Retaining and Preserving the Scholarly Record: An Update on the Eastern Academic Scholars' Trust

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From NERD to EAST

- Initial planning 2012-2014 – Mellon Foundation Officer's Grant to Five Colleges, Incorporated
- Academic and research libraries in New England, New York and Pennsylvania
- Large scale collection analysis
- BLC to act as host institution
- Currently awaiting funding

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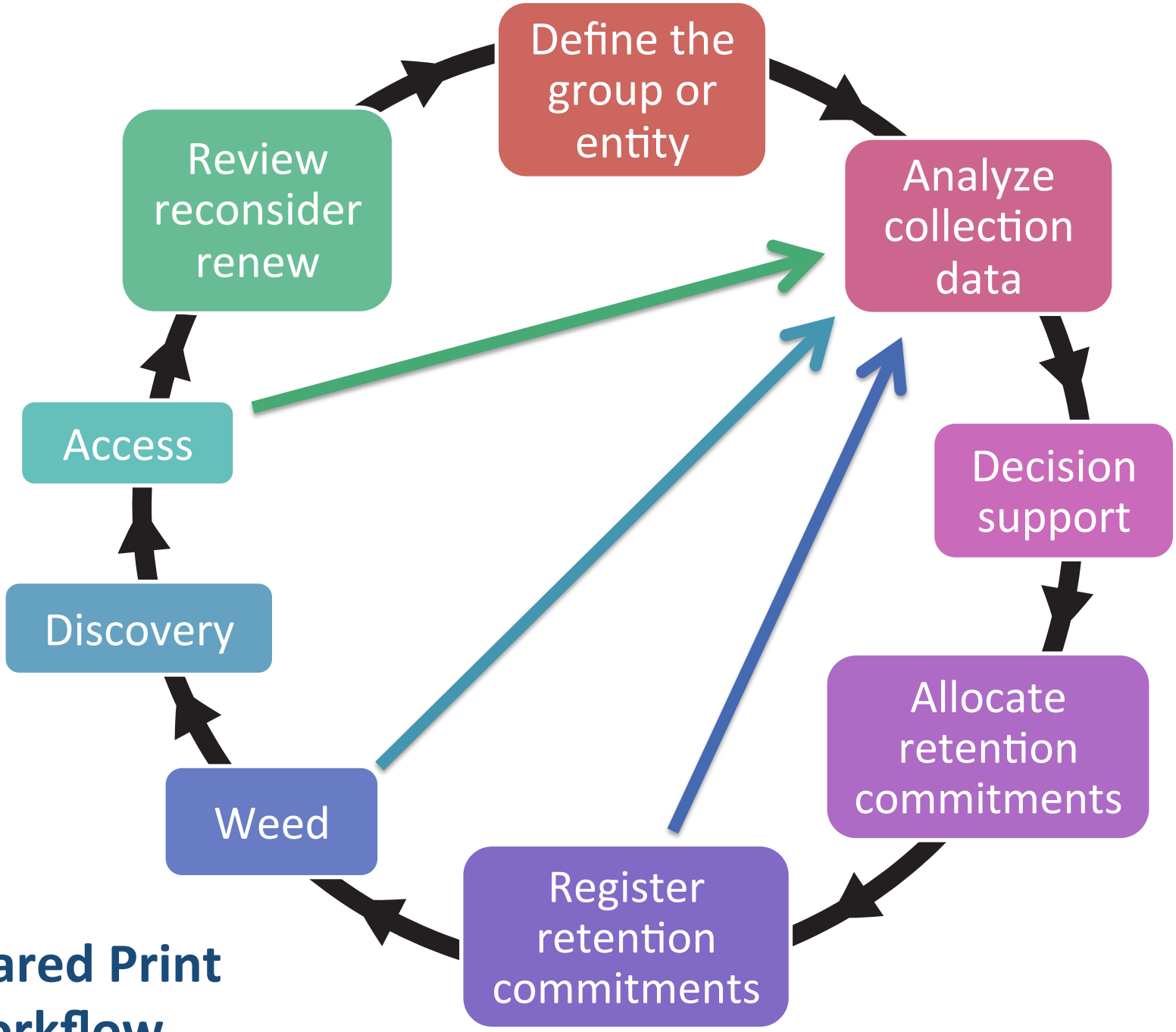

Shared Print Workflow

EAST project goals

- Analyze 20M+ monographs in order to propose commitments to be made by retention partners
- Design, test and analyze a sample-based validation study
- Secure retention commitments
- Finalize EAST policies and business model
- Plan for the future of EAST
- Explore relationships with other regional and national shared print programs

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The EAST Membership

- Two forms of membership
  - Retention Partners
  - Supporting Partners
- Annual membership fees
- Contribution to offset large scale [and expensive] collection analysis
- 47 current members
  - 37 as monograph retention partners (some also for journals)
  - 1 as journal retention partner only
  - 9 as Supporting Partners
- Coordination with Maine Shared Collections and ConnectNY as retention commitments are made

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Anticipated business model for EAST

- Decentralized print retention and sharing
- Organizational development supported by grant funding
- Members contribute annual fees and modest portion of offset for collection analysis
- Projecting adding Retention Partners in Year 3 with additional round of collection analysis
- Ongoing sustainability via members' fees

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Retention in EAST

- Minimum of 15 year retention commitment for both monographs and serials
- Formal – but lightweight – agreement
- Retention commitments to be revisited at least 2 years before they end and at least every 5 years after that
- May be recalibrated in light of yet to be established national or international efforts

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Collection analysis

- Very large scale with over 20 million volumes to be analyzed
- Compares circulating monograph holdings of participating members
- 40 EAST libraries will participate in first group
  - 34 new data
  - 6 recent SCS analyses
- Monograph Working Group
- Decision support for modeling of various scenarios

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Validation

- Goal is to build trust in retention commitments
- EAST will focus on inventory confirmation
- Two stage sampling process
  - Random sample of volumes from full collections – to determine level of confidence in existence
  - Stratified sample at the consortium level based on level of redundancy – to inform number of copies retained

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Access and delivery

- EAST is a light archive
- Holdings discoverable using existing systems
- Fulfillment of request for materials through ILL using existing systems
- Current plan is for no charge for ILL to other EAST members

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Project staffing

- 1.5 FTE for EAST staff
  - Project Manager and Data Librarian
- Lizanne Payne, Shared Print Consultant
- Statistical Consultant to design and analyze validation study
- Mellon Foundation proposal
  - John Unsworth of Brandeis and Laura Wood of Tufts as Co-Principal Investigators
  - Susan Stearns, BLC, as Project Director

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Timeline

- Pre-grant activities – Spring, 2015
  - Elect Executive Committee
  - Begin work on MOU
  - Establish Working Groups
- Year 1 July, 2015 – June, 2016
  - Hire staff
  - Reconfirm or revise policies
  - Validation study #1
  - Monograph collection analysis

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Timeline

- Year 2 July 2016 – June 2017
  - Validation study #2
  - Finalize retention agreements
  - Define future EAST membership
  - Collaborate with other regional/national shared print initiatives

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Collaboration with other projects

- Coordinate with existing retention commitments
- Work to align with evolving regional and national initiatives
- We see EAST as the beginning of a more thoughtful and coordinated approach to print management

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More information on EAST

- For information on the planning done through Five Colleges: https://www.fivecolleges.edu/libraries/regionalproject
- To join the "interested parties" mailing list for EAST or discuss possible membership, contact Susan Stearns at the BLC: sstearns@blc.org or stay tuned through the BLC website: www.blc.org

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Thank you!

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