Partnership for Shared Book Collections

Annual Member Meeting
June 8, 2021
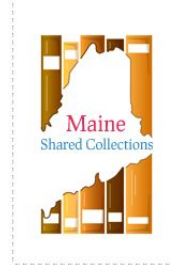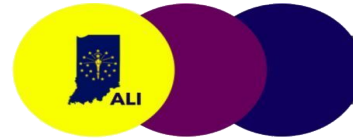
PARTNERSHIP FOR SHARED BOOK COLLECTIONS

Housekeeping

Please keep yourself muted!

Use Speaker View

Questions in Chat to Everyone

Group Notes: https://bit.ly/PSBC2021MemberMeeting
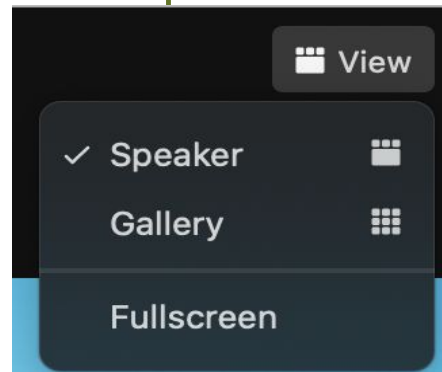
PARTNERSHIP FOR SHARED BOOK COLLECTIONS

Agenda

Welcome and overview of the Partnership from Kirsten Leonard, Partnership Executive Committee Chair

Intro on WG from Matthew Revitt, Partnership Operations Committee Chair

Updates from Working Groups:

- Best Practices, Tony Fonseca
- Communications and Advocacy, Susan Stearns
- Infrastructure, Linda Wobbe
- Research and Network Level, Ian Bogus

10 minute break

DEI Discussion (90 minutes starting at approx 2pm EST)

EC members will stick around if you have questions at the end - make a note of questions

PARTNERSHIP FOR SHARED BOOK COLLECTIONS

http://sharedprint.org

PARTNERSHIP FOR SHARED BOOK COLLECTIONS

About ˅   Membership   Best Practices ˅   Resources ˅   Search here...

About & Background

See also the Partnership PAN and Quarterly Reports.

About the Partnership

**Have Questions?
Consult the FAQ**

The Partnership for Shared Book Collections is a federation of monograph shared print programs in the U.S. and Canada whose mission is to ensure the long-term preservation of, access to, and integrity of monographic print resources. The Partnership supports both established and fledgling monograph shared print programs by coordinating collaboration for the protection of print books. Through the development of best practices, support of research on the risks to the loss of the print scholarly record, and advocacy for improving the infrastructure to support shared print, the Partnership identifies work that can be done collectively to advance mission-critical services while saving time and money locally. The member programs have already committed to retain over 40 million books (and growing!) primarily in academic and

https://sharedprint.org

PARTNERSHIP FOR SHARED BOOK COLLECTIONS

Executive Committee Members

- Chair: Kirsten Leonard, Executive Director, PALNI (FY21-FY22)
- Vice Chair: Daniel Dollar, Associate University Librarian for Scholarly Resources, Yale University (FY21-FY23)
- Past Chair: Susan Stearns, Project Director, EAST (FY21-FY22)
- Tina Baich, Senior Associate Dean for Scholarly Communication & Content Strategies, IUPUI University Library (FY21-FY22)
- George Machovec, Executive Director, Colorado Alliance of Research Libraries (FY21-FY23)
- Steven Mandeville-Gamble, University Librarian, UC Riverside (FY21-FY23)
- Peggy Seiden, College Librarian, Swarthmore College (FY21-FY23)

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Executive Committee Action Plan

- Advocacy and communication to Shared Print stakeholders and funders
- Controlled digital lending and Shared Print collections
- Address the impact on shared print from loss and change of library leadership and influence as financial pressures increase
- Diversity, equity and inclusion of Shared Print members and their collections
- Develop and implement a research agenda focused on issues of importance to shared print

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Welcome to our two new Executive Committee Members

