

Non-journal Formats Working Group

Final Report and Recommendations

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Quick Reference Table

Recommended Priority Order and Title (“Brief Title”)	Brief Description	Priority Order Rationale	Considerations
Priority 1: Coordinate the Donation of Duplicate Copies to Internet Archive (“Internet Archive”)	Identify and route additional copies of WEST archived titles to Internet Archive for digitization and aspirational deposit in HathiTrust	<ul style="list-style-type: none"> - Supports expanded access - Relatively high member interest - Realistic in the near-term for members (“low hanging fruit”) - Realistic in the near-term for the WEST program - “Quick win” 	<ul style="list-style-type: none"> - Nuanced limitations to current workflows for depositing Internet Archive-donated content to HathiTrust
Priority 2: Prospective University Press and Regional Press Collections (Monographs) (“Prospective Presses”)	Cultivate a culture of retention upon acquisition through a tightly scoped, locally relevant prospective retention of presses	<ul style="list-style-type: none"> - Breaks new ground/requires a longer runway and socialization - Opportunity to lead where it’s needed - Some demonstrated interest among current and prospective members - Realistic in the near-term for the WEST program 	<ul style="list-style-type: none"> - Some demonstrated uncertainty among members about the value of pursuing prospective shared print
Priority 3: Environmental Scan and Holdings Assessment for International Government Publications (“International Government Publications”)	Work with experts in the field to forge a path for collaborative preservation of print international government publications	<ul style="list-style-type: none"> - Breaks new ground/requires a longer runway and socialization - Environment scan is realistic in the near-term for WEST program 	<ul style="list-style-type: none"> - Holdings assessment is likely to be challenging for near-term WEST and member capacity - Indication of member interest, but challenging to fully understand given the specificity of the immediate project and challenge of relating to future projects
Priority 3: Digitization of High-risk Titles (“Digitization”)	Work with WEST Builders to test local digitization capacity, focusing on print-only titles; preservation first, with access in the future	<ul style="list-style-type: none"> - Relatively high member interest - Breaks new ground/requires a longer runway and socialization 	<ul style="list-style-type: none"> - Likely not realistic in the near-term for members - Less realistic in the near-term than other pilots for the WEST Program - Considerable doubt from members about capacity to support the work
Priority 3: Print-only Journals for Prospective Retention (“Prospective Journals”)	Work with WEST Builders to ensure that active publications that remain print-only have retention commitments and are as complete as possible through the present	<ul style="list-style-type: none"> - Breaks new ground/requires a longer runway and socialization 	<ul style="list-style-type: none"> - Potential value in deploying this pilot in conjunction with digitization - Demonstrated uncertainty among members about the value of pursuing prospective shared print

Recommendations and Executive Summary

Recommendations

1. Move through a priority order of the pilot projects one at a time. Revisit and reaffirm or revise the priority order after the first priority pilot project is established.
2. Pursue the pilot projects in the following priority order -
 - a. First priority: [Coordinate the Donation of Duplicate Copies to Internet Archive](#) (Internet Archive)
 - b. Initial second priority: [Prospective University Press and Regional Press Collections \(Monographs\)](#) (Prospective Presses)
 - c. Initial third priorities: [Environmental Scan and Holdings Assessment for International Government Publications](#) (International Government Documents); [Digitization of High-risk Titles](#) (Digitization Pilot); [Print-only Journals for Prospective Retention](#) (Prospective Journals)

Executive Summary

Engagement with the Operations and Collections Council, the Executive Committee, and WEST members affirmed that each pilot proposal has merit, but that prioritization is essential to manage program and member capacity for new services.

Implement one at a time

The WEST Project Team recommends following an [Agile approach](#)—leveraged by WEST in its development work—for the implementation of the pilot projects. In this approach, potential projects are put in a priority order and carried out one at a time. This approach prevents potential capacity conflicts that can arise when undertaking multiple new projects and controls for the uncertainty of workload that characterizes new and innovative projects. While it is possible that WEST could pursue multiple pilot projects simultaneously, prioritizing one at a time will ensure the quality of the effort and manage the flow of communication, workflow development, and “asks” of WEST member libraries. Priority order can be reassessed and realigned at different points during the process to account for new information and emerging program and member needs.

First priority

There is strategic value in kicking off the sequence of implementing pilot proposals with one that is assessed to be a “quick win.” The rationale for this is that such a project builds confidence and enthusiasm for participating in future pilots that may be more challenging to establish. Conversely, if an implemented pilot project is assessed not to be viable for expansion, the original investment is low and it is likely easy to disengage.

The clearest quick win among the selection of the five pilot proposals is the Internet Archive pilot proposal. The reasons for this are explained more completely in the discussion and member engagement synthesis sections of this report. In summary, both members and the WEST Project Team perceive the Internet Archive pilot proposal as valuable and a reasonable amount of effort, or as “low-hanging fruit”.

Second and third priorities

Once the first priority project has been established, WEST should reassess the remaining four pilot proposals to affirm a strategic priority order. Reassessment can be simple or more involved depending on the needs of the program and members at the time. The following are initial recommendations for priority order that can be taken into consideration at the point of reassessment.

The second priority should be a pilot that is likely to take a little more time and socialization, but which breaks new ground for WEST and the broader shared print community. Any of the remaining four pilot proposals could be argued to fit that characterization. However, balancing perceived effort and interest, the Prospective Presses pilot proposal stands out as a strategic second priority. While member interest is not as clear on the point of prospective shared print, the ambivalence of the community indicates that there would be value in WEST testing a prospective project. Further, the Prospective Presses pilot can be implemented in a low-effort manner that does not require development work.

The International Government Publications, Digitization, and Prospective Journals pilot proposals are recommended, initially, as third priority projects. This is not based on their lack of importance. All three received expressions of interest during member engagement and continue to be considered by the Non-journal Formats Working Group as having exciting potential for WEST.

However, in-house digitization—the foundation of the Digitization pilot proposal—is unlikely to be realistic in the near-term for those members with whom the work would be concentrated and the Prospective Journals pilot proposal would benefit from consideration alongside the Digitization pilot. The International Government Publications pilot proposal’s environmental scan is realistic in the near-term, but holdings assessment will be a challenge to implement in the near-term.

Potential mechanism for reassessing priority order

In order to remain responsive to changing environments and new opportunities, WEST should reassess the priority order of pilot project implementation after the first project is established. The Operations and Collections Council (OCC) oversees key operational aspects of the WEST program and could be a natural home for this reassessment. At the same time, the OCC is a large group (9-11 members) with a heavy yearly agenda of oversight responsibilities. To account for this and to create an optimal environment for strategic reassessment, an ad hoc, 4-6 member Task Force of OCC representatives and external member representatives could be charged periodically (approximately at the close of establishing each pilot project) by the Executive Committee to assess environmental changes that might impact the priority order of pilot project implementation and to submit an affirmed or revised priority order.

