



Western Regional Storage Trust

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

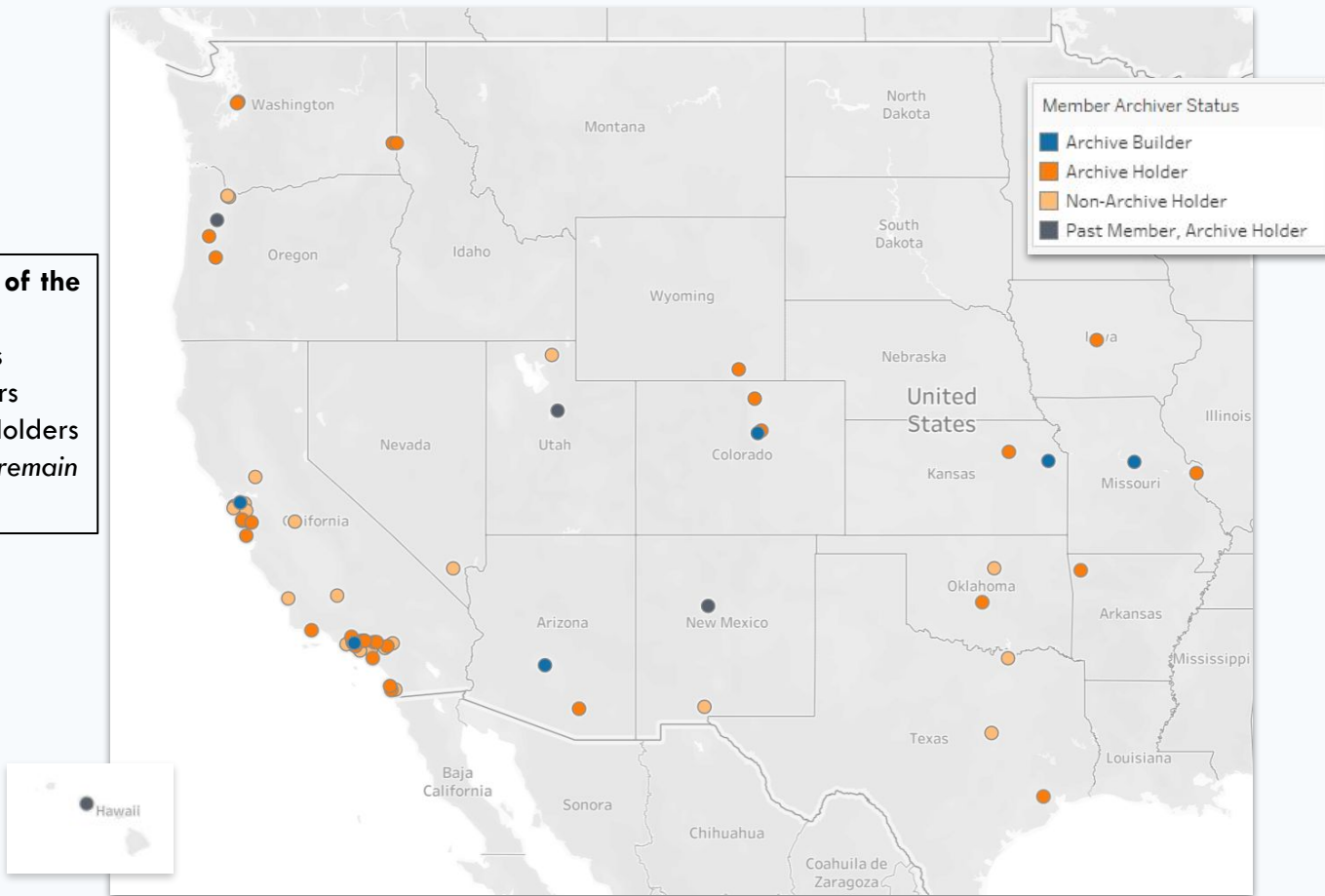
- ❖ Analyze our collective serial holdings 
- ❖ Target our effort and resources based on risk for loss of content
- ❖ Explicitly record the retentions and disclose them through public registries
- ❖ Provide tools for local decision-making and comparison
- ❖ Collaborate with the wider community



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>

Q&A

Ask a question or make a comment!

- Unmute
- Chat
- Public discussion document -
<https://tinyurl.com/79m5cdvk>



Select Program Updates



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**

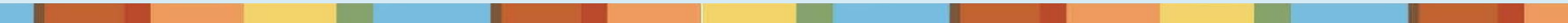
We recognize that librarianship is a dynamic and ever-changing landscape. We commit to anticipating change, adapting to new needs, and expanding the range of WEST members and communities we serve.

Next steps

Member feedback

- ❖ 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



AGUA Development Phase 5

- ❖ 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

Western Regional Storage Trust | AGUA

AboutAnna Striker

Welcome to AGUA

WEST Updates

Welcome to AGUA! AGUA is a web based analysis and decision support system that facilitates shared print collaborative activities and local collection management. If you've visited AGUA before, you'll notice we've had a bit of a refresh to the interface, although the underlying functionality remains the same. We hope you enjoy the visual updates! Please send any questions or comments to [WEST Support Team](#).

