WEST Member Meeting

July 29, 2021
12:30-2:00 pm PT
Meeting Roadmap

❖ Brief WEST Refresher
❖ Lessons from Library Collaborations - guest speaker Roger Schonfeld
❖ Select Program Updates
  ➢ New WEST Vision, Mission, and Guiding Principles
  ➢ New WEST Systems Developments
❖ Closing Remarks
Brief WEST Refresher
WEST Refresher - What we do

Collaborate across the western regional United States to build a shared, retrospective print collection of journals.

Our objectives:

➔ Preserve the scholarly print record through distributed retention commitments and targeted consolidation of journal holdings
➔ Provide access to retained materials
➔ Create opportunities to reallocate library space

Together, WEST members are retaining and providing access to over 830,000 volumes across over 32,000 unique titles.
WEST Refresher - How we do it

❖ **Analyze** our collective serial holdings

❖ **Target our effort and resources** based on risk for loss of content

❖ Explicitly **record** the retentions and **disclose** them through public registries

❖ Provide tools for **local decision-making and comparison**

❖ **Collaborate** with the wider community
WEST Refresher - Who we are

65 institutions west of the Mississippi
- 6 Archive Builders
- 34 Archive Holders
- 25 Non-Archive Holders
6 Past members who remain Archive Holders
Lessons from Library Collaborations

Roger Schonfeld
Program Director, Libraries, Scholarly Communication, and Museums at Ithaka S+R

Introduction from Dena Hutto
Norman F. Carrigg College Librarian, Reed College
Chair, WEST Executive Committee

Public Discussion & Question Document: https://tinyurl.com/79m5cdvk
See meeting recording for presenter slides:
https://vimeo.com/583058124
Ask a question or make a comment!

- Unmute
- Chat
- Public discussion document - https://tinyurl.com/79m5cdvk
New WEST Vision, Mission, and Guiding Principles

Michael Levine-Clark
Dean, University of Denver Libraries
WEST Executive Committee
Why?

Articulate a foundation to guide:
❖ program evaluation
❖ strategic expansion or changes in services, scope, and membership
❖ cooperation with other organizations
With thanks to the Core Drafting Group

Executive Reps

Melissa Desantis, Strauss Health Sciences Library, University of Colorado
Michael Levine-Clark, University of Denver

OCC Reps

Jill Emery, Portland State University
Molly Strothmann, Oklahoma State University

Program Support

Alison Wohlers, WEST
Vision & Mission

**Vision:** Reliable, innovative and lasting preservation to ensure ready availability of the print scholarly record through a distributed network of committed and trusted partners sharing responsibility, stewardship, and decision-making.

**Mission:** To collaboratively develop, manage and coordinate the identification, retention, registration, discovery of, and access to a shared, distributed collection of print content across libraries.
Guiding Principles

● Shared Responsibility and Stewardship

Our top priority is preserving and making accessible the scholarly record both for our members, and also for the greater good.

● Trust and Transparency

Our work is built on a foundation of trust among libraries, supported by complete and accessible documentation and exceptional communication with member libraries.

● Inclusion and Diversity

We value diversity and inclusivity in our collaboration. We invite participation from the broadest range of libraries and individuals possible to meet our mission. We are committed to preserving a collective collection that represents the diversity of the communities we serve.
Guiding Principles, continued

● **Equity**

We are committed to pursuing equitable models in stewarding the collective collection - from selection, to discoverability, to access, to governance.

● **Collaboration**

We welcome partnerships with organizations that have a similar mission to preserve the scholarly record.

● **Sustainability and Resilience**

We recognize that librarianship is a dynamic and ever-changing landscape. We commit to anticipating change, adapting to new needs, and expanding the range of WEST members and communities we serve.
Next steps

❖ Open comment period: July 30 - September 30
❖ Drop in hours with members of the core drafting group, if desired
❖ Membership-wide vote will be administered in the late fall (in combination with WEST Executive Elections for 2022)
Questions?
New WEST Systems Developments

Anna Striker
Shared Print Operations and Collections Analyst, WEST
AGUA Enhancements

- Biennial systems development periods alternate with collections analysis
- Prioritized foundational and innovative enhancements
- Improve analytical capabilities and provide value to members
AGUA Enhancements

- Local Discovery of WEST Archived Collections
- Collection Comparison Capabilities
- Metadata Validation and Reporting
Local Discovery of WEST Archived Collections

- **Goal:** Facilitate discovery of distributed shared collections by local users
  - Connect local users to the broader WEST collections
  - Demonstrate continued availability of titles deaccessioned locally
  - Immediate comparison of local holdings against WEST archives

- **First iteration:** MARC file now available in AGUA!