Discussion

Four key questions informed and organized the analysis of how to prioritize the pilot projects. The answers to these questions support the strategic sequencing put forth in the recommendations and executive summary.

Prioritization Questions. What priority order:

1. aligns most closely with areas of emphasis in WEST’s vision, mission, and guiding principles?
2. is most aligned with current and prospective members' expressed needs?
3. is most realistic in the near term given key partner resources (i.e. members or organizations)?
4. is most realistic in the near term given WEST’s internal program resources?

1. Which priority order aligns most closely with areas of emphasis in WEST's vision, mission, and guiding principles?

All five pilot proposals demonstrate alignment with [WEST's vision, mission, and guiding principles](#). Each pilot moves WEST forward in expanded preservation, access, and informed decision-making. The pilots are each strongly aligned with WEST's guiding principles and demonstrate a commitment to collaboration with other, like-minded organizations.

While it is difficult to assess any one pilot as more aligned with WEST's foundational concepts than another, recent WEST conversations have emphasized *expanding access and providing immediate services for libraries*. The proposals that are most likely to be perceived by members as aligning with those emphases are the Internet Archive and Digitization pilot proposals.

2. Which priority order is most aligned with current and prospective members' expressed needs?

Based on member engagement, a digitization project answers the most immediate needs of increasing access and assurance for informed decision-making by WEST members. There is also a need, perhaps concentrated among a particular type of WEST member libraries, for WEST to catalyze a cultural shift to enable prospective shared print projects.

The Non-journal Formats Working Group is aware that WEST is in the middle of outreach to prospective new members. Enhancing access through digitization is likely to be the most appealing service to prospective members because of the direct benefit to users. However, it is worth noting that one of the key consortia through which WEST is recruiting is particularly interested in moving the needle on prospective shared print and has expressed interest in the Prospective Presses pilot proposal.

Member engagement on the prospective shared print pilot proposals (Prospective Presses and Prospective Journals) surfaced ambivalence. As noted, some members want to see WEST forge a path for prospective shared print collaboration. On the other hand, members also question the value of pursuing more recent publications in print, especially in the realm of serials and journals. The Prospective Journals pilot proposal prioritizes WEST's highest-risk content: journals categorized as print only. Members expressed a desire to assess the lasting value of those journals and the reasons for their continued lack of digital presence. Members also questioned whether it would not be equally important to set those journals on a path of digitization. This feedback suggests that there is value in considering the deployment of the Prospective Journals pilot proposal in tandem with the Digitization pilot proposal, which also prioritizes print only content. In tandem deployment could enhance the appeal of the Prospective Journals proposal and provide an opportunity to further investigate the value of engaging in prospective retention of serials and journals where digitization workflows may be established instead.

3. Which priority order is most realistic in the near term given key partner resources (i.e. members or organizations)?

Member engagement around the pilots and general feedback from members demonstrate that WEST libraries, at least in the near term, will find it difficult to take on significant new projects. For example, local digitization of WEST archived titles—the foundation of the Digitization pilot proposal—might compete with existing digitization priorities. There is a general sense of scarcity in time and resources among WEST members, and therefore any project that involves less local, in-kind effort is more likely to be

appealing in the near term. The Internet Archive proposal was characterized by multiple respondents in the member engagement survey to be “low-hanging fruit” and was generally perceived as a strategic means of folding in digitization activities with less burden on local resources.

There are opportunities to collaborate with external partners on all of the pilot proposals, with the exception of the Prospective Journals pilot proposal. External partners with whom WEST has engaged on the pilot proposals (including Internet Archive, HathiTrust, Center for Research Libraries, international government publication experts, GWLA, etc.) are generally open and interested in collaboration.

For both the Internet Archive and Digitization proposals, there are outstanding questions about how to create effective pathways to ensure that content digitized by the Internet Archive is also deposited with the HathiTrust for preservation assurance. Currently, those workflows exist only for physical materials that continue to be owned and controlled by the library, not for physical materials donated to Internet Archive. There are also limitations, based on copyright status, on what within that scope of digitized content the Internet Archive makes available for deposit to HathiTrust. Both organizations appear open to continuing to explore and define those pathways, but their capacity and final willingness to implement new workflows to ensure deposit to HathiTrust is not assured.

4. Which priority order is most realistic in the near term given WEST's internal program resources?

All the pilot proposals are intentionally designed to be feasible based on WEST's existing resources. However, there are proposals that will require more internal resources than others. The WEST Project Team assesses that the Internet Archive pilot proposal is the most immediately supportable by existing WEST resources and tools. WEST has several existing reports and functionalities that can support more passive or involved coordination of donation to Internet Archive. The most intensive part of implementing the Internet Archive proposal is the effort to establish new expectations and workflows to ensure digitized copies are also deposited to and available through the HathiTrust.

The WEST Project Team also assesses that the Prospective Presses pilot could be established with moderate internal resources. A simple approach involves the coordination of proposals, commitments, and disclosures outside of the AGUA system through publicly posted lists and registration in OCLC. If the pilot is expanded, WEST could invest in AGUA systems development and more sophisticated approaches to coordinating proposal, commitment, and disclosure.

The Prospective Journals pilot proposal could also be established with relatively little resourcing from the WEST Program, by extending existing capabilities and modifying existing policies and guidelines. But, if combined with a digitization workflow as suggested earlier in this discussion, the Project Team's assessment differs.

The Digitization pilot proposal will take the most internal resources to implement. Framing a full digitization workflow will require development of new policies, standards, and guidelines. The Project Team, not having immediate expertise in digitization, will need to coordinate extensively with partners to establish the pilot. The potential WEST-administered temporary storage of digital copies will require administrative and financial resources. Financial resources to subsidize library participation will be redirected from the archive creation budget.

The facilitation of an environmental scan for the International Government Documents pilot is supportable in the near-term through WEST staffing resourcing and administrative resources. On the other hand, new AGUA development may be necessary to support the holdings assessment in-house, or WEST will need to establish a partnership with another organization like CRL, GoldRush, or OCLC to effectively support the second part of the pilot. In either scenario it will be a significant investment of internal resources.

Member Engagement Synthesis and Analysis

Instruments & Engagement Demographics

- Two Town Halls to present all five pilot proposals and hear member questions and comments (with recording) (31 attendees)
 - One Poll deployed during each Town Hall
- One Survey (9 respondents; all Town Hall attendees)
- One Focus Group (4 participants)

Non-journal Format member engagement opportunities drew a reasonable amount of input and participation from WEST members. The number of attendees to the Town Halls was comparable to previous WEST events inviting input on new strategic directions. Participation in the survey and focus groups strongly aligned with the individuals and institutions that chose to participate in a Town Hall. The Town Hall recording and survey did not elicit input from individuals or institutions unable to attend the live Town Halls.