Functions

Upload Bibliographic and Holdings Data

- Upload Your File
- Set Storage Location and Exclusion Flags

Reports and Downloads

Collection Downloads

- All Titles Archived by WEST Report
- All Titles MARC File

Collection Comparison

- Collection Comparison Reports
- On Demand Comparison Report

Contacts

Contact WEST Staff

Institution Contact Roster

All Titles MARC File

Downloadable file now available on the AGUA dashboard


LIBRARIES
 MOUNT SAINT MARY'S UNIVERSITY


[New Search](#)
[Print](#)
[Help](#)
[Login](#)

[My Library](#)
[Help Topics](#)
[Features](#)

[Request](#)
[Add to My Lists](#)
[Add to Bag](#)
[MARC Display](#)

RECORD #

☐ Limit search to available items

 **Book Cover**

Title Computer graphics marketplace.
Imprint Phoenix, Ariz. : Oryx Press, 1-
Connect to
WEST Program Statement
WEST Archived title; Not available for immediate access. Request from InterLibrary Loan

 **Periodical**

Copies

Descript volumes ; 28 cm
Frequency Annual
Pub Date 1981-
Subject Computer graphics -- Periodicals.
ISSN 0278-2774

Resources
[More Information](#)


 [Permanent Link](#)

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

Functions	Reports and Downloads	Contacts
Upload Bibliographic and Holdings Data	Collection Downloads	Contact WEST Staff
<ul style="list-style-type: none">• Upload Your File	<ul style="list-style-type: none">• All Titles Archived by WEST Report ↓	Institution Contact Roster
<ul style="list-style-type: none">• Set Storage Location and Exclusion Flags	<ul style="list-style-type: none">• All Titles MARC File ↓	
	Collection Comparison	
	<ul style="list-style-type: none">• Collection Comparison Reports	
	<ul style="list-style-type: none">• On Demand Comparison Report	
	Archiving Reports	

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)

				1		2	
Archived OCLC Number	Archived ISSN	Archived Holdings	Completeness Validation	Condition Validation	Estimated % of Title Archived	Archiving Program	Rosemont Archived
1205158	0004-8658	1(1968)-38(2005)			70.37	WEST, WEST Bronze	
	0004-8658	2002-2010				PORTICO	
	0004-8658	v.43-v.47 (2010-2014)				CLOCKSS	
	0770-2965	v.27:no.5-v.63:no.3 (Sep,				HARV@JSTOR	
1205196	0770-2965	v.29-v.39 (1976-1986)	Missing:Missing v.34, no.5		25	CRLSerials	
1205196	0770-2965	v.28(1975)-v.32(1979); Ir			11.36	Scholars Trust, FLARE	Y
1205196	0770-2965	35(1982)-58(2005)	missing volumes:missing v.27-		54.55	WEST, WEST Gold	
1208048	0024-1415	v.1 (1947)-v.54 (2000)			72	EAST	Y
1208048	0024-1415	v.1-v.70(1947-2016)			93.33	EAST	Y
1208048	0024-1415	t.1(1947)-t.17(1963), t.21			44	Scholars Trust, FLARE	Y
1208048	0024-1415	v.1 (1947)-v.68,no.3-4 (2			90.67	Scholars Trust, WRLC	Y
1208048	0024-1415	v.1(1947)-v.74(2020)			98.67	WEST, WEST Bronze	

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)

WEST Holding Institution	Title	OCLC Number	ISSN	Institution Holdings Statement	Estimated Volumes	% of Published Run Held at WEST Institution	Duplication in WEST	Count of OCLC Institutions
WAU	YÄ±llÄ±k / T.D.İ	4264420		1943/1944-194	4	100	4	16
ZAP	YÄ±llÄ±k / T.D.İ	4264420		1943-46	4	100	4	16
CLU	The quarterly o	4412219	0163-5565	v.20-39(1961/2	21	80.77	5	59
COU	The quarterly o	4412219	0163-5565	26-36, v.30,197	12	46.15	5	59
CUN	The quarterly o	4412219	0163-5565	v.22(1963)-v.40	19	73.08	5	59
CUX	The quarterly o	4412219	0163-5565	v.32-39(1973-1	9	34.62	5	59
WAU	The quarterly o	4412219	0163-5565	28, 29-35, 36, 3	12	46.15	5	59
WAU	Bulletin of the N	5212270	0163-5565	5, 6-10, 11, 12,	8	42.11	1	28
AZS	Semiosis.	5453520		no.1(1978)-24(13	29.55	5	37

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

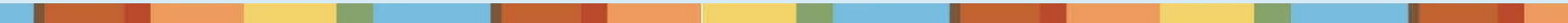
Metadata Validation Reporting

- ❖ Debra Spidal, WSU

AGUA Development Team

- ❖ Dana Jemison
- ❖ Jing Jiang
- ❖ Lucy Liu
- ❖ Judy Dobry

Questions?





Closing Remarks

WEST Executive Committee

Dena Hutto (2021 Chair)	Reed College
Melissa Desantis (2021 Vice Chair)	University of Colorado Anschutz Medical Campus
Mark Roosa	Pepperdine University
John Wenzler	CSU East Bay
Virginia (Ginny) Steel	UC Los Angeles
Michael Levine Clark	University of Denver
Denise Stephens	University of Oklahoma
Kathleen Salomon	Getty Research Institute
Ellen Finnie	CDL Administrative Host

WEST Operations and Collections Council

Sion Romaine	University of Washington
Jack Maness	University of Denver
Laura Turner	University of San Diego
Molly Strothmann	Oklahoma State University
Jill Emery	Portland State University
Shari Laster	Arizona State University
Mary Grenci	University of Oregon
Nancy Lorimer	Stanford University
Cathy Martyniak	SRLF
Kerry Scott	UCSC
Kerri Goergen-Doll	Oregon State University

WEST Working Groups

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



Thank you!

Please stay in touch with your questions and feedback.

<https://cdlib.org/west/>

Alison Wohlers, WEST Program Manager

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Anna Striker, WEST Operations and Collections Analyst

anna.striker@ucop.edu