Western Regional Storage Trust

WEST Member Meeting
Harnessing the value of shared print through local action

July 26, 2024

10am-12pm PDT/MST
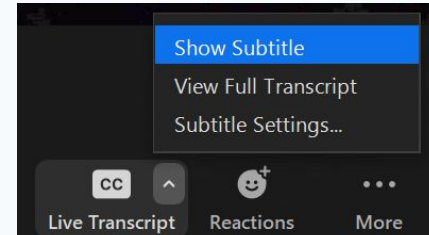
11am-1pm MDT

12-2pm CDT

1-3pm EDT

Sound and Visual Check

Can you hear the presenter?

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Zoom Live Transcript is enabled →

This meeting is being recorded.

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Michael Brewer (WEST Executive Committee Chair)

Alison Wohlers (WEST Program Manager)

Welcome & Overview

Today's Agenda

1. Welcome to new WEST members and staff!
2. Future of WEST Planning & Implementation Updates
   a. Near-term recommendations
   b. Longer-term investigations
      i. WEST Internet Archive Pilot
      ii. The National Effort - The Shared Print Partnership
      iii. Enhanced WEST ILL Partnership
   c. Continued Executive & OCC strategic planning
3. Panel Discussion: Harnessing the value of shared print through local action

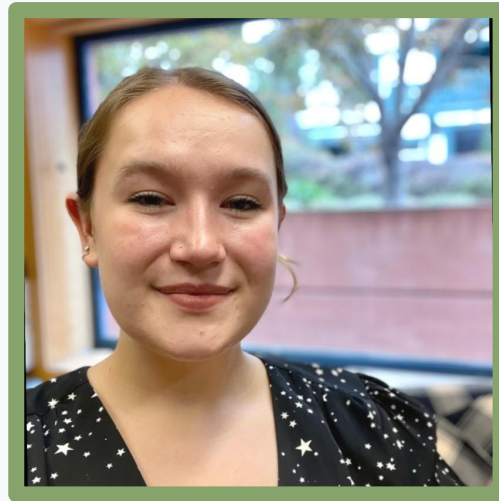# Welcome to new WEST members and staff!

Welcome to WEST!

Consortial Membership - Consortium for Academic and Research Libraries in Illinois (CARLI)

❖ CARLI libraries joining in FY 24-25 -

➢ Loyola University Chicago

➢ Southern Illinois University, Medical Library

➢ Illinois Institute of Technology, Galvin Library

Welcome to WEST!

Nika Worth - our new WEST Shared Print Analyst!

Future of WEST Planning & Implementation Updates

Strategic Planning in WEST

2009-2010	2011-2013	2014-2016	2017-2018	2019-2023	2024 -
Planning Phase	Phase 1 - Implementation	Phase 2 - Expansion	Transition to sustainability	Evolution of WEST July 2023 Member Meeting August 2023 Member Survey 67% response rate	Future of WEST

Major priorities

❖   Expand & enhance access

❖   Expand & enhance the national effort

❖   Diversify the collective collection

❖   North star: collaborative collection development
     (prospective shared print)

Near-term Recommendations

Expand and enhance the national effort

Diversify the collective collection

Expand and enhance access

| Systems Development Capacity | Membership Model | Collections Analysis & Archiving | Digitization | Enhanced ILL Partnership | National Preservation Network |

