



Town Hall e-Meeting

Wednesday, July 28, 2021

1pm-2pm ET | Noon-1pm CT

Welcome!

Agenda

1. Welcome
2. Scholars Trust Program Updates
 - FLARE
 - WRLC
 - ASERL
3. Rosemont Shared Print Alliance Update
 - 2022-2024 Strategic Directions, Revisions to Mission & Vision
 - Last Known Copy Initiative
4. Journal Retention & Needs Listing [JRNL]
5. Announcements | Open Mic



Program Updates

FLorida Academic REpository

Ben Walker



Mark Jacobs

WRLC Single Copies



- Shared Copy Policy – January 2008
- A journal volume becomes shared when a second copy is transferred to the WRLC Shared Collections Facility
- Item record is updated with a shared copy location
- The second copy is recycled
- WRLC has 9,299 shared copies

WRLC Single Copies



- 10,892 journal titles are not shared
- No duplicate copy of a specific volume was transferred to the SCF. E.g., AU vols. 1-10, GW vols. 11-50
- Created summary holdings statements
- Compared against shared print retention commitments using the new CDL/CRL/ HathiTrust analysis tool



WRLC Single Copies

- 793 are not currently held in any indexed shared print repository
- Another 1,559 titles are in one shared print program, most in HathiTrust
- 1,404 titles are held by two shared print programs
- 40% of the titles are held by two or fewer shared print programs
- FY22 initiative will review and decide on retention commitments



Cheryle Cole-Bennett

ASERL Libraries in Scholars Trust

1. Emory University, 3,966 (+1,879)
2. Georgia Tech, 2,453 (+500)
3. University of North Carolina - Chapel Hill, 1,762
4. University of Georgia, 1,550
5. University of Florida, 1,161 (+719)
6. Duke University, 971 (+24)
7. University of Alabama, 740 (+616)
8. University of South Carolina, 589 (+34)
9. National Agricultural Library, 488
10. William & Mary, 484
11. North Carolina State University, 436 (+9)
12. University of Kentucky, 384 (+159)
13. Virginia Tech, 372 (+5)
14. Florida International University, 302
15. Georgia State University, 229
16. University of Tennessee, 228 (+112)
17. Vanderbilt University, 211 (-9)
18. Wake Forest University, 180
19. University of Louisville, 162
20. Virginia Commonwealth University, 154
21. Tulane University, 149
22. University of Memphis, 143
23. University of North Carolina – Charlotte, 129 (+64)
24. Florida State University, 66
25. Louisiana State University, 65
26. Auburn University, 56
27. Johns Hopkins University, 53
28. East Carolina University, 50 (+1)
29. University of Virginia, 47
30. University of Mississippi, 28
31. University of North Carolina – Greensboro, 19
32. Mississippi State University, 3
33. Clemson University, 2
34. George Mason University, *No chosen titles*
35. University of Miami (title counts included in FLARE)

Program Collection Growth

Program	2019	2020	2021
ASERL	7,681	12,987	17,632
FLARE	31,776	31,758	31,753
WRLC	4,969	9,299	9,299
	<hr/>	<hr/>	<hr/>
	44,426	54,044	58,684

4,640 additional titles

ASERL CRL Collection Analysis

1. U-Georgia, 1342
2. U-Florida, 683
3. U-Alabama, 662
4. U-Virginia, 538
5. Florida International, 335
6. East Carolina, 213
7. Georgia Tech, 196
8. U-Kentucky, 196
9. Emory, 155
10. Vanderbilt, 134
11. UNC – Charlotte, 120
12. NC State, 119
13. Georgia State, 102
14. U-Tennessee, 97
15. U-Central Florida, 54
16. U-South Carolina, 38
17. U-Louisville, 14
18. Duke, 1
19. Tulane, 1
20. Auburn
21. Clemson
22. George Mason
23. Johns Hopkins
24. Louisiana State
25. Mississippi State
26. U-Memphis
27. U-Mississippi
28. UNC - Chapel Hill
29. UNC - Greensboro
30. Virginia Tech
31. Virginia Commonwealth
32. Wake Forest
33. William & Mary