Matt Rosendahl

Library Director, University of Minnesota Duluth /
Minnesota's Council of Academic Library Directors
Cooperative Collection Management Project

Gwen Bird
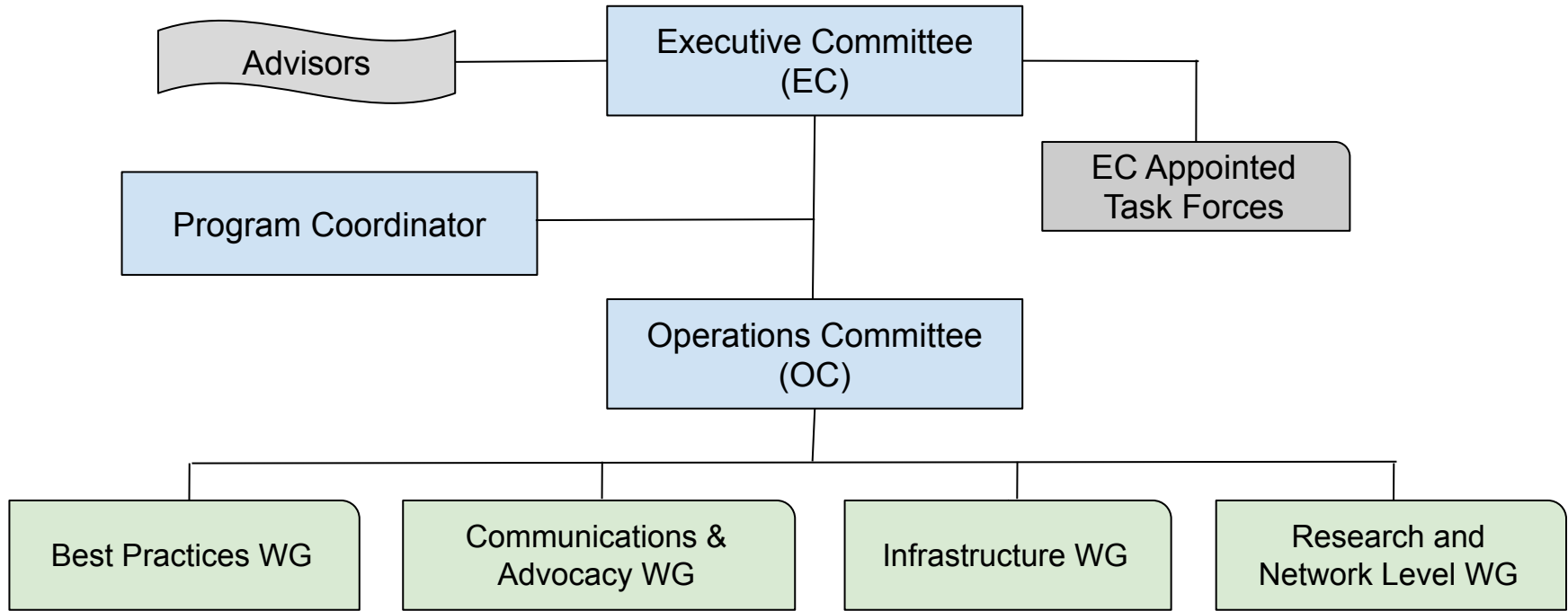
Dean of Libraries, Simon Fraser University/

COPPUL

PARTNERSHIP FOR SHARED BOOK COLLECTIONS

Partnership Organizational Structure

Advisors

Executive Committee (EC)

EC Appointed Task Forces

Program Coordinator

Operations Committee (OC)

Best Practices WG

Communications & Advocacy WG

Infrastructure WG

Research and Network Level WG

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Operations Committee

- **Matthew Revitt (Chair)** - MSCC
- **Pam Jones (Vice Chair)** - ConnectNY
- **Heather Weltin** - HathiTrust
- **Linda Wobbe** - SCELC
- **Ian Bogus** - ReCAP
- **Susan Stearns** - EAST (liaison to the EC)

- **Paul Moeller** - Colorado Academic Alliance of Libraries
- **Allison Thome** - Minnesota Cooperative Collection Management
- **Alison Wohlers** - WEST & University of California Shared Print Program

Meets monthly to monitor and oversee working groups:
- o Best Practices
- o Communications and Advocacy
- o Infrastructure
- o Research and Network Level

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Updates from Working Groups: Best Practices

Comprised of members of various shared print programs with various areas of expertise.

