



Western Regional Storage Trust

WEST Program Refresher & Archiving Info Session

January 19, 2022

10-11am PT



Agenda

WEST Program Refresher (First 30 minutes)

- History
- Vision, Mission, & Principles
- Key Features
- Membership & Roles
- Governance
- Collaborations

WEST Archiving Info Session (Second 30 minutes)

- Archive Types
- Archiving Progress
- Analysis & Archiving Timeline
- Cycles 12 & 13
- Focus On Scarce/Unique
- Archive for WEST!

Info and Communications
Upcoming events



WEST Program Refresher



A Brief History

2009-2010	2011-2013	2014-2016	2016-2018	2019-present
Planning Phase <hr/>	Phase 1 - Implementation <hr/>	Phase 2 - Expansion <hr/>	Transition to sustainability <hr/>	New Directions & Opportunities <hr/>
Outlined business model, validation standards, and disclosure plan	Established shared print collections at multiple libraries and storage facilities	Extended the work begun in Phase 1	Became fully member sustained; co-founded national collaboration (Rosemont)	Refining, enhancing, expanding opportunities and value



Vision, Mission, & Guiding Principles

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, and registration of a shared, distributed collection of print content across libraries, thus enabling discovery, access, and informed decision-making by member institutions.

Guiding Principles

Shared Responsibility and Stewardship

Trust and Transparency

Inclusion and Diversity

Equity

Collaboration

Sustainability and Resilience



Key Features of WEST

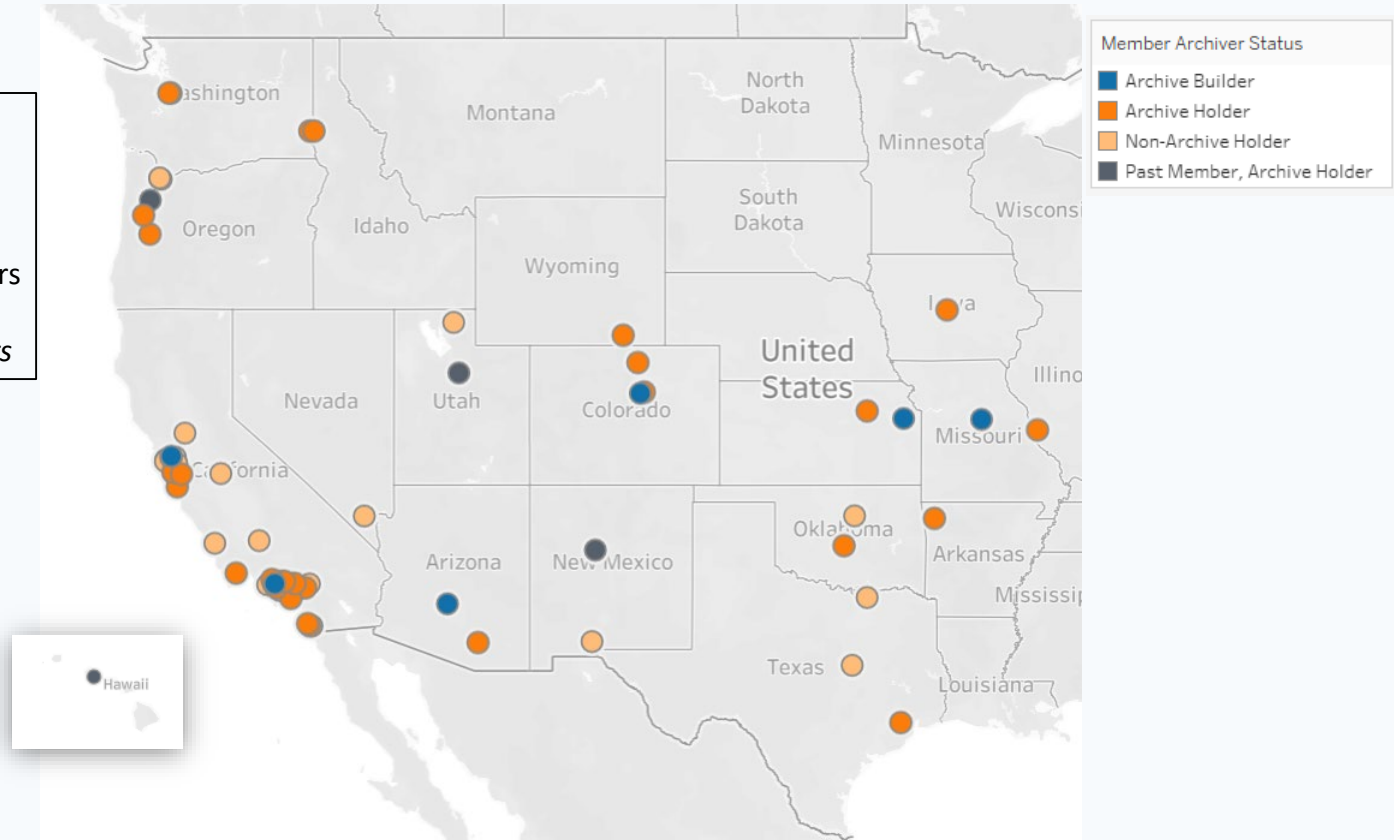
- ❖ Biennial collection analysis, titles prioritized by risk categories
- ❖ Distributed journal archives held in storage facilities and libraries
- ❖ Access for all WEST members
- ❖ Analysis tools for member collection comparison and decision making
- ❖ In-house development resources to meet member needs
- ❖ Regular program assessment
- ❖ Collaboration with the wider community to develop policies, practices, and technology that support the responsible management of our print collections at the national scale