- **Future work:** With peer programs, participate in discussions with vendors to develop better native support for shared print
All Titles MARC File

Downloadable file now available on the AGUA dashboard
Local Discovery of WEST Archives

Example catalog record after loading MARC records for WEST archived collections
Collection Comparison Capabilities

❖ Expanded On Demand Collection Comparison capabilities
➢ Archived titles comparison
➢ Unarchived titles report
➢ Not Held in WEST
Collection Comparison Capabilities

- **Archived titles**
  1. New ‘completeness’ calculation (how much of the published run does the retained holdings cover?)
  2. New ‘Rosemont Archived’ field for quick identification (flag if the program is a Rosemont partner)

<table>
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<th>Archived OCLC Number</th>
<th>Archived ISSN</th>
<th>Archived Holdings</th>
<th>Completeness Validation</th>
<th>Condition Validation</th>
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Collection Comparison Capabilities

❖ Unarchived titles

➢ WEST holdings for titles not yet retained

1. ‘Completeness’ calculation (how much of the published run do the unarchived holdings cover?)
2. Count of OCLC institutions (global count of OCLC holdings)

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<tr>
<th>WEST Holding Institution</th>
<th>Title</th>
<th>OCLC Number</th>
<th>ISSN</th>
<th>Institution Holdings Statement</th>
<th>Estimated Volumes</th>
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Metadata Validation and Reporting

❖ New metadata validation processes

➢ Developed by CRL
➢ Streamlines and accelerates WEST analysis
➢ Generates detailed reports, provided back to members
Thank you to our testers!

**Member Testers**

- Discovery
  - Erika Dickey, KU
  - Shari Laster, ASU
  - Samantha Silver, MSMU

- Collection Comparison
  - Sion Romaine, UW

- Metadata Validation Reporting
  - Debra Spidal, WSU

**AGUA Development Team**

- Dana Jemison
- Jing Jiang
- Lucy Liu
- Judy Dobry
Questions?
Closing Remarks
## WEST Executive Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Institution</th>
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<tbody>
<tr>
<td>Dena Hutto (2021 Chair)</td>
<td>Reed College</td>
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<tr>
<td>Melissa Desantis (2021 Vice Chair)</td>
<td>University of Colorado Anschutz Medical Campus</td>
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<td>Mark Roosa</td>
<td>Pepperdine University</td>
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<tr>
<td>John Wenzler</td>
<td>CSU East Bay</td>
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<td>Virginia (Ginny) Steel</td>
<td>UC Los Angeles</td>
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<td>Michael Levine Clark</td>
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<td>Denise Stephens</td>
<td>University of Oklahoma</td>
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<td>Kathleen Salomon</td>
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<td>Ellen Finnie</td>
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## WEST Operations and Collections Council

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Sion Romaine</td>
<td>University of Washington</td>
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<td>Jack Maness</td>
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<td>Laura Turner</td>
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<td>Jill Emery</td>
<td>Portland State University</td>
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<td>Shari Laster</td>
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<td>Mary Grenci</td>
<td>University of Oregon</td>
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<td>Nancy Lorimer</td>
<td>Stanford University</td>
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<td>Cathy Martyniak</td>
<td>SRLF</td>
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<tr>
<td>Kerry Scott</td>
<td>UCSC</td>
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<tr>
<td>Kerri Goergen-Doll</td>
<td>Oregon State University</td>
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### Disclosure & Validation Standards

- **Anna Striker**, WEST project team
- **Cathy Martyniak**, UC Southern Regional Library Facility
- **Corrie Hutchinson**, University of Missouri
- **Debra Spidal**, Washington State University
- **Tim Converse**, UC Northern Regional Library Facility

- **Complete**
  - 2nd Symbol Recommendation
  - Updated WEST Disclosure Policy

- **Upcoming**
  - WEST Validation Standards

### Non-journal Formats

- **Alison Wohlers**, WEST project team
- **Cass Kvenild**, University of Wyoming
- **John Wenzler**, CSU East Bay
- **Kerry Scott**, UC Santa Cruz
- **Michael Brewer**, University of Arizona
- **Shari Laster**, Arizona State University
- **Joel Thornton**, University of Arkansas, Fayetteville

- **Complete**
  - Environmental scan and impact/readiness assessment
  - Refined proposals for 4 areas
  - Input from OCC

- **In progress**
  - Consult with potential collaborative partners

- **Upcoming**
  - Exec review
  - Member engagement

### Resource Sharing

- **Alison Wohlers**, WEST project team
- **Anna Striker**, WEST project team
- **John de La Fontaine**, Occidental College
- **Tim Converse**, UC Northern Regional Library Facility
- **Debra Spidal**, Washington State University (former member)

- **Complete**
  - 2nd Symbol Recommendation

- **In progress**
  - WEST Access Policy
  - Borrowing and Lending Instructions
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Thank you!

Please stay in touch with your questions and feedback.

https://cdlib.org/west/

Alison Wohlers, WEST Program Manager
alison.wohlers@ucop.edu

Anna Striker, WEST Operations and Collections Analyst
anna.striker@ucop.edu