Mission: To promote, identify and/or establish best practices for shared print programs, as such best practices can serve as guidelines that will support better decision-making, will speed resource sharing, will strengthen sustainability, and will foster interoperability between programs.

Charge: To identify useful and needed best practices, research current practices, and draft an official document to be disseminated via the Partnership's website (sharedprint.org).

Current members: Heather Weltin and Tony Fonseca (co-conveners), Sara Amato, Alison Armstrong, Doug Brigham, Erika Dickey, Megan Gaffney, Glenn Johnson-Grau, Kathie Mason, Mei Mendez, Sherri Michaels

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Updates from Working Groups: Best Practices

In the past year, the Best Practices Working Group has drafted and posted these Best Practice documents to the Partnership website:

Resource Sharing and Access, Inventory, Programmatic Review and Program Assessment, Transferring Commitments, Metadata and Records Sharing, Preservation, and Exiting a Shared Print Program.

These documents are dynamic and are constantly revisited for accuracy, standardization, and interoperability. Over the course of 2021, the group will be working on these Best Practices documents: Last Copy, Shared Print Data Reporting, Shared Print Education and Awareness, Succession Planning, and Policy and Strategy Development.

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Updates from Working Groups: Communications & Advocacy

A joint Working Group with representation from both the Partnership and our sister organization, the Rosemont Shared Print Alliance

Charge: To support communicating the value, needs, and impact of shared print at scale

Members: Alison Armstrong, John Burger*, Aaron Krebeck, Charlotte M. Johnson, Oya Rieger, Michael Rodriguez, Caitlin Thomas, Susan Stearns, Anna Striker*, Ben Walker*, Marie Waltz*

Previous projects: Development of the [Value of Shared Print video](#) focusing on shared print's important role, even in the time of a global pandemic

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*Rosemont Shared Print Alliance representatives

Communications & Advocacy Working Group: Current Initiatives

Developing a set of concise talking points about how OCLC can better support shared print programs. **The link is here.** Let us know the best communications channels to use.

Concise description of the principles of library shared print retention systems and the benefits of shared print for audiences outside the library profession. **The link is here.**

Methods for building awareness about shared print to Resource Sharing library staff and vendors who provide resource sharing tools.

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Updates from Working Groups: Infrastructure

Charge:

- Develop an understanding of Shared Print program data needs,
- Explore the existing infrastructure capabilities
- Define recommendations and advocate for improvements.

Process: Through the establishment of focused Task Forces (Resource Sharing, Unique Sources, Discovery)

- Evaluate the Use Cases developed by the Open Data Working Group
- Create User Stories / templates defining the who and why of specific infrastructure needs, and How to define success
- Meet with vendors to determine what exists now and what is planned for the near future

Outcome: Report due this fall

Current Members: Linda Wobbe (SCELC) – Chair, David Almodovar (Pace Univ.), Judy Dobry (CDL), Maggie Dull (Univ. of Rochester), Melissa Gasparotto (NYPL), Jennifer Martin (Salisbury Univ.), Tom Teper (Univ. of Illinois), Amy Wood (CRL)

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Updates from Working Groups: Infrastructure Resource Sharing Task Force

Task Force membership includes both Working Group members and practitioners from Partnership libraries

Charge: Investigate resource sharing infrastructure to support shared print programs.

Process: Meetings with vendors (ProQuest/ExLibris, OCLC) and explored the ReCap technical infrastructure to learn if / how the following are supported. We also met with colleagues in Rosemont Alliance / WEST and with CDL / CRL / HathiTrust Collaborative to align our thoughts and discussions. An additional meeting is scheduled with Project ReShare.