Membership

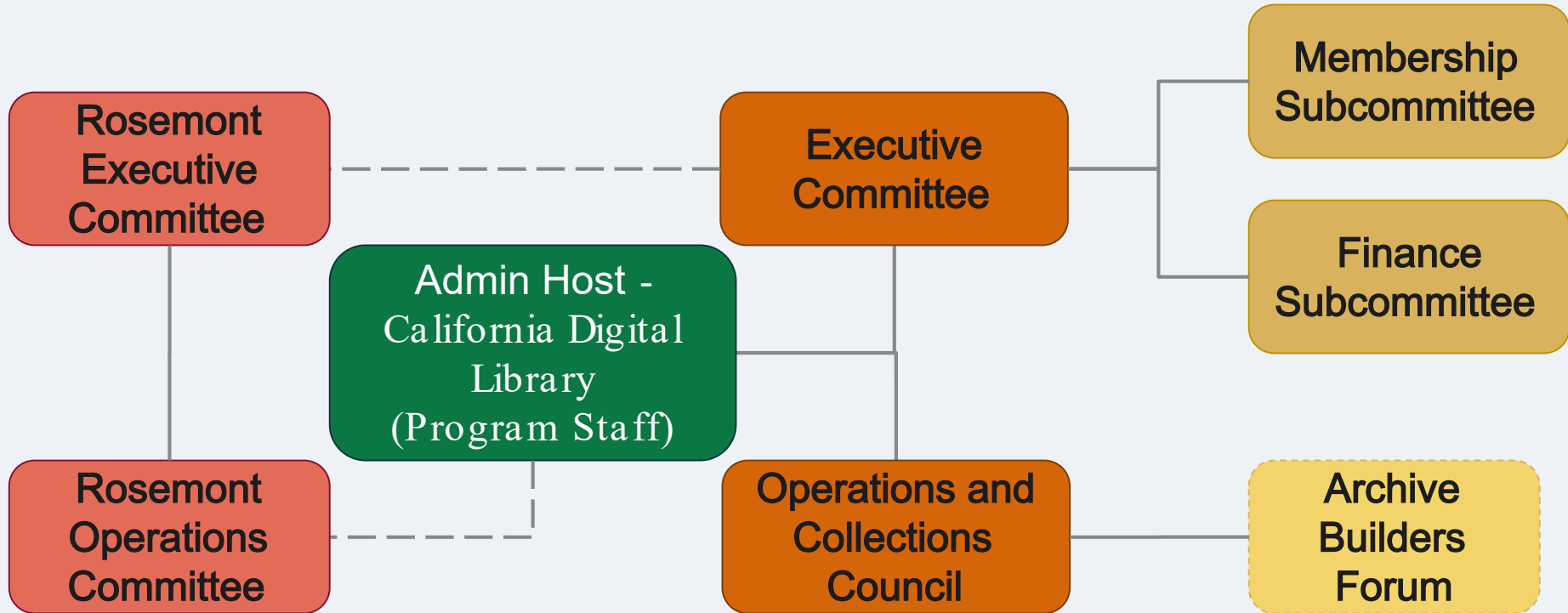
65 institutions west of the Mississippi

- 6 Archive Builders
- 34 Archive Holders
- 25 Non-Archive Holders
- 6 Past members who remain Archive Holders





WEST Governance



The logo for WEST Working Groups is a vertical bar on the left side of the page, composed of several colored rectangular segments: orange, blue, yellow, green, and red. At the top of this bar is a small white speech bubble icon.