Town Hall Outcomes

Town Hall engagement surfaced a tension between the value of proposals and the perceived burden on local resources (i.e. digitization). The Town Halls also revealed a tension between the perceived value of WEST leading in challenging or unexplored areas of collaboration and uncertainty over the ultimate value of those areas (i.e. prospective shared print and international government documents). A poll administered at both Town Halls resulted in comparable interest across areas of potential impact, with slightly less interest in expanding the culture of collaboration to extend to retention upon acquisition (i.e. prospective shared print).

Digitization elicited the most interest and direct feedback during the Town Halls, but sentiment on pursuing digitization is complex. It is considered to be both high-value and high-effort. There was considerable hesitation over perceived operational challenges, most significantly connected with local capacity and resources. At the same time, attendees noted the value of increased access and assurance to support space reclamation and the opportunity of building digitization workflows and establishing quality measures through WEST with trusted partners such as Internet Archive, HathiTrust, JSTOR, CLOCKSS, and/or the Center for Research Libraries (CRL).

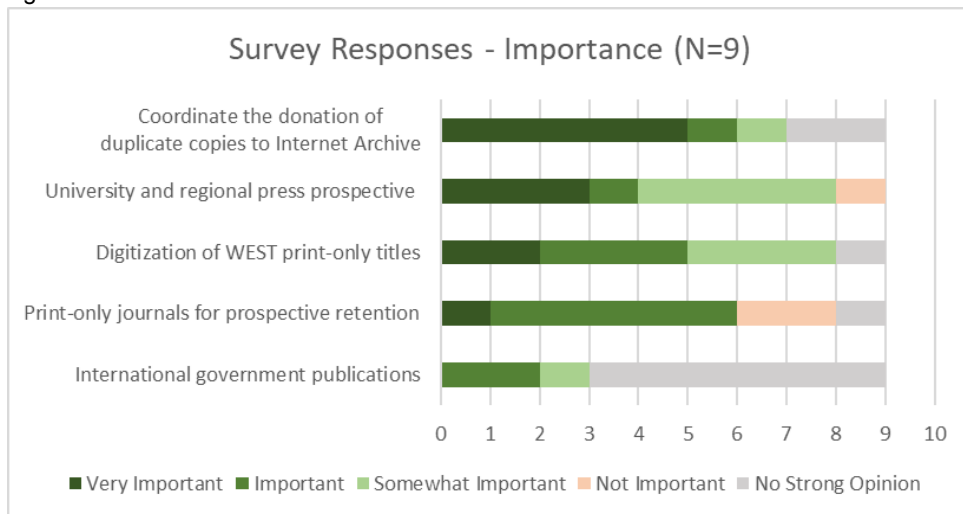
For prospective shared print overall, feedback indicated that there would be value in WEST helping member libraries define collaborative models and communication resources for engaging in prospective shared print, as libraries continue to struggle to define those models and the value proposition. Demonstrating that struggle in real time, some attendees reflected that the paradigm shift from retrospective to prospective shared collections is not a natural or foregone conclusion and there is a sense that prospective projects (especially for serials and journals) might naturally taper off as print continues to decline.

Town Hall attendees expressed interest in WEST taking a leading role in projects that map the path forward for new areas of print content, like international government publications. There was considerable interest in what organizations (like HathiTrust and CRL) WEST would partner with on such a project. However, the specificity of the content in question may have limited the amount of direct feedback.

Survey Outcomes

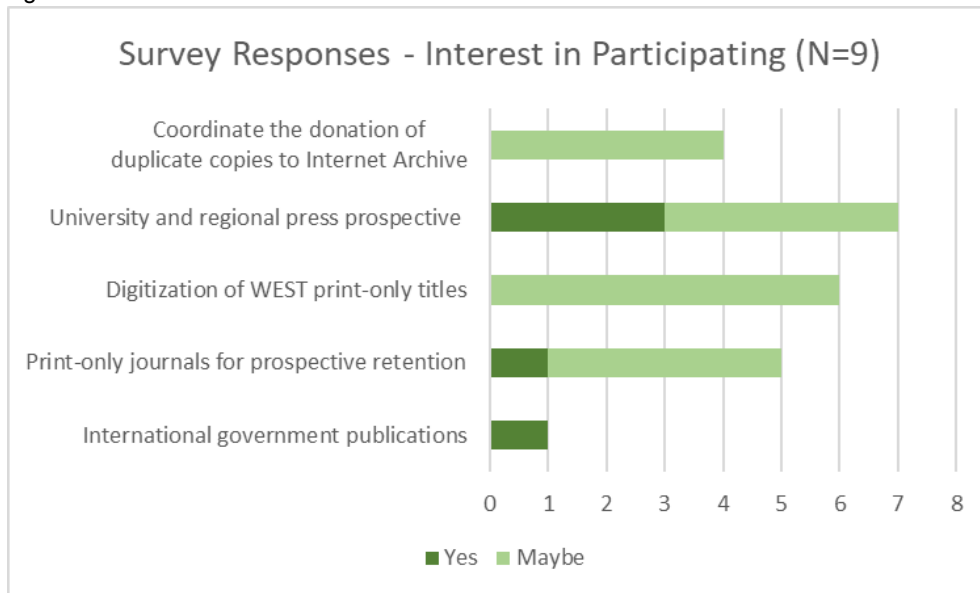
Both the Prospective Retention of Print-Only Journals and the Coordination of Duplicate Copies to Internet Archive pilot proposals received strong overall support with 67% of respondents rating those proposals as Important or Very Important. However, the Prospective Retention of Print-Only Journals also manifested the most responses of “Not Important” (22%). The University and Regional Presses pilot proposal elicited a fairly even split of responses between “Somewhat Important” and “Very Important.” Respondents ranged across the board in assessing the Digitization of High Risk Titles pilot proposal’s importance and overall showed 56% of respondents rating as Important or Very Important. Respondents appeared to feel least able to comment on the International Government Publications pilot proposal with 67% responding that they “Do not have a strong opinion.”

Figure 1.



Among respondents, there is potential interest in engaging in a WEST pilot, even when respondents did not consistently rate the project as Very Important. Interest was expressed as follows:

Figure 2.



The survey offered respondents an opportunity to comment in free text fields on the importance, or lack thereof, of the pilot proposals. Respondents provided rich answers that generally reinforced Town Hall themes and outcomes. By pilot proposal, comments are summarized accordingly:

- Donation of Duplicate Copies of WEST Titles to Internet Archive - high resonance based on access benefits and perception that this would be “low-hanging fruit.”
- Digitization of High Risk WEST Titles (local digitization) - digitization for access is important, but there is concern about reinventing or creating redundant digitization workflows.
- Prospective Retention of High Risk WEST Titles - opportunity to build on what libraries are already doing, but concern about the priority or lasting value of the content and the parallel need to support or direct content for digitization.
- Prospective Retention of University and Regional Presses - desired content, builds on what libraries are already doing, and supports a cultural shift.
- International Government Publications - Majority of respondents did not have a strong opinion or, perhaps, did not feel informed enough to respond. The one respondent representing a smaller, more specialty library indicated this pilot proposal would fill an important gap.

