Scholars Trust
Activity Report – March 2021

Governing Council ASERL Representatives: Doug Way (U-Kentucky) and Tom McNally (U-South Carolina). Steering Committee Chair: Lars Meyer (Emory University) Full member list available at: https://bit.ly/2P71coM

Overview
Scholars Trust is a partnership among the Association of Southeastern Research Libraries (ASERL), the Florida Academic Repository (FLARE), and Washington Research Library Consortium (WRLC) to share the effort of the long-term retention of and access to print materials held by academic libraries in support of learning and scholarship. The retention agreement is in effect through December 31, 2035.

Activities
In total, 52 academic libraries (including 35 of ASERL’s 37 members) participate in Scholars Trust, holding 57,811 retained titles as of March 2021. This represents an increase of 474 titles since the January 2021 reporting.

33 ASERL Scholars Trust libraries continue to engage in a print journal collection analysis with the Center for Research Libraries (CRL), with the goal to retain a minimum of 4,500 additional print journal titles. As part of this initiative, the Steering Committee developed a Retention Model (see https://bit.ly/2xHlk4H) establishing criteria that will guide the future selection/nomination of retained titles and the program’s broader participation in the Rosemont Shared Print Alliance. The analysis has contributed to the unprecedented growth in the program; 17 of the 33 libraries have accepted over 4,800 nominated titles for retention.

The Scholars Trust retention agreement specifies program reviews in 2020 and 2030 to consider whether technology and other changes in the higher education ecosystem continue to warrant this investment of resources and to ensure the arrangement continues to provide value to the participating organizations. To this end, a brief survey was conducted in early August 2020 in which libraries unanimously affirmed that Scholars Trust continues to benefit their library and university. A Town Hall e-Meeting was also held on September 16, 2020 to review the survey results and to solicit additional feedback. The session had 53 attendees and the session recording is available at http://www.aserl.org/archive/.
Scholars Trust libraries [ASERL, FLARE + WRLC] manage their journal retention commitments in the Journal Retention and Needs Listing [JRNL] software designed and hosted by the University of Florida. JRNL allows libraries to expose lists of print journals for which they have made retention commitments; and to express needs (or gaps) in their holdings. The software facilitates communication between library staff among participating institutions to identify holding commitments, gap filling opportunities as well as supporting deselection decisions. An enhancement to the gap-fill functionality to allow batch updating of gap records was implemented in December 2020.

In addition to Scholars Trust, BTAA and WEST also record their retention commitments in JRNL. As of March 2021, these shared print programs have recorded 76,842 retention commitments in the tool:

- ASERL: 16,754 titles
- BTAA: 8,188 titles
- FLARE: 31,758 titles
- WEST: 10,843 titles
- WRLC: 9,299 titles

In the News! The Eastern Academic Scholars Trust (EAST) libraries recently voted to join JRNL and expect to use the software primarily for gap-filling activities.

A publicly accessible list of the titles retained for Scholars Trust is maintained on the program website so others can easily access the information. www.scholarstrust.org. A quarterly report of Scholars Trust title records is also shared with the PAPR Registry, a national clearing house of journal retention data hosted by the Center for Research Libraries (CRL). As part of their validation processes, CRL periodically generates data integrity reports which help identify non-standard data in submitted records. These reports are distributed to contributing libraries for their review and updating as needed.

Rosemont Shared Print Alliance
Scholars Trust is also a founding member of the Rosemont Shared Print Alliance. Together, Rosemont Alliance shared print programs have ratified common access principles and best practices for metadata and approved guidelines for last copy retention and donation/transfer. When the Rosemont Alliance was formed in 2015, the participating libraries held retention commitments for approximately 45,000 journal titles and set a shared goal of adding 100,000 new titles by 2021. As of January 2021, the Alliance has exceeded that goal, with retention commitments for over 178,350 titles. Retained title counts are updated twice yearly, in conjunction with the Print Archive Network (PAN) meetings.

The Rosemont Alliance will soon reach its five-year anniversary, and John Burger is leading the effort to draft new 3-year strategic directions.

The Alliance is also engaged in a “Last Known Copy” project to protect journal titles with few/no retention commitments. Pilot participants from ASERL are Emory, Johns Hopkins, UGA, and UNC Charlotte.
PAPR recently developed a combined title listing for five shared print programs in the Rosemont Alliance, available at: http://papr.crl.edu/program/81/rosemont-shared-print-alliance.

WRLC’s Scholars Trust Governing Council representative, Stephen Connaghan (Catholic University of America) serves as Chair of the Rosemont Shared Print Alliance Executive Committee for 2021.
Challenges/Opportunities:
The most immediate challenge for the Scholars Trust collection analysis project is the continued inaccessibility to physical collections by staff who are working remotely due to the COVID-19 pandemic. Some have expressed concern with committing to retain titles without a physical validation of holdings and condition and are review their list of nominated titles as time and resources permit. The review of titles is expected to continue well into the new year.

On a positive note, this challenge has also proved to be an opportunity for libraries to work on data clean-up activities to correct holdings statements and uniformly format item records as part of work-at-home activities. This work greatly enhances the data quality of Scholars Trust holdings and the registration of our commitments in CRL’s PAPR registry.

The inaccessibility to physical collections has also highlighted the value of shared print programs in making these resources available and accessible online. The Rosemont Alliance developed a short video that speaks well to this issue, available at: https://rosemontsharedprintalliance.org/

The two-year Mellon-funded grant to OCLC and CRL to modify the infrastructure of WorldCat and PAPR to enable registration of print serial retention commitments came to a close in June 2020. Each of the Rosemont Alliance shared print programs have representatives on the OCLC Shared Print Advisory Board which oversees development related to the registration of shared print holdings. Infrastructure enhancements are designed to streamline the retention registration process, facilitate synching of data between Worldcat and PAPR and improve discovery of retained titles. Rosemont Alliance colleagues from both the EAST and WEST programs continue to assist in the beta testing the new systems.

As an extension of the decision support tool investigations of the Rosemont Alliance, the California Digital Library (CDL), the Center for Research Libraries (CRL), & HathiTrust formed a Collaborative in January 2020 to envision an interconnected and open infrastructure that embeds shared print more completely in library services and operations. The Collaborative recently announced the release of an openly accessible collection comparison tool using the retention commitments and trusted digital holdings registered in PAPR. See http://papr.crl.edu/tools/compare for more information.

Outreach and Communication
• Scholars Trust Governing Council held a virtual meeting, October 22, 2020.
• A Town Hall e-meeting was held on September 16, 2020. Town Hall meetings provide a forum to share the progress on current initiatives and operations and to elicit further feedback from all participating libraries. Two are held each year, and recordings are archived on ASERL website.