Diversify the collective collection

Expand and enhance access

Expand and enhance the national effort
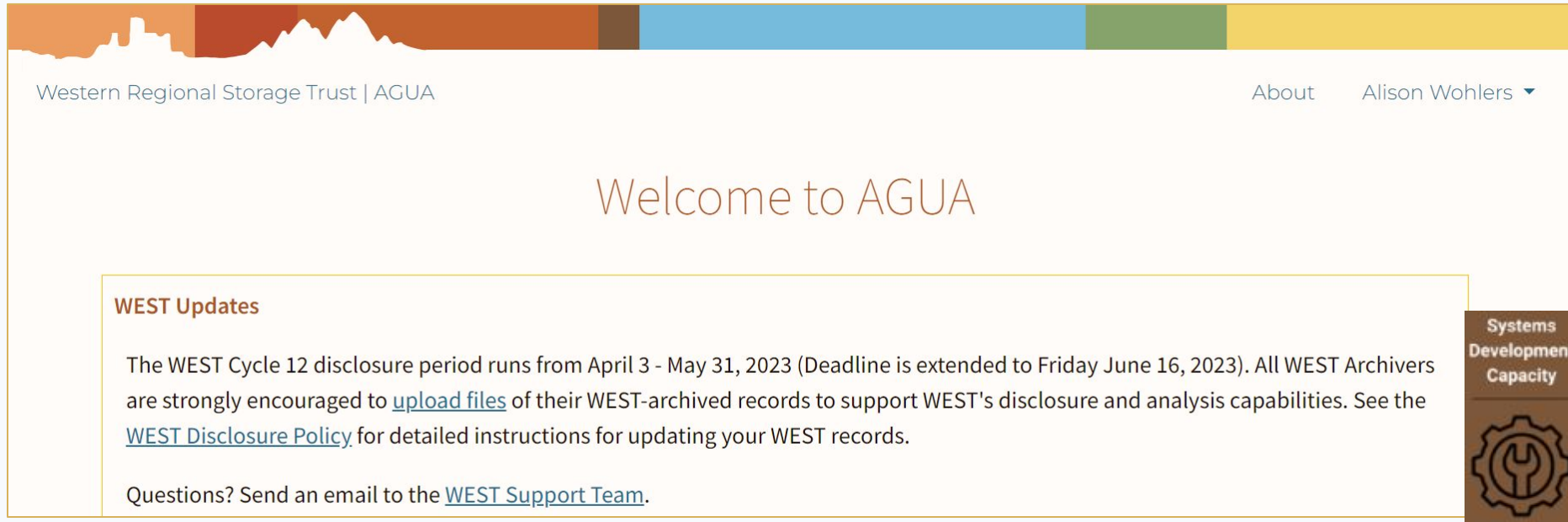North star: collaborative collection development

Longer-term Investigations

Near-term recommendations

What is AGUA?

❖ Web-based suite of tools for…

➢ Data normalization, collections analysis, collection decision-making

❖ Custom-built for WEST

Western Regional Storage Trust | AGUA   About   Alison Wohlers ▾

Welcome to AGUA

WEST Updates

The WEST Cycle 12 disclosure period runs from April 3 - May 31, 2023 (Deadline is extended to Friday June 16, 2023). All WEST Archivers are strongly encouraged to upload files of their WEST-archived records to support WEST's disclosure and analysis capabilities. See the WEST Disclosure Policy for detailed instructions for updating your WEST records.

Questions? Send an email to the WEST Support Team.

Systems
Development
Capacity

WEST Member Resources

Functions

Upload Bibliographic and Holdings Data

- Upload Your File

- Set Storage Location and Exclusion Flags

Set Archiving Commitments

- Review Proposed Journals

- Review Budgets

Call for Holdings

Collections Reports and Downloads

On Demand Comparison Report

My Institution's Reports ▼

WEST Archived Collections ▼

WEST Group Reports ▼

Contacts

Contact WEST Staff ✉

Institution Contact Roster

Member Institutions

Systems Development Capacity

Future of WEST -
AGUA Systems Development Capacity

- ❖ **Recommendation**: Keep maintaining what we have; reduce capacity for building new features
- ❖ **Member feedback:**
  - ➤ 90% agreed with the recommendation
  - ➤ 7% trusted the WEST Executive Committee to make the decision
  - ➤ Themes
- ❖ **Status:** Implemented
- ❖ **The path forward:** Development period to start in January

Membership and Cost Share

WEST is supported by

❖ Financial cost-share (member fees)

❖ In-kind contributions by members

Consortial membership

❖ Opt-in

❖ Single agreement

❖ Consolidated invoicing

❖ Consortial vote

Membership years begins July 1

❖ Opportunity to join mid-year

How member fees are calculated and assessed

❖ Fixed fees are tiered

❖ As of FY24-25 - Average of 2019, 2020, and 2021 total library expenditures data

❖ Annual 3% increase to account for inflation

Membership & Fee Model

Future of WEST - Membership & Fee Model

- ❖ **Recommendations:**
  - ➢ Membership types
  - ➢ Fee model
  - ➢ Frequency & process for calculating member fees
- ❖ **Member feedback:**
  - ➢ 95% or more supporting each recommendation
- ❖ **Status:** Implemented
- ❖ **The path forward:** Continued engagement with feedback from members

Collection & Risk Model

Risk Level	Definition	Risk Mitigation	Who
Low	Available electronically in Portico, CLOCKSS, HTDL, or JSTOR	Retention commitment disclosure only	Archive Holders Archive Builders
Medium	Some full text availability in commercial databases	Retention commitment disclosure Physical validation Transfer to storage	Archive Builders
High	Electronic abstracting and indexing only No electronic presence	Retention commitment disclosure Physical validation Transfer to storage	Archive Builders
	Higher risk materials not held by any of the Archive Builders	*Retention commitment disclosure only (validation & storage encouraged)*	*Archive Holders*

Collections
Analysis &
Archiving

Future of WEST -
Collections Analysis & Archiving Models

❖ **Recommendations**: updates to…

➤ Analysis and archiving proposal process

➤ Validation and disclosure requirements

❖ **Member feedback:**

➤ Strong support for the recommendations

➤ Feedback on ongoing considerations

❖ **Status:** Implementation is in progress; communication to members will come soon!