Focus Group Outcomes

The focus group was scoped to primarily discuss the Prospective Retention of University and Regional Presses, with some general feedback on the other pilot proposals. Focus group participants were from larger and/or state institutions.

The focus group was in consensus that the most important criteria of success for the pilot is its ability to serve as a proof of concept from which future projects can emerge. Success in this pilot could be reflected in answers to questions such as: “Have we demonstrated that collaboration is possible at this level?” and “Have we developed a model and some workflows that can pave the way for expanding collaborative collection development?” Other success criteria included the ability to analyze what is retained.

Focus group attendees reported some active collecting of University Presses, but most also commented that they prioritize comprehensive collecting by subject area, rather than by press.

Focus group attendees identified a number of challenges to be addressed in rolling out a pilot like this, including:

- The branching nature of some University Presses with multiple imprints - WEST will need to set clear guidelines for what is in scope
- Managing concern over ability to commit due to constricting budgets - WEST will need to consider early scoping to support libraries' success in pitching the work to administrators
 - One idea raised would be to frame the scope in terms of a dollar commitment or commitment to a percentage of the content

Focus group attendees also raised ideas for how to creatively support the success of the pilot proposal, including:

- Partner with presses to alleviate some of the burden on the libraries (i.e. the library agrees to the ongoing purchase of half the content and the press contributes the rest)
- Support participation by willing members without an institutional press of their own (could those libraries partner on the retention of presses with large outputs)
- Provide communication resources to help build pride and goodwill in how the library supports the university press (also needs to be built on a foundation of communication around "why print")

When asked which of the pilot proposals resonated, several focus group members identified the pilot proposal for prospective retention of print only titles. Those focus group members noted that it would be an extension of their existing activity within existing infrastructure provided by WEST, which makes the idea feasible and appealing. Focus group attendees expressed general interest in all the proposals, particularly digitization, but that interest is balanced by the consideration that their institutions have little capacity to spare for new projects. The argument for the priority of the work would have to be very compelling - e.g. digitizing print-only titles that are also assessed to be scarce.

When asked what expansion of services would be most impactful for their libraries and users, focus group participants reflected that growth of services in WEST helps them to continue to make the argument for investing in the collaboration and that with shrinking staff and resources locally, any support they can get from collaborative services is important.

Refined Pilot Proposals

Digitization - An Introduction to Two Proposals

The following two digitization pilot proposals are not mutually exclusive, though they introduce digitization into WEST's scope in very different ways. The first pilot proposal is based on building digitization capacity within the WEST program and among its members, which will give the collaboration more control over the process, but that comes with an associated cost. The second pilot proposal will build a very different kind of capacity in WEST: a facilitative capacity to collectively maximize deselections across the collaboration by routing deselected titles for digitization by the Internet Archive. This latter approach will be lower cost, but WEST's control of the digitization process will be limited.

Digitization of High Risk Titles

Brief Description

Archived titles available as “print-only” are at high risk of loss and should be prioritized for preservation in a digital format with the longer-term goal of providing digital access and discovery to WEST members. To address this need, WEST proposes a digitization pilot for Gold titles with WEST partner libraries.

At a Glance

- The pilot will prioritize digital preservation, with discovery and access mechanisms to follow.
- Archive Builders will be optimal partners for an internal pilot for digitization given their existing retention of print-only titles, but participation will be entirely voluntary.
- The pilot will aim to harmonize pilot parameters with local Builder digitization infrastructure, workflows, and existing projects (i.e. building on existing infrastructure; avoid conflict with existing projects).
- Engaging in a pilot project will allow WEST and its members to assess the ongoing viability and value of the work before expansion.
- If the pilot proves successful, WEST will partner with external organizations possessing the expertise and infrastructure needed to support expanded digitization, hosting, and access to content.

Background

Shared print programs are natural partners in the field of digitization. WEST in particular, as it actively identifies titles believed to be “print-only” and therefore at higher risk of loss, is well-positioned to develop workflows by which dual print and digital preservation is achieved. WEST has the opportunity to leverage its collective power and existing collaborative infrastructure to form a pipeline for digitization.

The resources required to support preservation digitization include capacity to digitize, host, and supply metadata. WEST will partner with member libraries to provide these services as proof of concept for a preservation collection. The preservation model allows WEST to proceed while developing a copyright model, and while considering options for providing open access at a later time. If WEST then decides to expand the project and to provide access and discovery for digitized content, it may decide to explore a partnership with a non-profit organization with expertise in hosting for access. Potential partners include JSTOR, HathiTrust, or Internet Archive.

Digitization has the potential of high impact for WEST members across the board from more assured preservation, to expanded access, to strengthening the rationale for responsible deduplication (space reclamation), to providing innovative leadership in the community, where no shared print program has yet to launch a parallel digitization effort. These impacts and long-term positive benefits for member libraries could outweigh the costs to accomplish this project. In order to succeed, the pilot program will need to address questions of identifying and prioritizing titles, funding, storage, and standards.

Expanding WEST preservation efforts to include digitization is a major undertaking. WEST's internal readiness is low, but there is some capacity within WEST member institutions. Initial outreach to Archive Builders to determine local capacity for digitization is an important step for the pilot project. If the pilot is deemed a success, WEST should be able to secure competent partners (i.e., HathiTrust, JSTOR, etc.) to contribute expertise in areas that WEST lacks.

Collections Model

The focus will be on print content already included in WEST that is not yet available in a digital format. For both the internal pilot project and any potential partnerships, WEST will consider the following priorities:

- Gold journals are the highest priority as WEST has confirmed they are not in JSTOR, Portico, or CLOCKSS.
- A collection review is needed to determine how many Gold titles have been included in a digital archive since last reviewed.
- Consultation with existing digital archives will be important. Before beginning digitization, WEST should ascertain what journals JSTOR, Portico, et al plan to add to their archives in the near term. WEST should prioritize journals that are not already on the current roadmap for digital archiving by another trusted organization.