WEST Working Groups

Disclosure & Validation Standards

Charge: Review and revise as necessary the WEST Disclosure Policy and Validation Standards

Non-journal Formats

Charge: Take up the question of expanding WEST's scope to include non-journal formats (analog or digital) and/or to collaborate with non-journal shared print programs.

Resource Sharing

Charge: Review and revise, as necessary, the WEST borrowing and lending documentation and lending statistics reporting practices



WEST and Rosemont



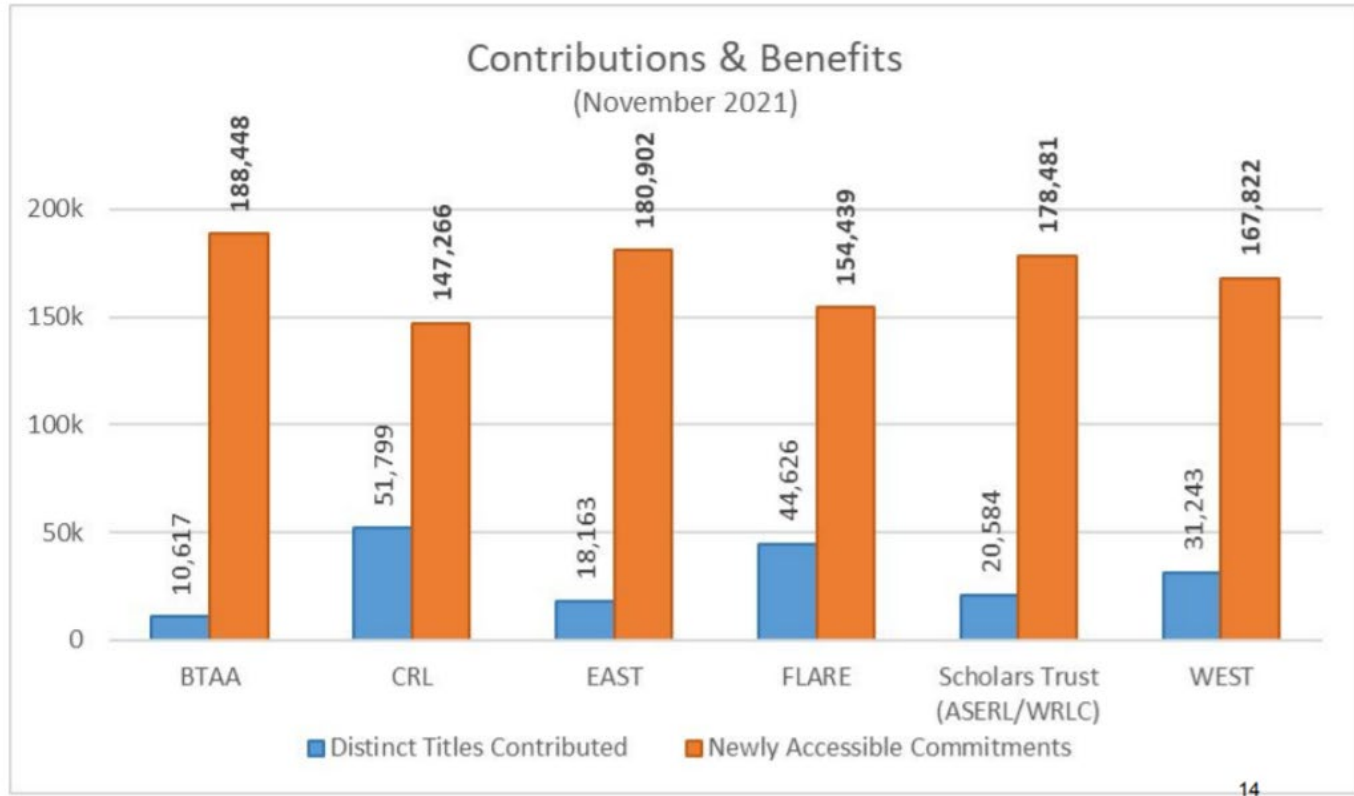
The Vision

To ensure the preservation and availability of print journal literature.