❖ **The path forward:** Communication with members

Near-term recommendations

Systems Development Capacity

Membership & Fee Model

Collections Analysis & Archiving

Implemented!

Implementation in progress

Questions?

Longer-term Investigations

Digitization - WEST Internet Archive Pilot

Shari Laster, Arizona State University
WEST Internet Archive Pilot Implementation Task Force &
WEST Executive Committee Member

Western Regional Storage Trust

What is the pilot?

A coordinated donation of WEST additional copies to the Internet Archive for digitization, focusing on items already retained in WEST but not available in a trusted digital repository.

Digitization

What are the benefits?

For WEST and its Member Libraries:

- Additional or new digital copies with access via ILL and print disabled access requests

- Positive communication framing for deselection projects

For Internet Archive:

- Expansion of their digital serial and journal collection

- Library expertise and feedback on processes and workflows

For the Library Community:

- Additional or new digital copies with access via ILL and print disabled access requests

- Testing new workflows that other organizations could adopt or adapt

Digitization

Play to everyone's strengths and existing work
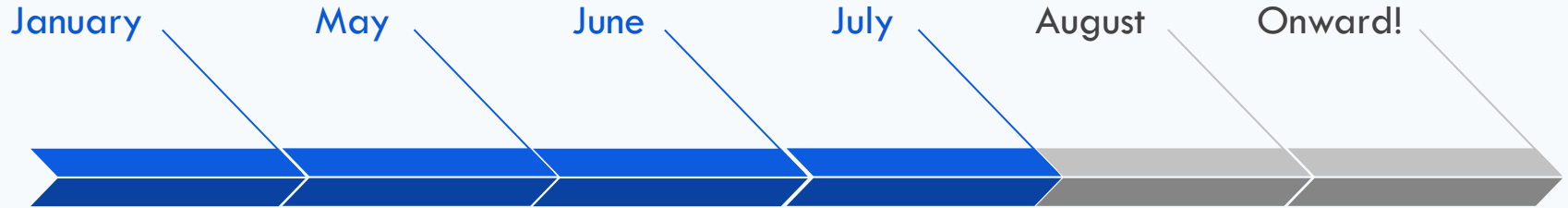
❖ WEST - group data aggregation, analysis, and coordination of collective action

❖ Member libraries - collections and collection decision-making

❖ Internet Archive - digitization and ongoing access

Digitization

Match-making with the pilot libraries

★ Planning or currently engaged in serial review & weeding

★ Able to commit staff time to test new workflows

★ Volume of target content presents a good value proposition

  ○ WEST conducts an initial comparison to help the libraries assess this

★ Potential other factors

  ○ Priority level of the content (i.e. fewer existing digital access points)

  ○ Completeness of holdings

  ○ Low overlap among pilot libraries (i.e. ensuring that we are addressing a range of content)

Digitization

WEST IA Pilot - Timeline 2024

January — **May** — **June** — **July** — August — Onward!

1. Task force crafts workflows & guidelines

2. Distribute call for expressions of interest to members

3. First meeting with potential pilot libraries

4. Task force completes its work

5. Second meeting with potential pilot libraries

6. Finalize participating pilot libraries

7. Report to OCC

8. WEST Project Team administers the pilot; the WEST Operations and Collections Council oversees the pilot

Digitization

Future iterations and potential expansions…

❖ 'Gap-filling' the digitized run

❖ Regular operationalization alongside print archiving work

Digitization

Internet Archive Pilot Implementation Task Force Members

- ❖ Bob Heyer-Gray (UC Davis)

- ❖ Megan Sallabedra (Getty Research Institute)

- ❖ Michele Potter (UC Riverside)

- ❖ Shari Laster (ASU)

- ❖ Lidia Uziel (UC Santa Barbara)

- ❖ Liz Rosenberg (Internet Archive Liaison)

- ❖ Alison Wohlers (WEST) - convener

Digitization

Questions?