Operations Model

Potential partners:

- WEST Archive Builders
- JSTOR
- HathiTrust
- Internet Archive

Implementation steps:

1. An internal pilot program will provide proof of concept. Digitization is for preservation at this point. Discovery and access are not mandatory components of the pilot program. WEST will:
 - a. Seek willing WEST partner library/libraries with digitization capabilities to digitize a sample set.
 - i. Alternatively, WEST will contract with, or support the library partner's contract with, an external vendor to perform a tightly-scoped set of digitization tasks. In this case, WEST partner libraries will still play a necessary role in metadata management, workflow management, and possibly data storage.
 - b. Determine who is digitizing or preparing to digitize similar or overlapping collections (Portico, CLOCKSS, JSTOR, Rosemont, other shared print consortia).
 - c. Identify minimum specifications for metadata and digitization for quality control and integration into other possible collections.¹
 - d. Identify temporary digital storage locations and funding.²
2. Once the pilot is complete, WEST will solicit feedback from member libraries on the workflow and the sample set. This could include surveys for digitization partners related to costs associated with the project, and surveys to other WEST members related to the value of the project. Success will be measured by membership interest in and support for the project and readiness to continue digitization.
3. If the pilot is deemed successful, WEST will determine next steps:

¹ There are existing specifications and standards that WEST can draw upon to define its own requirements. Examples include: the [Federal Agencies Digital Guidelines Initiative \(FADGI\)](#), the HathiTrust [Digital Object Specifications](#) and [Technical Requirements for Digitized Page Images Submitted to HathiTrust](#), as well as the Library of Congress [Preservation Guidelines for Digitizing Library Materials](#) and [Technical Standards](#).

² This might involve WEST expanding its existing Amazon Web Services storage that supports other WEST data projects, or it might be possible to identify local storage at participating institutions.

- a. Either continue ongoing preservation digitization internally or offer access via a long-term partner for hosting and discovery.
 - i. Potential external partners - JSTOR, HathiTrust, Internet Archive.
- b. Determine preferred access/lending model (e.g. open access, controlled digital lending, issue level or article level access).
- c. Develop a clear strategy for obtaining copyright clearance or user authentication where needed.
- d. Determine any publisher incentives for particular titles or collections.
- e. Determine the scope of titles for long-term digitization efforts.
- f. Obtain estimates from prospective partners for cost of scanning, hosting, describing, and preserving WEST resources.
- g. Work with archive builders to provide content for scanning.

Business Model

WEST's goal, during the pilot stage, will be to develop a baseline for costs associated with digitizing, assigning metadata, and hosting. WEST will:

- Support the pilot, or proof concept stage via redirecting a designated portion of existing archive creation funds to subsidize Builder expenses related to digitization (or, if advised, contract with a vendor to perform some of the necessary tasks). Further conversation with Builders and the WEST Executive Committee will be required to adjust the archive creation subsidy to account for new digitization expenses. Funding the pilot by redirecting existing funds, rather than trying to raise the money through an increase in fees or grant proposals, provides a straightforward way to begin the work and assess value. Pilot outcomes could then be leveraged in making the argument for new funding.
- Develop cost estimates for expenses incurred by the WEST library partner(s) during the proof of concept stage. This could include incentives for participation, perhaps via an ongoing redirection of archive creation funds. A similar per volume calculation could be used to offset local digitization costs. There may also be an opportunity to compare cost between local resourcing and vendor service for some digitization tasks.³
- Following the pilot, in conjunction with potential partners, develop a full resource estimate for costs to perform the service for the projected number of backfiles each year and to digitally preserve and host access. Resources may include staff, tools, licenses, materials and shipping services and may be provisioned by potential digitization partner(s), WEST Administrative Host and WEST Archive Builders.
- Develop cost recovery methods, which could include cost based or value based pricing; funds from WEST member libraries, other non-WEST member libraries, and/or publishers (e.g., cost-shared digitization).
- Communicate with WEST membership and with the larger academic library community about the net value (perceived benefits minus perceived costs) of this collection.

³ This will depend on the local capacity of the library partners and the volume of the pilot. There may be an opportunity to leverage existing agreements between WEST libraries and external vendors. If that opportunity arises it would be valuable to divide the work and compare outcomes. Otherwise, a comparison like this may be most realistic after the pilot.

Consultations with Potential Collaborative Partners

Members of the Non-journal Formats Working Group met with potential collaborative partners to hear feedback on core concepts of this pilot proposal and gauge interest and capacity in participation.

Consultation with a California Digital Library mass digitization expert surfaced the consideration that projects and pilots conducted within the University of California have demonstrated real trade-offs between asking local staff to perform all steps of the digitization process versus contracting with a vendor that can conduct focused, scaled work on-site. The cost for local library staff to carry out the work might well be higher than the cost of hiring a vendor to work with the material on site.

Meetings with two different Archive Builders indicate that there is interest and some capacity to engage in targeted digitization of WEST Archives. Brief takeaways from Builder discussions:

- Builders leverage a combination of in-house capacity (primarily for small projects) and external vendor capacity.
- A resourcing or subsidy model, like the archive creation subsidy, would help with participation and feasibility.
- The preservation priority is compelling and would be even more so if a step in the implementation included depositing new digital assets with HathiTrust as a trusted digital repository.

NjF has not met yet with SRLF/UCLA, but there is helpful information on [SRLF's website](#) that indicates SRLF does have some digitization capacity, which is available to organizations beyond the UC, and that they follow FADGI guidelines.

Discussion with Internet Archive leaders affirmed the organization's interest in collaborating with WEST. The Internet Archive is in the midst of expanding and refining its digitization work with serials and journals. The Internet Archive could work as an on-site partner with WEST Builders. Internet Archive's role would be to set up a satellite digitization center with the host library to complete digitization work on-site. There would be a cost for WEST and/or the host library.

Meetings with the Internet Archive and the HathiTrust surfaced limitations to depositing Internet Archive-digitized files with the HathiTrust. Those workflows are currently limited to content that remains in the control of the library (not donations) and is not in-copyright. The crux of the issue for HathiTrust is their model that the library maintains responsibility for the metadata and record. There are also limitations, based on copyright status, on what within that scope of digitized content the Internet Archive makes available for deposit to HathiTrust. Both organizations are willing to discuss these limitations further.

Coordinate the Donation of Duplicate Copies to Internet Archive

Brief Description

WEST identifies and coordinates the donation of duplicate print materials to Internet Archive for digitization and aspirational deposit in HathiTrust to complement the WEST archived collections.

At a Glance

- WEST will leverage its technology and member data to surface print copies that duplicate the retained WEST holdings.
- WEST will facilitate the optional donation of duplicate copies to the Internet Archive for long term physical storage and digitization.
- WEST will coordinate the deposit of newly created digital copies with HathiTrust.

Background

The Internet Archive has shown an interest in digitizing materials that are donated by libraries (e.g., books, microforms, scores, etc.) and making them available publicly through controlled digital lending and/or Interlibrary Loan. They already receive deaccessioned monographs from a number of libraries, paying to have them shipped to their digitization center in the Philippines. In return for these donations, Internet Archive has agreed to provide donor libraries with a digital copy of the works they digitize, and there have been some preliminary discussions on setting up automated deposit of the digital files in HathiTrust.