5,000 Titles Committed for Retention

OCLC Shared Print Registration

- OCLC/CRL Mellon Grant (2018-2020) shared print data infrastructure project
- A centralized system for batch registration of shared print retention commitments in WorldCat and systematically syncing to PAPER
 - User and/or Agent Registration
- Discovery in Connexion, WorldCat Discovery, WorldShare Collection Manager, and WorldShare Record Manager

Registering your ASERL Scholars Trust retention commitments in Worldcat

<http://www.aserl.org/programs/j-retain/>

News

[Registration of ASERL Scholars Trust Retention Commitments in Worldcat](#)

[Scholars Trust Update for PAN \(Print Archive Network\), June 2021](#)

October 31, 2021



Program Updates

2022-2024 Strategic Directions, Revisions to Mission and Vision

John Burger

Proposed Revisions: Mission & Vision statements

The Vision: **We** ensure the preservation and availability of print journal literature **to enable research, teaching, and learning.**

The Mission: **We** collaboratively develop, manage, and coordinate the identification, retention, registration, discovery of, and access to a shared, distributed collection of print **academic** journals in **North America.**

Proposed Revisions: Strategic Directions

1. Collection Growth and Security: To establish milestones for collection growth and retention, including adding new titles and more copies to the collective collection.
 - A. To further enhance the completeness and security of the scholarly record, we will continue to add new journal titles and fill gaps in the titles we retain.
 - B. We will also explore ways we can seek out new titles that reflect diversity of scholarship.

Proposed Revisions: Strategic Directions

1. Collection Growth and Security:

- C. We will focus on optimizing the redundancy and the geographic distribution of the titles we retain.
- D. We will utilize data from the Last Known Copies pilot project to draft a process that allows participating libraries to efficiently evaluate and make retention decisions for relevant materials that seem to be rare or unique within Rosemont, so they may be added to the collective collection.

Proposed Revisions: Strategic Directions

2. Shared Policies or Guidelines: To align operational policies for registration of retention commitments, preservation actions, discovery of, and access to shared print journal collections.
 - A. 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 shared policies or guidelines, including the Access Principles.
 - B. We will adopt a common metadata standard to disclose retention commitments and preservation actions. The standard will provide common guidelines for disclosing retention commitments in OCLC WorldCat, PAPER, and other print journal registries as appropriate.

Proposed Revisions: Strategic Directions

2. Shared Policies or Guidelines:

- C. We will adopt validation guidelines to describe expected actions and outcomes when completeness and condition are reviewed at the volume level.
- D. We will establish basic expectations and guidelines for filling gaps in shared print journal collections.
- E. We will develop ways to track and report usage of the collective collection.
- F. When long-term retention of a desired title or item is not possible by the original owner, we will identify and share information about processes that facilitate the transfer of materials between participating libraries, including expectations for their long term retention.

Proposed Revisions: Strategic Directions

3. Advocacy & Engagement with Other Programs:

- A. We will explore potential partnerships with National Libraries, the Partnership for Shared Book Collections (the Partnership), and other programs in the US and Canada to further grow the collective collection of retained scholarly materials.
- B. We will work with the Partnership and other programs to develop messaging and outreach activities that emphasize the importance of Shared Print programs to audiences within libraries and higher education and to external audiences.

Proposed Revisions: Strategic Directions

4. Infrastructure:

- A. We will work with partners to support the ongoing development of important infrastructure tools that assist in decision-making for our programs and our constituent libraries, including possible de-accessioning decisions by local libraries based on the availability of the Rosemont collective collection.

Proposed Revisions: Strategic Directions Poll

Poll questions will be available to those
unable to attend this session

Proposed Revisions: Strategic Directions Polling

Name one thing you believe a shared print alliance (e.g., Rosemont) could do to help your library.

