scholars Trust (60%).
The 1,361 titles held by all 6 libraries were further analyzed to identify the top 3 libraries with the highest number of holdings (years, volumes, issues) of the titles. These libraries were “nominated” as the best 3 candidates to retain the title for Scholars Trust.

<table>
<thead>
<tr>
<th>Library</th>
<th>Submitted Records</th>
<th>Records in Comparison</th>
<th>Number of Titles Nominated for Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>262,813</td>
<td>43,707</td>
<td>767</td>
</tr>
<tr>
<td>Emory</td>
<td>30,006</td>
<td>29,005</td>
<td>603</td>
</tr>
<tr>
<td>Florida</td>
<td>324,951</td>
<td>127,549</td>
<td>1,132</td>
</tr>
<tr>
<td>South Carolina</td>
<td>56,942</td>
<td>53,693</td>
<td>965</td>
</tr>
<tr>
<td>Tennessee</td>
<td>49,490</td>
<td>41,466</td>
<td>677</td>
</tr>
<tr>
<td>Virginia Tech</td>
<td>37,448</td>
<td>33,927</td>
<td>686</td>
</tr>
<tr>
<td>Total:</td>
<td>761,650</td>
<td>201,944</td>
<td></td>
</tr>
</tbody>
</table>

These are NOMINATIONS ONLY at this time, not retention commitments for these titles.
Data Visualizations

- Overlap in Holding Libraries
- Scarce/Widely Held
- Scholars Trust | Rosemont title (PAPR)
- LC Class/Subject
- Publication Date
- JSTOR/Electronic
- Others?
PowerBI

CRL Collections Analysis Pilot

Select institutions to compare from the dropdown list. The list and counts of shared titles will be recalculated to focus on holdings in common between the selected institutions.
Tableau
EAST Journal Working Group

### Widely Held Titles

- Held by 7-28 libraries (both cohorts)
- Not Retained by Cohort 1
- Not in Rosemont

#### 706 EAST Title Sets

7,415 EAST Title Holdings

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN</th>
<th>No. of EAST Ls</th>
<th>Holding Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ironwood</td>
<td>1017846</td>
<td>0047-150X</td>
<td>11</td>
</tr>
<tr>
<td>Bibliographic survey, the negro in print</td>
<td>1028290</td>
<td>0546-1465</td>
<td>10</td>
</tr>
<tr>
<td>Africa</td>
<td>1049566</td>
<td>0644-6476</td>
<td>11</td>
</tr>
</tbody>
</table>
| College student personal abstracts | 1072413 | 0010-1168 | 7 | Boston College, NYU, Rochester, Siena, Syra., ...
| Oceanography and marine biology | 1099384 | 0078-3218 | 12 | Boston College, Five Colleges, Lafayette, Ro., ...
| New Japan | 1141924 | 0545-1906 | 7 | Boston College, Five Colleges, Rochester, S. |
| AARP: Art and archaeology research papers | 1154213 | 0002-3167 | 9 | Boston College, Mount Holyoke, Smith, UMass, ...
| World financial markets | 1154212 | 1060-2083 | 7 | Five Colleges, Rochester, Swarthmore, Syracuse, ...
| M.H. | 1190463 | 0025-9693 | 11 | Boston College, Boston University, Brandeis, C. |
| First: review of the great English vortex | 1299608 | 0026-8185 | 12 | Amherst, Boston College, Rochester, Tufts, U. M., ...
| Studio music | 1200130 | 0091-7810 | 12 | Amherst, Boston College, Rochester, Tufts, U. M., ...
| Internal revenue acts | 1203042 | 0885-0437 | 9 | Amherst, Boston College, Brandeis, Five Colleges, ...
| Annual report | 1232805 | 0080-3931 | 14 | Boston College, Brandeis, Five Colleges, Boston, |
| The President’s review and annual report | 1232837 | 0557-8851 | 11 | Boston College, Brandeis, C. |
| The Statesman’s year-book | 1232826 | 0081-4601 | 19 | Amherst, Boston College, Brandeis, C. |
| America votes | 1240412 | 0065-676X | 13 | Amherst, Brandeis, Five Colleges, Swarthmore, Bac.
| Planning: selected papers from the ASPO National Plan | 1249629 | 0886-0584 | 7 | Boston College, Rochester, Swarthmore, Trinity, U.
| Annual report | 1268633 | 0069-0535 | 13 | Boston College, Boston University, Brandeis, C. |
| Holanda-Jahrbuch | 1283738 | 0340-0849 | 12 | Amherst, Boston College, Hamilton, Lafayette, ...
| Acts of mammalian chromosomes | 1302190 | 0373-9581 | 9 | Amherst, Bard, Boston College, Brandeis, C. |
| Afterimage | 1338257 | 0300-7472 | 12 | Amherst, Bard, Boston College, Brandeis, C. |
| The Writer’s market | 1361133 | 0084-2729 | 13 | Amherst, Boston College, Brandeis, C. |
| Bibliography on income and wealth | 1378497 | 0534-6829 | 10 | Boston College, Brandeis, C. |
| Congress and the nation | 1421109 | 1047-1324 | 8 | Amherst, Boston College, Brandeis, C. |
| Bibliographie internationale de l’Humanisme et de la Renaissance | 1423348 | 0067-7100 | 12 | Amherst, Boston College, Brandeis, C. |
| Geo abstracts. D. Social geography and cartography | 1434264 | 0267-9909 | 12 | Boston College, Brandeis, C. |
| World | 1440885 | 0049-9009 | 17 | Boston College, Brandeis, C. |
| Victorian Institute journal | 14558163 | 0886-3865 | 7 | Boston College, Brandeis, C. |
| Abstracts of folklore studies | 1460586 | 0001-3887 | 10 | Boston College, Brandeis, C. |
Next Steps for the Pilot Libraries

• Allocation Report Review, January 2019

• Assess Usefulness & Scalability of Project.

• Recommendation to the Scholars Trust Governance Committees.
Announcements?
Questions?

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