Member Programs

BTAA		CRL		EAST
FLARE				WEST
Scholars Trust (ASERL & WRLC)				

Collection Growth





WEST and Rosemont



Areas of Focus for 2022

- ❖ Potential coordination with storage partners
- ❖ Guidelines for gap-filling across programs
- ❖ Cross-program resource sharing
- ❖ Last Known Copy Initiative
- ❖ Collaboration with other national partner organizations



Beyond Rosemont

Connections to monograph shared print programs



Advancing shared print's transition to a new phase of integration across the collections lifecycle





Questions?



WEST Archiving Info Session



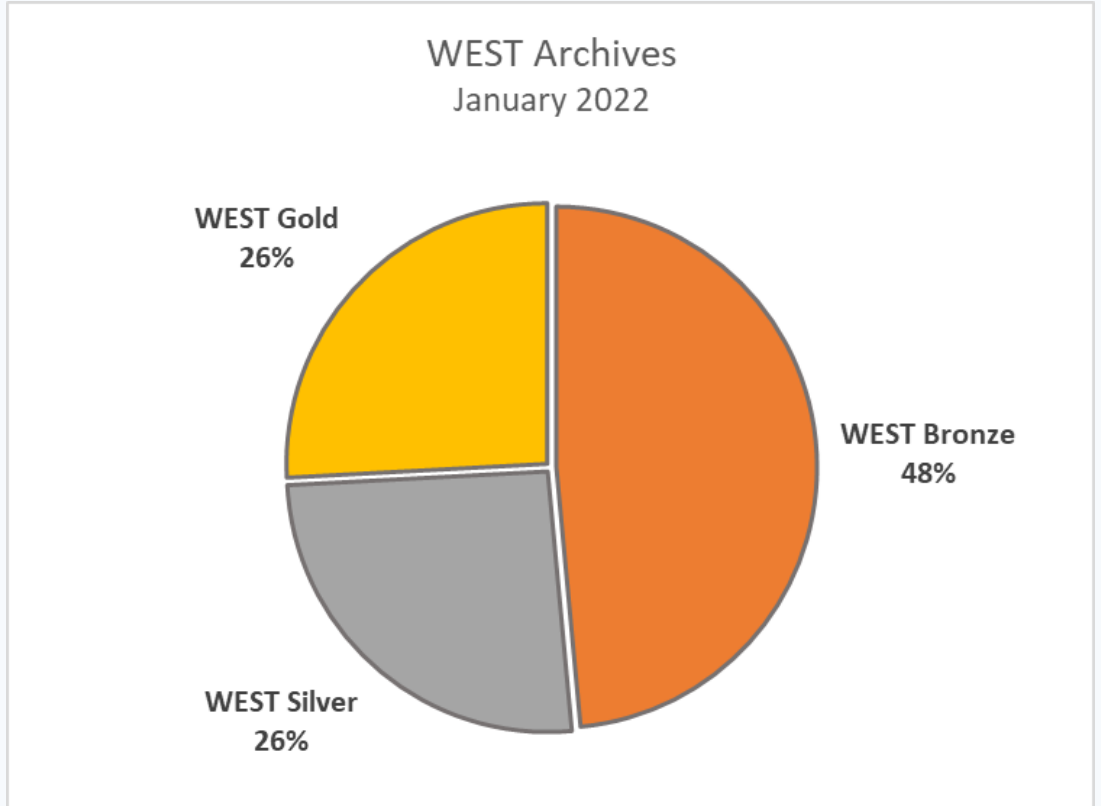
WEST Archive Types

<i>Characteristic</i>	<i>Bronze</i>	<i>Silver</i>	<i>Gold</i>
Risk profile of title	Low risk	Moderate risk	Higher risk
Physical holdings verified, summary holdings updated	Not required	Yes	Yes
Validation standards	None required	Volume-level Completeness only	Issue-level Completeness and Condition
Gap filling required?	No (at holder's discretion)	Yes (active)	Yes (active)
Storage	Open stacks or storage	Secure storage facility	Secure storage facility
Disclosure	Batch loaded, LHRs w/ 583 fields	LHRs w/ 583 fields, + outcomes of validation	LHRs w/ 583 fields, + outcomes of validation

