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?
(please note any audio issues in the chat)

Zoom Live Transcript is enabled →

This meeting is being recorded.
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
Welcome & Overview

Michael Brewer (WEST Executive Committee Chair)
Alison Wohlers (WEST Program Manager)
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
<table>
<thead>
<tr>
<th>Year</th>
<th>Phase</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009-2010</td>
<td>Planning Phase</td>
<td></td>
</tr>
<tr>
<td>2011-2013</td>
<td>Phase 1 - Implementation</td>
<td>July 2023 Member Meeting</td>
</tr>
<tr>
<td>2014-2016</td>
<td>Phase 2 - Expansion</td>
<td>August 2023 Member Survey 67% response rate</td>
</tr>
<tr>
<td>2017-2018</td>
<td>Transition to sustainability</td>
<td></td>
</tr>
<tr>
<td>2019-2023</td>
<td>Evolution of WEST</td>
<td></td>
</tr>
<tr>
<td>2024-</td>
<td>Future of WEST</td>
<td></td>
</tr>
</tbody>
</table>
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

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 access
Expand and enhance the national effort

Longer-term Investigations

North star: collaborative collection development
Near-term recommendations
What is AGUA?

❖ Web-based suite of tools for...

➢ Data normalization, collections analysis, collection decision-making

❖ Custom-built for WEST
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
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

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 years begins July 1
❖ Opportunity to join mid-year
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
<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Definition</th>
<th>Risk Mitigation</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Available electronically in Portico, CLOCKSS, HTDL, or JSTOR</td>
<td>Retention commitment disclosure only</td>
<td>Archive Holders</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Archive Builders</td>
</tr>
<tr>
<td>Medium</td>
<td>Some full text availability in commercial databases</td>
<td>Retention commitment disclosure</td>
<td>Archive Builders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Physical validation</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transfer to storage</td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>Electronic abstracting and indexing only</td>
<td>Retention commitment disclosure</td>
<td>Archive Builders</td>
</tr>
<tr>
<td></td>
<td>No electronic presence</td>
<td>Physical validation</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transfer to storage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Higher risk materials not held by any of the Archive Builders</td>
<td>Retention commitment disclosure only (validation &amp; storage encouraged)</td>
<td>Archive Holders</td>
</tr>
</tbody>
</table>
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

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
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.
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
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
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)
WEST IA Pilot - Timeline 2024

January
1. Task force crafts workflows & guidelines
2. Distribute call for expressions of interest to members
3. First meeting with potential pilot libraries

May
4. Task force completes its work
5. Second meeting with potential pilot libraries

June
6. Finalize participating pilot libraries

July
7. Report to OCC

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

Onward!
Future iterations and potential expansions...

- ‘Gap-filling’ the digitized run
- Regular operationalization alongside print archiving work
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
Questions?
Current state

❖ WEST Access Policy
  ➢ WEST archives only
  ➢ Local lending policies

❖ Resource sharing groups
  ➢ OCLC Profiled Group
  ➢ RapidILL pod

Enhanced WEST ILL Partnership
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
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 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

- WEST founded in 2011
- Partnership for Shared Book Collections founded in 2019
- WEST co-founds the Rosemont Shared Print Alliance in 2017
- Decision to merge the Rosemont Alliance and Partnership in 2023
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
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)
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)
The Path Forward - The Shared Print Partnership

- WEST founded: 2011
- Partnership for Shared Book Collections founded: 2019
- WEST co-founds the Rosemont Shared Print Alliance: 2017
- Decision to merge the Rosemont Alliance and Partnership: 2023
- Rosemont & the Partnership Merge into the Shared Print Partnership: July 2024
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
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
❖ simplify preservation for libraries
❖ provide support to individual libraries through a unified national strategy for print preservation and access
Questions?
Longer-term Investigations

WEST Internet Archive Pilot

Picking back up this fiscal year

The Shared Print Partnership
Continued Strategic Planning

Jo Anne Newyear-Ramirez, UC Berkeley
WEST Executive Committee vice chair
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?
Harnessing the value of shared print through local action

Panel Discussion
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)

Alison Wohlers, WEST Program Manager
alison.wohlers@ucop.edu

Nika Worth, WEST Shared Print Analyst
nika.worth@ucop.edu

https://cdlib.org/west/