



Western Regional Storage Trust

WEST 2019 Strategic Directions - Updates

December 2021

2019 Strategic Recommendations - Status Update

Strategic recommendations recorded in and copied from the [Outcomes and Recommendations](#) document shared with members in January 2020.

<i>Category</i>	<i>Recommendation</i>	<i>Status</i>	<i>Notes</i>
Program Communication	Recommendation 1: Develop WEST vision statement, mission, and guiding principles.	Complete	The WEST vision, mission, and guiding principles were endorsed by members in December 2021 and are publicly posted on the WEST homepage: https://cdlib.org/west/ .
Program Communication	Recommendation 2: Assess and update WEST’s website, curation of documentation, and communication strategies.	Complete with amendment	The Project Team reviewed the WEST website content and updated it for currency, accuracy, and improved navigation. WEST meeting notes were migrated from Confluence Wiki to a Google Shared Drive to facilitate collaboration across the membership. An additional recommendation to “Pursue migration from the current California Digital Library-structured site to a more standalone WEST-branded site” has been strategically deprioritized due to administrative and system support considerations.
Archiving and Collection Model	Recommendation 3: In the near term (Cycles 10/11, extending through spring 2022), allow Bronze archiving to slow.	Complete with amendment	In 2021, WEST gained access to the HathiTrust Digital Library (HTDL) serial and journal data. WEST’s leadership approved a recommendation to incorporate the HTDL data into the WEST collection model, expanding the scope of Bronze and creating new opportunities for low-effort archiving.
Archiving and Collection Model	Recommendation 3a: Prioritize development/analysis to surface Silver and Gold titles that are invisible because they are not held by any of the six Builders.	Complete	The AGUA Technical Team implemented a system enhancement project to produce a report showing these overlooked high risk titles across the WEST membership. An analysis of the data identified over 5,000 titles that have been previously overlooked. Based on these findings, the WEST governance groups endorsed a recommendation to pursue prioritization of scarce and unique materials in Cycle 12 collection analysis and archiving.
Archiving and Collection Model	Recommendation 3b: Seek out, assess, and tag as appropriate, Bronze titles that have been ‘elevated by stealth’ - that is, Bronze that has received validation at the level of Silver or Gold.	In progress	In November 2021, the WEST Operations and Collections Council (OCC) began review of a pilot project to routinize the identification and flagging of Bronze that has received validation at the level of Silver or Gold.
Archiving and Collection Model	Recommendation 3c: Explore comparing WEST Bronze titles against holdings in other shared print programs to determine overlap and uniqueness, with consideration that unique titles may need additional validation work, even if they are Bronze.	Forthcoming	This project is still forthcoming. The PAPR Collection Comparison tool (based on AGUA’s collection comparison tool, developed by the CCH Collaboration) opens interesting opportunities for achieving this kind of analysis at scale.

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Archiving and Collection Model	Recommendation 4: Recruit 2-4 additional members to participate in Cycles 10 & 11 analysis as Archive Builders.	Complete	Of the four Archive Holders that participated in the Cycles 10 & 11 collections analysis as Archive Builders, two had significant unique holdings of high-risk titles. The University of Denver and University of Missouri are now participating as Archive Builders and are currently archiving Silver and Gold titles.
Archiving and Collection Model	Recommendation 5: Convene a working group to 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.	Group convened, work in progress*	The Non-journal Formats (NjF) Working Group was convened in 2020 and has a selection of pilot proposals for expanding WEST's scope. The NjF Working Group will be engaging WEST members to gather input on the value and priority of the pilot proposals.
Program Business Model and Financial Stability	Recommendation 6: Maintain WEST's baseline annual budget of approximately \$800,000 to continue to support existing program activities and scope. Any new projects or improvements are supported through buffer funds or reallocation of existing funds.	Complete with amendment	In 2020, WEST re-evaluated its budget and reduced both the budget and member fees by 15% to proactively respond to anticipated impacts from COVID 19. WEST's existing services continue despite that reduction.
Program Business Model and Financial Stability	Recommendation 7: Pursue the development of a program budgetary reserve.	Complete	WEST program staff and the Executive Finance Subcommittee worked with CDL and UCOP staff to formally establish WEST's program reserves.
Program Business Model and Financial Stability	Recommendation 8: Reassess and reissue WEST's cost-share model based on inputs gathered from the 2019 assessment and internal analysis.	On hold	WEST pivoted from the pursuit of this recommendation to reducing member fees across the board by 15% to proactively address the anticipated financial impacts of COVID 19.
Policies and Practices	Recommendation 9: Convene a dedicated working group to review and revise, as necessary, the WEST borrowing and lending documentation and lending statistics reporting practices.	Group convened, work in progress*	The Resource Sharing (RS) Working Group convened in 2020 and worked in partnership with the Disclosure and Validation (DVS) Working Group to issue a recommendation for migration from the second symbol. The RS Working Group also investigated new resource sharing tools to support WEST lending and borrowing. The Group is currently finalizing revisions to the WEST Access Policy and updating the lending and borrowing instructions to reflect current technology.
Policies and Practices	Recommendation 10: Convene a dedicated working group to review and revise as necessary the WEST Disclosure Policy and Validation Standards.	Group convened, work in progress*	The Disclosure and Validation Standards (DVS) Working Group convened in 2020. The updated WEST Disclosure Policy was endorsed by WEST governance in spring 2021, and the DVS Working Group is currently reviewing and revising the WEST Validation Standards.

* The ongoing work of three working groups (Disclosure and Validation Standards, Non-journal Formats, and Resource Sharing) is expected to conclude in 2022.