Archive Type = Level of Archiving Effort

Archiving Progress Cycles 1-10

WEST Archived Holdings	
WEST Bronze	17,011
WEST Silver	8,988
WEST Gold	9,061
Grand Total	35,060





WEST Collections Analysis & Archiving Timeline

Cycles 12 & 13 Steps:

- ❖ Unarchived holdings submission - *complete!*
- ❖ Holdings location review - *in progress*
- ❖ Collections analysis - Spring-Summer 2022
 - Automated quantitative analysis by AGUA enhanced by qualitative analysis and rebalancing results
- ❖ Archiving proposals review and commitment - Fall 2022
- ❖ Cycle 12 archiving begins - Fall 2022



Cycles 12 & 13

Previous Cycles

- ❖ Participation limited to Full Members
- ❖ Focus on widely-held titles
- ❖ Archiving proposals limited to Archive Holders/Builders

Cycles 12 & 13

- ❖ Participation open to ALL members
- ❖ Focus on scarcely-held and unique titles
- ❖ Archiving proposals open to ALL members (does not commit you to archiving!)



Why scarce and unique materials?

- ❖ Success capturing widely-held titles = steady drop in average duplication across membership
- ❖ System enhancements that support new insights into WEST member collections and comparison against other groups
- ❖ Rosemont Last Known Copy Initiative Pilot Project
- ❖ Protecting the full print journal record, not just the popular print journal record



Join Us!

How

- ❖ **Designate locations eligible for Archiving Proposal**
- ❖ Review archiving proposals and make commitment selections
 - If a first-time Holder, sign Archive Holder Amendment to Member Agreement

What

- ❖ Update records with commitment information
- ❖ Disclose commitments to WEST and other outlets
- ❖ Hold materials for WEST through 2035
- ❖ Provide access to WEST and Rosemont members

Holdings Location Review

AGUA dashboard:

Functions

Upload Bibliographic and Holdings Data

- Upload Your File
- Set Storage Location and Exclusion Flags

Holdings review page:

Institution: Arizona State University Status: IN_PROGRESS

Holdings Location Code	OCLC SP Symbol	Storage Location	Overlap Analysis Exclusion	Holder Proposal Exclusion	Builder Proposal Exclusion
		Select All		Select All	Select All
law-azref	AZC	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
law-core	AZC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
law-elh	AZC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
law-hirsch	AZC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
law-indian	AZC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
law-media	AZC	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



In Summation...

**Archive for
WEST!**

- ❖ **What:** Prioritizing scarce and uniquely held materials
 - Analyzing relative scarcity in WEST, Rosemont, and OCLC
- ❖ **Who:** All WEST members are invited to participate as Archive Holders
- ❖ **How:**
 - **Now:** Location selection in AGUA
 - **Later:** Accept archiving proposals & sign Archive Holder Amendment



Questions?



Information and Communication

- ❖ Resources for Archivers: <https://cdlib.org/west/west-archives/resources-for-archivers/>
- ❖ WEST feedback form: <https://cdlib.org/west/contact-west/>
- ❖ WEST Blog:
<https://cdlib.org/cdlibinfo/category/collections/west/>
- ❖ WEST listservs:
 - WEST-Archivers-L
 - WESTInfo-L (*WEST newsletter*)
- ❖ WEST project team: west-staff-l@listserv.ucop.edu

For list descriptions and instructions on joining: <https://cdlib.org/west/mailling-lists/>



Upcoming shared print events

- ❖ Print Archive Network (PAN) Forum
 - Friday Jan 21, 9-11am PT / 11am-1pm CT
- ❖ CCH post-summit webinar
 - Monday Jan 24, 8-9am PT / 10-11am CT
- ❖ Post-PAN watercooler
 - Monday Jan 24, 12-1pm PT / 2-3pm CT
- ❖ Joint Rosemont & Partnership meeting
 - Tuesday Feb 8, 9am-12pm PT / 11am-2pm CT

Thank you!

Please stay in touch with your questions and feedback.

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