Were WEST to leverage their significant data on member holdings to coordinate voluntary deaccessioning and donation of a full run of the physical Gold, Silver, and Bronze serial titles held across WEST libraries, that full corpus of content could be digitized at limited cost to the membership and WEST would receive digital surrogates that could be deposited in HathiTrust, ensuring they are digitally preserved and providing access for the print-disabled and possibly as well as for text and data mining. The Internet Archive would also make these materials available publicly through controlled digital lending and/or ILL (as a Rapid member).

To be clear, donated materials would be surplus copies of materials retained by WEST Archive Holders and Builders. The archived copies retained by Archive Holders and Builders would not be donated. WEST would facilitate the donation of additional copies found across the membership.

Collections Model

The focus will be on print content already retained in WEST that is not yet available in a digital format. In order of priority, targeting titles at a *to be defined* level of completeness:

- Gold journals will be the highest priority as WEST has confirmed they are not in JSTOR, Portico, or CLOCKSS.
- Silver journals, where partial full text is available commercially, will also be a high priority to offer alternative access points.
- Bronze journals, which are available in JSTOR, Portico, CLOCKSS, or HathiTrust may be a priority despite their presence in trusted digital repositories for the sake of providing more immediate access options for members.

Operations Model

Potential partners:

- Internet Archive
- HathiTrust

Implementation steps:

1. The WEST Project Team and OCC will create a framework for prioritizing candidates for digitization (e.g. risk level, completeness of holdings, rarity, geographic proximity to IA, membership in HathiTrust)
2. Technology support:
 - a. Option 1: WEST will leverage the Builder calls for holdings interface in AGUA to identify additional copies for prioritized WEST archived titles
 - b. Option 2: WEST will enhance the On Demand Collection Comparison report to return unarchived holdings data for WEST archived titles to identify additional copies of prioritized WEST archived titles
3. WEST will create a workflow and system to track and report on “commitments” to donate, shipping status, and the provision of the digital copy back to members
4. WEST will distribute proposals to members to donate prioritized title runs to Internet Archive*
5. WEST members will ship content to Internet Archive
6. Internet Archive will provide the digital file back to members
7. WEST will define a workflow for routing the digital file to HathiTrust
 - a. Currently, workflows for submitting Internet Archive-digitized content to HathiTrust are limited to content that remains in the control of the library (not donations) and is not in-copyright. WEST will need to work with both organizations to explore new principles and associated workflows.

*In tandem or alternatively, WEST can also create instructions to support members engaged in defined deselection projects to incorporate Internet Archive donations into their workflows based on WEST retentions.

Business Model

The resourcing for this service will be a combination of in-kind efforts among WEST, Internet Archive, HathiTrust, and member libraries.

- WEST will contribute its analytic and coordination capacity to oversee and manage the service
- Internet Archive will cover all costs of digitizing, storing the digital and print copies, and providing access to the digital copies
- If deposit is possible, HathiTrust will contribute storage and stewardship of digital copies as appropriate per their policies
- WEST member libraries will contribute staff time and some financial resources to review proposals for donation, to prepare donated materials, and to ship them

Consultations with Potential Collaborative Partners

Discussion with Internet Archive leaders affirmed the organization’s interest in collaborating with WEST. The Internet Archive is in the midst of expanding and refining its digitization work with serials and journals. For donations (where the material’s final landing place is with the Internet Archive), a cost share between the Internet Archive and donator is appreciated, but the Internet Archive will support packing and shipping if they have funding to do so. The Internet Archive also affirmed that they will accept duplicates. There are no publicly available comparison tools for Internet Archive content, although they do have some internal overlap analysis capabilities.

Meetings with the Internet Archive and the HathiTrust surfaced limitations to depositing Internet Archive-digitized files with the HathiTrust. Those workflows are currently limited to content that remains in the control of the library (not donations) and is not in-copyright. The crux of the issue for HathiTrust is their model that the library maintains responsibility for the metadata and record. There are also limitations, based on copyright status, on what within that scope of digitized content the Internet Archive makes available for deposit to HathiTrust. Both organizations are willing to discuss these limitations further.

International Government Publication Collections (Pilot Holdings Assessment and Environmental Scan)

Brief Description

Coordinated holdings assessment and environmental scan project, possibly to lead to plan for a Controlled Digital Lending digitization partnership and/or retention agreements and a set of best practices for scoping future government publication projects.

At a Glance

- International government publications are one category of collections where there is an on-going need for deep and broad holdings to support current and future research.
- No single institution can independently meet this need and there is currently no national coordinated effort to preserve these materials.
- This pilot will leverage the expertise of subject domain librarians to identify scoping criteria and content areas to conduct an environmental scan of historic print holdings for IGO, NGO, and non-US national governments.
- The initial output for this project will be an environmental scan and a tightly-focused holdings assessment.
- Goals for this project include identifying reasonable next steps for increasing discoverability and access for the publications within project scope and exploring a model to address similar clusters of primary resources in academic library holdings.

Background

Many research libraries have acquired, and continue to responsibly manage, the publication outputs of international governmental organizations (IGOs), non-governmental organizations (NGOs), and national governments outside the U.S. However, there is no national leadership in initiating/organizing collaborations for long-term access and preservation of these resources outside of discrete and often informal consortial relationships.⁴ Elevating these collections to WEST's purview offers government information librarians leverage to achieve more transparent and coordinated shared collections.

⁴ While this proposal breaks new ground in an underrepresented preservation area, there are a number of discrete projects that exist outside of current shared print structures and norms that can inform this work and, perhaps, be informed by this work. Concerning U.S.-originating content, the Working Group is mindful of contributions from and the opportunity to learn from the [United States Agricultural Information Network \(USAIN\) National Preservation Project](#) and the [Technical Report & Archive Image Library \(TRAIL\)](#). There are also historical collaborative efforts in the U.S. to collect foreign gazettes (see [CRL report](#)).

Historical IGO, NGO, and non-U.S. government publications are at varied levels of access and risk of loss. Only a few IGO publishers, such as the United Nations, support library access networks or operate digitization programs for historical publications; most do not. As with general collections, there are standard IGO titles collected across libraries in the United States; this project aims to identify the hidden titles that support the research aims of WEST libraries and are at greater risk of loss due to scarcity or other factors. By seeking to understand the discoverability and accessibility of a subset of these collections, with a focus on those that may be held uniquely within deep or broad collections, WEST will provide leadership toward filling existing gaps, thereby increasing the reach of these collections. This proposal aligns well with interest on the part of potential partners in preserving and improving access to at risk collections of international relevance.

This pilot proposal emphasizes the importance of gathering a panel of experts to identify a high-level initial scope of analysis. An environmental scan, leading to a narrowly-focused assessment of current OCLC holdings will help determine the potential for digital access models like controlled digital lending. Further, the scan will help assess the value of a registration system for stakeholders. The outcome may not necessarily lead to WEST registration of commitments, given that there could be active stakeholders participating in this effort outside of the WEST membership.