Enhanced WEST ILL Partnership

Current state

- ❖ WEST Access Policy
  - ➢ WEST archives only
  - ➢ Local lending policies
- ❖ Resource sharing groups
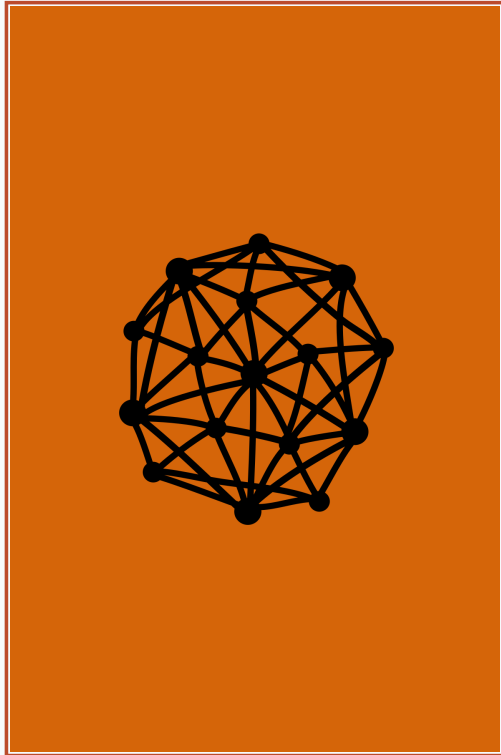 - ➢ OCLC Profiled Group
  - ➢ RapidILL pod

Opportunities

❖ Maintaining a consistent level of access to titles that were deaccessioned

❖ Ease operational requirements

❖ Distribute responsibility across all members

❖ Align WEST with national peers

Enhanced ILL
Partnership

Member feedback from the 2023 survey

❖ Respondents support:

➢ an expanded scope for the WEST Access Policy as a benefit of membership.

➢ an expanded WEST Access Policy that covers both WEST archived collections and general circulating collections.

❖ Respondents placed the highest value on:

➢ response/turnaround time

➢ accessibility of scans in an updated policy

Enhanced ILL Partnership

Enhanced WEST ILL Partnership

❖ **Status:**

➢ WEST Operations and Collections Council engaged with the survey results

➢ On hold as of early 2024

❖ **The path forward:**

➢ Picking this back up

➢ Draft policy changes and seek feedback from resource sharing experts
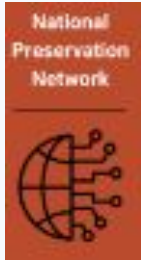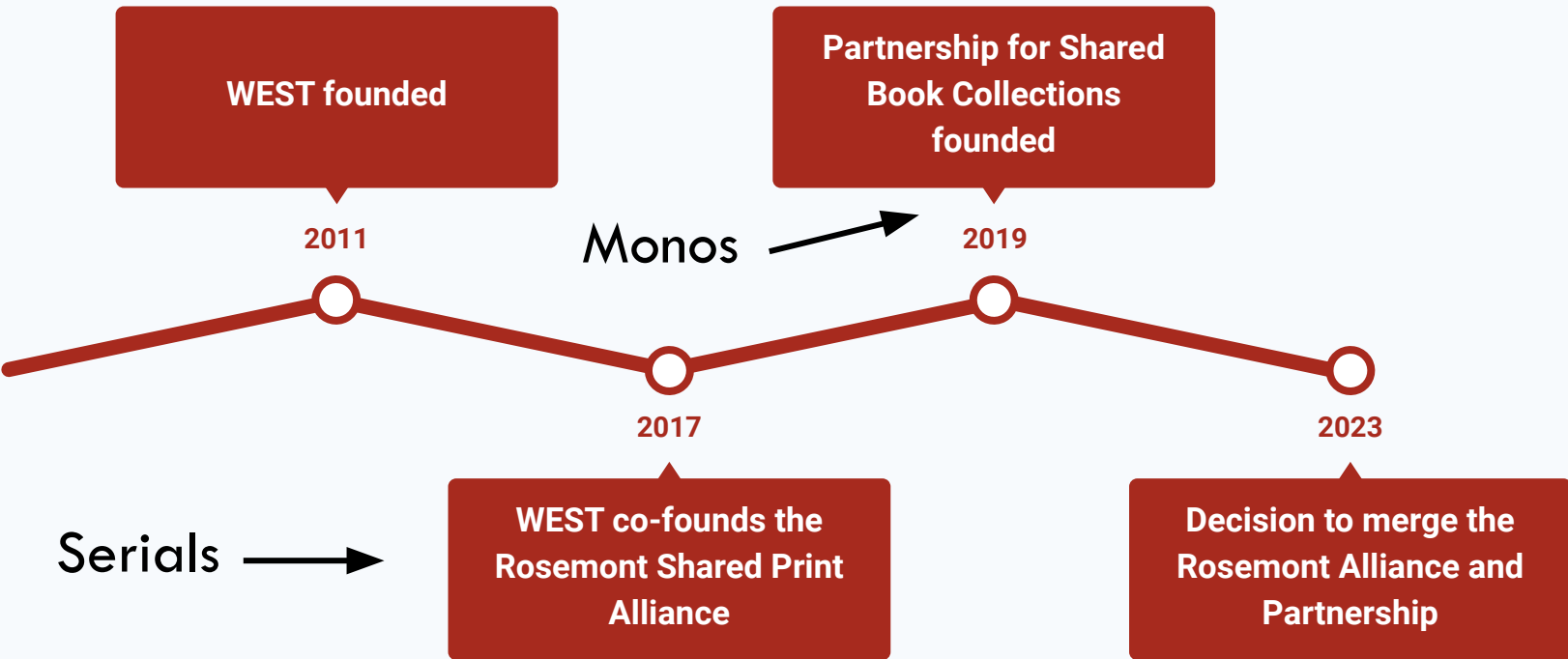
Questions?