Please share your response in chat

Last Known Copy Initiative

Mark Jacobs

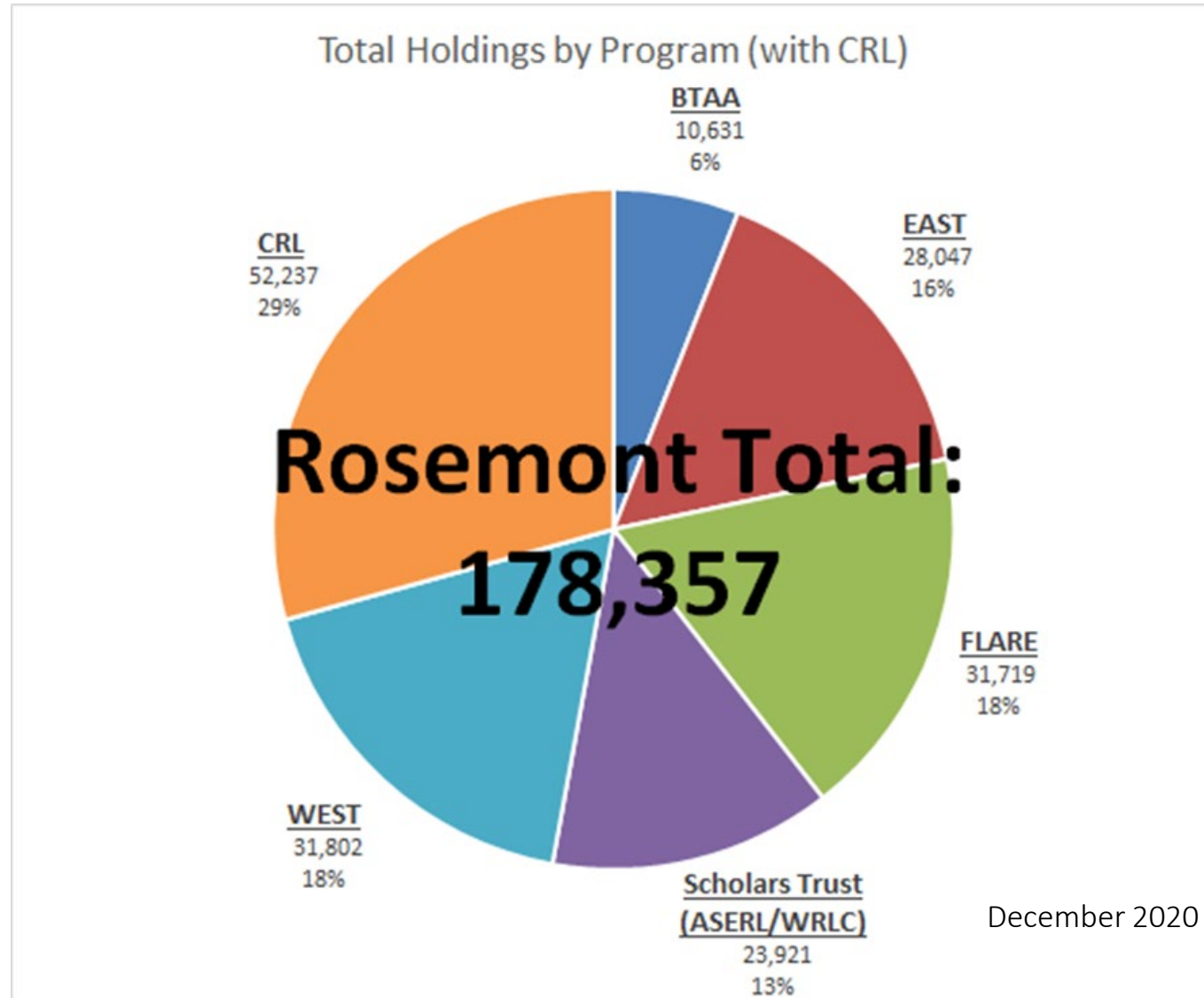
Last Known Copy Initiative



- Rosemont Alliance formed in 2015



Last Known Copy Initiative



Last Known Copy Initiative



- Rosemont Alliance Vision: “To ensure the preservation and availability of print journal literature.”
- Last Copy Principles and Guidelines - 2020
 - Participants in the Rosemont Shared Print Alliance seek to ensure that last or scarcely held print journal titles (i.e., titles with three copies or fewer held by libraries in the Rosemont Alliance) are preserved and accessible for future scholars.

Last Known Copy Initiative



Last Known Copy Working Group

Rebecca Crist, BTAA

Matthew Revitt, EAST

Tabatha Pursley, FLARE

Mark Jacobs & Cheryle Cole-Bennett, ST

Alison Wohlers, WEST

Mary Miller, University of Minnesota (BTAA)

Steve Smith, UMass Boston (EAST)

Jay Forrest, Georgia Tech (Scholars Trust)

Jesse Silva, UC Berkeley (WEST)

Last Known Copy Initiative



- Data from CRL and WEST print journal collection analyses for BTAA, EAST, Scholars Trust (ASERL), WEST
 - Excludes FLARE and Scholars Trust (WRLC)
- Over 300,000 titles are held by one library in the Rosemont Alliance
- 61,538 titles for which only one copy was reported in OCLC (U.S. holdings)
- Data ingested into Tableau

Last Known Copy Initiative

- Tableau



tableau⁺public GALLERY AUTHORS BLOG RESOURCES ACTIVITY ABOUT SIGN UP SIGN I

< Eastern Academic Scholars' Trust - Profile

☆ Favorite Make a Copy

Titles	Holding Institution	Count	Vizes	Overview
Title Holdings				
Count: 61,538				
Title	Oclc	Holding Institution	Publisher	Program
Meadowscripts	28087405	University of North Carolina..	Residents of Carol..	ASERL Scholars Trust
Meals from the market	1040693731	University of North Carolina..	Durham Central P..	ASERL Scholars Trust
Mean Machine	228068447	Ohio State University Librar..	S.Q.P. Inc.	BTAA