There is also the potential to identify significant gaps in recorded holdings that could be scaffolded into a future iteration of the project that would address rare or at-risk titles. Best practices emerging from the current proposal will lead to a framework that may eventually include publications from NGOs, quasi governmental organizations, and other national governments.

With the breadth of participation in WEST, we are well-positioned to take on a leadership role to create a strategic and expertise-driven action plan that will have an impact on a set of collections that are, at best, unevenly supported, likely at risk of loss, and clearly in need of coordinated assessment and investment. This is a low-resource, quick-start effort with the potential to produce a leadership “win” through enhancing access to resources that are already held in member collections.

Collections Model

Based on the advice of participating experts, the target content for a holdings assessment will be a scoped selection of official publications in print from selected IGOs. The content set (including time periods to focus on) will be refined based on criteria that reflect current OCLC holdings and potential risk of scarcity, with the potential of leveraging existing tools already in use among project partners, e.g., AGUA, GreenGlass, etc.

Operations Model

Potential partners:

- Center for Research Libraries
- HathiTrust
- OCLC / OCLC Research
- Rosemont Alliance & Partnership for Shared Book Collections
- Stakeholders from research libraries with significant holdings

Implementation steps:

1. Conduct a lightweight environmental scan of target collections, including current access conditions and likelihood of inclusion in existing retention programs.
2. Based on the findings of the environmental scan, conduct a holdings analysis for target collections.
 - a. Consider potential for limited adaptation to AGUA for serials analysis.
 - b. Investigate potential for HathiTrust support for holdings comparison.
 - c. Investigate methodologies employed in the UC FedDocArc project.
 - d. Consider benefits/drawbacks to contracting with OCLC for GreenGlass analysis.
3. Propose best practices for supporting long-term access to the target collections based on infrastructure already in place.
 - a. Assess need for and feasibility of setting up shared retention commitments, potentially with one or more partners.
4. Propose recommended next steps for improving broad access to collections.
 - a. Explore potential for a digitization plan in conjunction with a CoDiLe model or an access model similar to TRAIL.
5. Develop initial costs assessment for recommended next step(s).

Business Model

Estimated costs:

- Initially in-kind, working with identified partners first to assess the specific opportunities and potential workflows and costs.
- Costs for an environmental scan, if conducted under contract.
- Costs for a holdings analysis will depend on appropriate methods, tools, and scope.

Available resources:

- Recruit experts from WEST participating institutions and other research libraries to identify a focus that will allow for a quick start. These experts can develop a plan for an environmental scan and needs for a holdings assessment process.
- Partners may be willing to contribute to costs for an environmental scan. If a significant need for a registration service emerges, partners may be able to implement in-kind or with financial support.

Consultations with Potential Collaborative Partners

Members of the Non-journal Formats Working Group met with International Government (IG) publication experts and contacts from the Center for Research Libraries (CRL) to discuss this proposal. Conversations with IG experts affirmed that there are areas of need and interest, which helped to scope this proposal's focus to NGOs, IGOs and non-US national government publications. Discussion with CRL contacts gauged their interest in collaboration. CRL colleagues provided helpful insights into related projects and emphasized the important role WEST could play in bringing together the relevant experts. CRL colleagues affirmed that the proposal appears to be in scope for their organization and those present saw an opportunity to advocate within CRL for collaboration, should the proposal move forward.

Prospective Shared Print - An Introduction to Two Proposals

What are we trying to accomplish with a prospective shared print project?

- WEST will aim to foster a culture of committing to retain content at the time of acquisition, rather than exclusively retrospectively.
- Additionally, WEST will aim to begin outlining a framework to share the ongoing responsibility of collecting in certain areas.
- At least in its early stages, a WEST prospective shared print project will not be expected to result in significant space reallocation opportunities, nor will the work be meant to challenge publishers or significantly impact the publishing economy.

Two proposals have been developed in the area of prospective shared print - one for monographs and one for serials and journals.

University Press and Regional Press Collection Pilot (Monographs)

Brief Description

Coordinated, prospective acquisition and a commitment to the ongoing stewardship of University Press and regional press collections. This proposal is initially scoped as a pilot by recruiting a small number of willing institutions to test workflows.

At a Glance

- This project will leverage, amplify, and codify *existing priorities* for local collecting at a consortial level.
- This narrowly-focused prospective project will allow WEST members to foster a culture of and expectations around committing to and recording retentions at point of acquisition.

Background

Under this proposal, willing WEST members who are either Archive Holders or Archive Builders will comprehensively collect and retain the full monographic print output of their institution's University Presses (and/or select regional presses). Participating institutions will commit to acquiring and retaining this content through the existing WEST retention period (December 31, 2035). The content may be held in open or closed stacks, and participating members will commit to making it available through ILL to WEST members, if not more broadly. WEST will commit to tracking the titles acquired by participating members and submitting (or coordinating the submission of) print retention commitments to OCLC on behalf of WEST. While the intention is to have the library collect and retain content from only their own university presses, following the pilot, if any library from an institution with a university press declines to participate, another library may agree to collect and retain that content.

This proposal poses a fairly low bar for participation. These are materials that institutions are likely supportive of collecting more programmatically and comprehensively (if they are not already). This proposal focuses less on freeing up space (as these will be new publications not yet held in other libraries), than on intentionally and actively collecting and prospectively recording commitments to retain relevant scholarly content for the broader community. It is not the intent of this proposal to reduce what university libraries purchase in print from presses.

Ultimately, this pilot will support WEST members in clarifying what is core to their institution's print collecting priorities within a larger framework of other libraries doing the same and cultivates a culture of committing to retain relevant print content upon acquisition rather than retrospectively.

Collections Model

- Comprehensive of new monographic output of University Presses and regional presses from date of commitment.
 - Presses are associated with WEST institutions or are regional.
 - Exceptions to comprehensive collecting may occur in the form of omitting certain monographic series, but this would be considered less optimal.⁵
 - Consideration may be given to dividing responsibility for a particular press between several WEST members.
- Seed list of presses generated by WEST program staff, guided by OCC, with opportunity for members to nominate additional presses.
 - Members commit to a press and collecting parameters rather than a set of titles.

Operations Model

Potential Partners:

- WEST Archive Holders and Builders
- Greater Western Library Alliance (GWLA)

Implementation steps:

1. WEST Program will publish a list of proposed presses for retention.
2. Participating Archive Holders and Builders will commit to retain, on behalf of WEST, all output of a specific press.
3. Commitments will be recorded in an amendment to the original member agreement, which will be signed by the participating Archive Holder or Builder (*forthcoming - Amendment Template*).
 - a. Participants will agree to collect and retain all new monographic output through WEST's retention period.
4. Commitments (to presses) will be publicly recorded and displayed on the WEST website.
5. Participating Archive Holders and Builders will acquire the yearly monographic print output of their committed press, record retention notes in the records upon accession, and disclose those retentions in agreed upon systems annually (*forthcoming - Addendum to the WEST Disclosure Guidelines*).
6. Participating Archive Holders and Builders will make retained content available to WEST members under the WEST Access Policy.