Expanding National Collaborative Activities

This is a high value proposition for my organization, libraries writ large. Multiple shared print groups can appear to be disparate, competing, entities. A collective collection requires a high level coordination and engagement for it to work and for it to be viewed as it needs to be: serious, committed, and professional. If done right it become as ingrained in the brains of faculty as their preferred reliable research database or journal.

Opportunities to

❖ gain new efficiencies; cultivate intentional redundancy

❖ develop new services like collab. collection development

❖ widen the collection that is retained

❖ simplify preservation for libraries

❖ provide support to individual libraries through a unified national strategy for print preservation and access

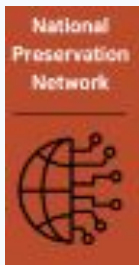# Regional Programs & National Federations

Rosemont Member Programs

1. Big Ten Academic Alliance
2. CRL (joined in 2020)
3. EAST (joined in 2018)
4. FLARE
5. Scholars Trust (ASERL/WRLC)
6. WEST

Working with Rosemont partners…

❖ Last Known Copy Initiative

❖ Reciprocal retention agreement

❖ Access principles

❖ Best practices: Metadata, validation, storage
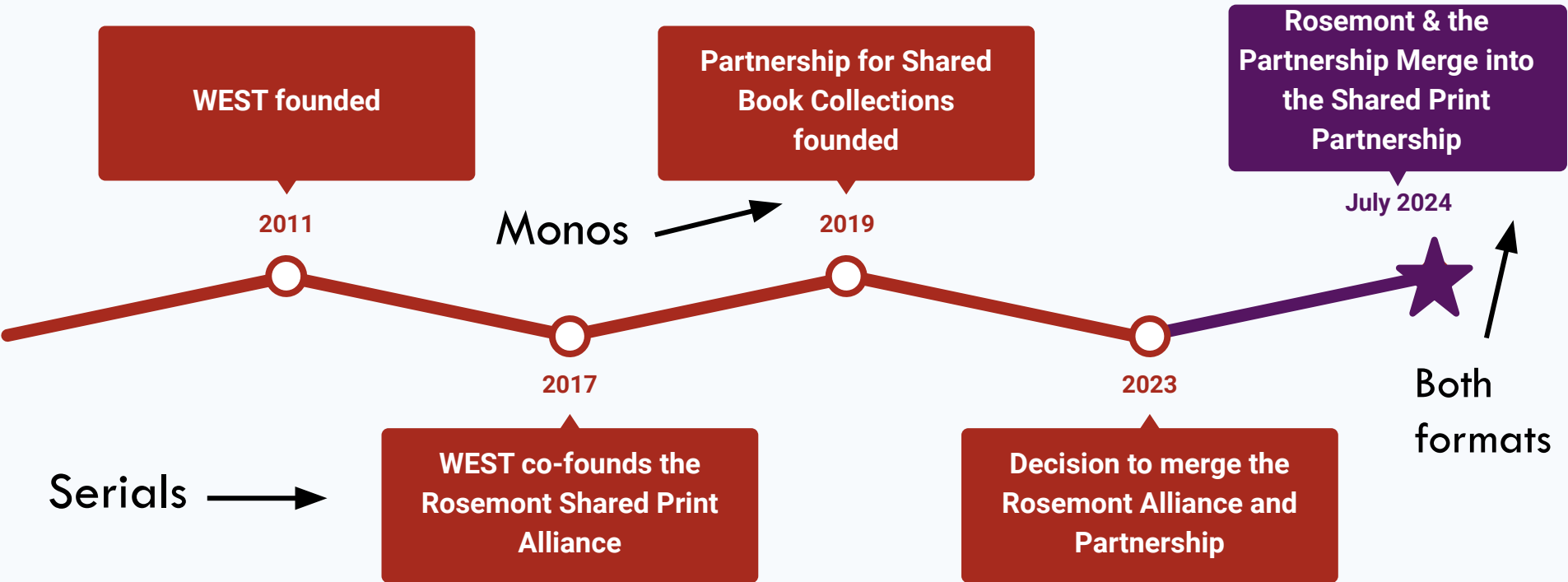
National
Preservation
Network