Meanjin papers	49954490	University of Minnesota	Meanjin Press	BTAA
Means site work & landscape cost data	190834883	Tufts	R.S. Means Co.	EAST
Measurement control and diagnostics in the papermakin..	768480091	North Carolina State Univer..	Pira International	ASERL Scholars Trust
Meat	32557143	University of Illinois Library	Null	BTAA
Meat cutters news	654818099	Georgia State University	Local 525, Amalga..	ASERL Scholars Trust
Meat goat monthly news: magazine of the U.S. meat goa..	181156660	North Carolina State Univer..	Wesner Media	ASERL Scholars Trust
Meat hygiene manual =: Manuel de l'hygiène de viande	1080972621	University of Minnesota	Agriculture Canad..	BTAA
Meat judging contest	41458399	Mississippi State University	Creative Educatio..	ASERL Scholars Trust
Meat products news letter	725396534	Louisiana State University	Louisiana Depart..	ASERL Scholars Trust

LC
(All) ▾

LC - 2 Letter
(All) ▾

1st Year of Publication
(All) ▾

Language (group)
(All) ▾

Language
(Multiple values) ▾

Country (group)
(All) ▾

Last Known Copy Initiative - Program Distribution



Program	Total Last Copies in Final Data Set
ASERL, Scholars Trust	29,101
BTAA	30,043
EAST	2,172
WEST	231

- Libraries with last known copies ranged from holding one to over 10,000 titles

Last Known Copy Initiative - Pilot Project Plan



- Identify small group of Rosemont Alliance libraries representing various programs and projected participation levels
- Update records with retention commitment
- Disclose commitment in PAPER & WorldCat
- Pilot participants record information on factors that influenced their decision-making to develop best-practices

Last Known Copy Initiative - Pilot Recommendations



- All 61,538 last known copies should be considered for retention by the library holding the title.
- “Completeness” should not be considered as these appear to be the only extant copies.
- Libraries are encouraged to retain first and opt out of commitments later.