1. Identify the kind of access provided for retained holdings
2. Enable analysis of resource-sharing activity for items committed for retention/shared print.
3. Support interoperability with resource-sharing systems to allow retained holdings to be preferred or deprecated for lending
4. Enable identification of highly accessed copies as candidates for "digitization FOR access"
5. Facilitate Controlled Digital Lending through resource sharing tools

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Updates from Working Groups: Infrastructure
Unique Materials Task Force

Have been meeting with vendors to discuss current capabilities of identifying unique and scarcely held materials across the Partnership.

Includes investigating 'emergency collection analysis' if a library is in danger of closing or withdrawing from a shared print program.

Have met with OCLC and Colorado Alliance, meetings planned with ExLibris and Index Data

Expect to report on findings this fall.

A larger Partnership group looking at defining'unique' and 'scarce' in the context of the Partnership.

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Updates from Working Groups: Infrastructure Metadata and Discovery Task Force

Investigate feasible approaches to integrating retention commitments within a program or across programs for discovery by individual participating libraries and their end users.

Ideas explored so far:

- CRL provides MARC records to members and/or or provides access through A-Z lists and discovery layers (Summon)
- WEST is in the process of providing MARC records to member libraries
- Partnership could create a collection in OCLC Collection Manager for export or discovery

Planning to meet with the following vendors:

- ExLibris
- OCLC
- Folio/Index Data

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Updates from Working Groups: Research and Network Level

Charge: *Investigates at scale activities including research, funding, and expanding shared print.*

Task Forces: Shared Print Toolkit, Value of Shared Print, Risk Research, Resource Sharing Research

Members: Ian Bogus (ReCap) Erin Engle (Library of Congress) Liz Hayden (Univ. of Ottawa) Aaron Krebeck (WRLC) Helen Levenson (Oakland Univ.) Mary Miller (Univ. of Minnesota) Matthew Revitt (Maine Shared Collections) Ben Treat (Bangor Public Library)

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Updates from Working Groups: Research and Network Level Shared Print Toolkit

Charge: *Develop a toolkit to support startup of new shared print programs for collections and in geographic locations that are not yet served. Analyze costs and determine necessary funding for shared print programs.*

Deliverables: Toolkit for both startup and existing programs. Will pull in work from other Partnership groups where overlap exists.

Subjects:
- Staffing and governance required for shared print;
- In-scope and out of scope materials;
- Sample retention criteria;
- Retention periods;
- Expanding shared print programs;
- Sample shared print agreements between consortia and programs;
- Commons pitfalls;
- Build trust, soft skills & change management;
- Registry/Directory of programs, both in North America and Internationally.

Members: Erin Engle, Liz Hayden, Matthew Revitt, Erika Dickey, Sara Amato

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Updates from Working Groups: Research and Network Level Risk Assessment

The Risk Research Working Group is working on the last few pieces for completing its agenda. Dr. Candace Yano has drafted a risk modeling tool that should be helpful in making recommendations about how many copies of an item needs to be retained. Some of the values of variables still need to be determined. The group is also drafting a paper on its study of bibliographic accuracy.

Members: Sara Amato (PSBOOK) Ian Bogus (ReCap) Fern Brody (Pitt) Helen Levenson (Oakland) Mary Miller (UMN) Jake Nadal (LC) Shannon Zachary (U Mich)

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Updates from Working Groups: Research and Network Level Value of Shared Print (ROI)

The ROI task force is moving into phase 2 of their work. We are creating data collection tools in the form of a number of surveys and interview questions for existing and prospective shared print practitioners. We are also developing an outline for our final report. The format will be similar to ARL's SPEC Kit 345 for shared print and is broad enough to encompass the report output from other groups as well if a combined effort is desirable.