Partnership Member Programs

1. Academic Libraries of Indiana
2. Center for Research Libraries (CRL)
3. Colorado Alliance of Research Libraries
4. Council of Prairie and Pacific University Libraries (COPPUL)
5. Eastern Academic Scholars' Trust (EAST)
6. Keep@Downsview
7. HathiTrust
8. Maine Shared Collections Cooperative (MSCC)
9. MCLS/MI-SPI
10. Minnesota Cooperative Collection Management program

11. Private Academic Library Network of Indiana (PALNI)
12. North: The Canadian Shared Print Network / Nord: Réseau canadien de conservation partagée des documents imprimés (North/Nord)
13. The Research Collections and Preservation Consortium (ReCAP)
14. SCELC Shared Print Program
15. University of California Libraries (UC Libraries)
16. Washington Research Library Consortium (WRLC)
17. Virginia's Academic Library Consortium (VIVA)

National Preservation Network

The Path Forward - The Shared Print Partnership

WEST founded

2011

WEST co-founds the Rosemont Shared Print Alliance

2017

Partnership for Shared Book Collections founded

2019

Monos

Serials

Decision to merge the Rosemont Alliance and Partnership

2023

Rosemont & the Partnership Merge into the Shared Print Partnership
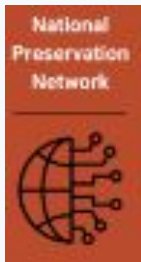
July 2024

Both formats

The Path Forward - The Shared Print Partnership

❖ There will be a 'bridge year' from July 1, 2024 - June 30, 2025

❖ The Bridge-Year Executive Committee will vote on a $3000 per program (not per library) annual membership fee for the bridge year

❖ WEST will participate in the bridge year

National
Preservation
Network

The Path Forward - The Shared Print Partnership

❖ gain new efficiencies; intentional redundancy

❖ develop new services like prospective shared print

❖ widen the collection that is retained

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❖ provide support to individual libraries through a unified

national strategy for print preservation and access

National
Preservation
Network

Questions?

Longer-term Investigations

Digitization

Enhanced ILL Partnership

National Preservation Network

WEST
Internet
Archive Pilot

Picking back up
this fiscal year

The Shared Print
Partnership

Jo Anne Newyear-Ramirez, UC Berkeley

WEST Executive Committee vice chair

Continued Strategic Planning

Building on the Future of WEST

❖ The WEST Executive Committee and Operations & Collections Council held a hybrid all-day meeting on June 27th in San Diego, CA

❖ Topics

➢ WEST governance

➢ Shared print and WEST today

➢ WEST & the Shared Print Partnership

➢ Sustainability

Key takeaways & areas of action

❖　Communication & storytelling

❖　Consortial collaborations & intersections to increase impact
and sustainability

❖　Affirmation of the Future of WEST longer-term investigations

➢　Access

➢　Digitization

➢　National effort

More information soon!

Questions?

Panel Discussion

Harnessing the value of shared print through local action

Panelists:

- Michael Brewer (University of Arizona, WEST Executive Committee chair)
- Amanda Sprochi (University of Missouri, WEST Archive Builder)
- Wil Weston (San Diego State University, WEST OCC member)
- *Moderator*: Alison Wohlers (WEST Program Manager)

Audience Questions & Discussion

Thank you & closing

Michael Brewer (University of Arizona, WEST Executive Committee chair)

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Nika Worth, WEST Shared Print Analyst
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https://cdlib.org/west/