Last Known Copy Initiative - Pilot Project



- 14 libraries selected
 - Tier 1: Four libraries (two each from BTAA & ASERL/Emory & UGA) with 1000+ titles
 - Tier 2: Six libraries (two each from BTAA, ASERL/UF & JHU, EAST) with 100-999 titles
 - Tier 3: Four libraries (one each from BTAA, ASERL/UNC-C, EAST, WEST) with < 100 titles

Last Known Copy Initiative

- Results



- Libraries appreciated learning that they may have a last known journal copy
- Pilot participants agreed that last known journal copies should be retained
- Some libraries chose to retain titles now without further analysis or investigation

Last Known Copy Initiative

- Results



- Data quality varied widely
 - Library staff know their collections and were able to identify titles that were not candidates
 - 'Errant' titles included monographic series, brief records, cataloging errors, reprints, withdrawn titles, titles in Special Collections and one title widely held in Europe but not in the US
- Actual last known copies ranged from all the titles identified for one library to about half the titles identified

Last Known Copy Initiative

- Next Steps



- Executive Committee approved expanding the project to all Rosemont Alliance libraries
- LKC Working Group will:
 - Provide a more specific description of what is in and out of scope for this project
 - Determine whether to include Special Collections
 - Investigate whether monographic series can be excluded from the dataset
 - Provide guidance on what information should be included about the retention commitment in the MARC 583 field

33 ASERL Scholars Trust Libraries | 29,101 Titles



Auburn University	1,292	University of Florida	790
Clemson University	102	University of Georgia	3,004
College of William and Mary	556	University of Kentucky	402
Duke University	3,197	University of Louisville	65
East Carolina University	206	University of Memphis	24
Emory University	2,708	University of Mississippi	731
Florida International University	271	UNC Chapel Hill	6,232
George Mason University	53	UNC Charlotte	17
Georgia Tech	142	UNC Greensboro	83
Georgia State University	1,036	University of South Carolina	1,526
Johns Hopkins University	203	University of Tennessee	376
Louisiana State University	1,265	University of Virginia	506
Mississippi State University	617	Vanderbilt University	517
North Carolina State University	870	Virginia Commonwealth	32
Tulane University	535	Virginia Tech	605
University of Alabama	901	Wake Forest University	138
University of Central Florida	99	Total:	29,101

JRNL

Journal Retention & Needs Listing

Current Activities

- New Shared Print Program - EAST
- Gap Enhancement [Demo](#)
- LibGuide - <https://guides.uflib.ufl.edu/JRNL>

Future Activities

- New search filter
– Facilities

- Full Service Library
- High Density (Harvard Model) Storage
- On Campus, Closed Stacks
- Other Storage

Please describe the storage facility

FacilityType	(No column name)
NULL	4
Commercial remote storage facility	1
Commercial Storage Facility	1
Full Service Library	47
High Density (Harvard Model) Storage	25
Off Campus storage	1
Off campus, closed stacks, retrievable/circulating	1
Off Site Normal Density Secured Storage	1
Off-Site Storage Facility	2
Offsite Library Annex	1
On Campus, Closed Stacks	13
Remote Facility, closed to the public	2
Remote facility, stacks are closed to the public	1
Remote facility, stacks closed to public	1
Remote facility, stacks closed to the public	1
Swem Off-Site Storage (SOSS)	1

Future Activities

- Google support – http vs https

The Google login process requires the secure HTTPS version of this application.
Please make sure your browser is pointed to: <https://apps.uflib.ufl.edu/aserlretention/>





Other News?

Scholars Trust Governing Council e-Meeting

Monday, October 4, 2021