Business Model

- Estimated costs for WEST members (financial or in-kind)
 - Financial commitment by participants to acquire press content on a yearly basis (anticipated that in many cases members will already be acquiring this content).
 - In-kind staff resources to record retention notes upon accession, disclose to agreed upon systems, and provide access to the content (anticipate a reduced workload from retrospective shared print processing by virtue of recording retention notes upon accession).
 - No required physical validation or storage environment.
- WEST program resourcing

⁵ Monographs are the initial focus of this proposal, but depending on the outputs of the presses in question, WEST could choose to broaden the format scope of this activity.

- Generation of press seed list for commitment.
- Generation of supporting documentation and policy addendums, as necessary.
- TBD in-house registry enhancement to accommodate monographs (development).

Consultations with Potential Collaborative Partners

Members of the Non-journal Formats Working Group met with contacts from the Greater Western Library Alliance (GWLA) to discuss this proposal and GWLA's interest in collaboration. GWLA is identified as a potential partner due to a similar proposal that emerged in the consortium, the strong representation of GWLA members in WEST, and the overlap in leadership between the GWLA team that examined prospective retention by press and WEST.

GWLA colleagues shared insights from their efforts to coordinate a prospective effort among GWLA members to retain output from small presses. The main challenge is one that the NjF Working Group also anticipates: cultivating the culture of committing resources to retain prospectively. GWLA colleagues saw potential in partnering with WEST, should this proposal move forward, to mobilize a coalition of the willing across WEST and GWLA to participate in a pilot proof of concept that moves the community as a whole into prospective retention and collaborative collection development.

WEST Print-only Journals for Prospective Retention Pilot Project

Brief Description

Pilot project to test prospective journal collection, targeting print-only titles not yet retained by WEST.

At a Glance

- Establish prospective acquisition and retention agreements for journals that continue only to be published in print.
- Begin with a pilot approach including at least one willing Builder to test the concept and workflows.
- Pilot will begin with identifying candidate titles from the unarchived universe⁶ because the necessary data are most readily available and most up to date in the unarchived data set, but can be expanded to address commitments on existing archived titles, effectively ensuring ongoing access to the full run of most print-only WEST journals, not just the backfiles.

Background

WEST considers active journals available only in print as a particular area of risk. WEST also considers ongoing print subscriptions to be some indication of the value of the content. For these journals, Archive Builders will be asked to agree to not only retrospectively commit their backfiles for print retention, but also commit to ongoing collecting (as long as the title continues to be published in print) and retention through the WEST retention date (December 31, 2035).

Developing a program to prospectively commit to the retention of lesser used print serials or journals has the potential to unintentionally damage their market, should libraries that subscribe to them choose to

⁶ The necessary data, including archive type, publication status, and open-ended holdings are most readily available and most up to date in the unarchived data set. Additional data collection will be necessary to deploy this work based on the archived data set.

end their subscriptions and rely on ILL access, as a result of the program. It is just as likely, however, that a decline in print subscriptions (which is bound to occur, regardless of WEST actions) will result in these same publications either moving to digital access or ceasing publication entirely.

Preliminary Analysis of Eligible Journal Families for Prospective Retention

To support this proposal, the project team undertook preliminary analysis of the possible universe of content for prospective retentions. WEST could approach this endeavor from the position of securing retentions for titles yet to be archived (also known as unarchived), or by expanding the scope of existing commitments on archived titles. This analysis and the proposal focuses on the universe of titles that have not yet been retained (unarchived titles), primarily because that data is the most readily available.

Unarchived Analysis Summary (data submitted originally in 2019)

Criteria

- Ulrich's Status: Active
- Holdings: End with "-" (indicating open holdings)

Results

- 1,168 Journal Families
- Primarily Silver and Gold Archive Types (only 49 Bronze Journal Families)
- Average Range in Years: 40.9
- Majority "Academic/Scholarly" (62%)
- 264 Refereed

Collections Model

- Print-only, active titles not yet retained by WEST⁷
 - Title Category 5 (no electronic presence per analysis)
 - Designated as "active" per Ulrich's data
 - Characterized by open-ended holdings at the proposed archiver
- Seed list generated by WEST program staff, guided by OCC, with opportunity for members to nominate additional titles
- Proposals are prioritized during regular collections analysis on the basis of criteria outlined by OCC and approved by the Executive Committee

Operations Model

Potential Partners:

- WEST Archive Builders
- HathiTrust and/or JSTOR, if digitization is prioritized in the future

Implementation steps:

1. WEST Program will coordinate proposals for prospective commitments.
 - a. TBD: Prospective proposals will appear under a new title category in AGUA.

⁷ Per the initial analysis, this amounts to approximately 368 journal families. WEST could expand that scope to include titles held only by non-Archive Builders leveraging new reporting capabilities in AGUA that expose previously unanalyzed titles. Scope could be further expanded to address titles already archived by WEST members that fit these parameters. As outlined in the initial analysis, it is harder to identify candidates from the archived titles based on the information we have, but the previously archived titles undoubtedly include important candidates for this project.

2. Pilot Archive Builder(s) will commit to continue to acquire and retain upon accession, on behalf of WEST, proposed journal families.
3. Commitments will be recorded in an amendment to the original member agreement, which is signed by the participating Archiver (*forthcoming - Amendment Template*).
4. Participating Archivers will acquire the content of their committed journals, record retention notes in the records upon accession, and disclose those retentions in agreed upon systems annually (*forthcoming - Addendum to the WEST Disclosure Guidelines*).
 - a. Committed journals will be subject to physical validation and storage environment per guidelines for the Gold Archive Type.
5. Participating Archivers will make retained content available to WEST members under the WEST Access Policy.

Business Model

[if digitization is a priority aspect of this proposal, additional investigation and clarification is required around associated costs]

- Estimated costs for WEST members (financial or in-kind)
 - Financial commitment by participants to continue print subscriptions for commitments through December 31, 2035.
 - In-kind staff resources to record and update retention notes upon accession, disclose to agreed upon systems, and provide access to the content.
 - Physical validation of new Gold journal commitments will be subsidized per existing Builder agreements, but physical validation of ongoing accessioning will not be subsidized (accession is its own kind of validation).
 - TBD digitization support.
- WEST program resourcing
 - Additional analysis and coordination to add a new category of proposals to standing WEST analysis and proposal processes.
 - Generation of supporting documentation and policy addendums, as necessary.
 - Enhance AGUA to accommodate a new title category, as necessary (development).