Members: Aaron Krebeck, Susan Stearns, Marie Waltz, Ben Treat, Miranda Bennett, Charlotte M. Johnson

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Updates from Working Groups: Research and Network Level Resource Sharing Research

The Resource Sharing Research Working Group is starting to look into the impact that shared print has on resource sharing and use. As part of this research, the group expects to consider how shared print programs achieve discovery and delivery to understand the greater context.

Members: Ian Bogus (ReCap) Megan Gaffney (U Del) Heather Weltin (HathiTrust) Alison Wohlers (CDL)

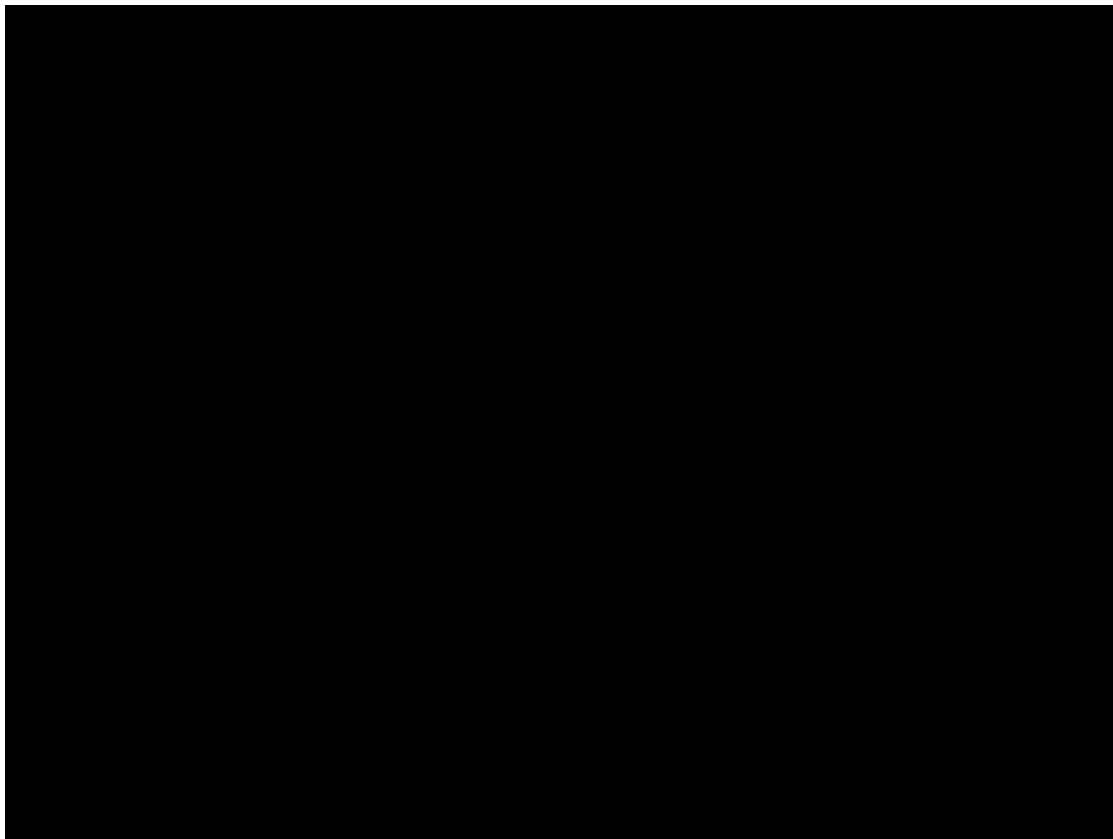PARTNERSHIP FOR SHARED BOOK COLLECTIONS

Questions?

Partnership for Shared Book Collections

During the break we'd like to thank those who have donated their time and expertise to the Partnership this year.

Welcome Back

EDI Discussion/PANEL

Jeanne Long
Executive Director of Chicago Collections

Michael Matos
Senior Collections Development Analyst, Library of Congress

Stephanie Smith
Collections Development Analyst, Library of Congress

Christopher Lowder,
Online Learning Assistant at George Mason University, VIVA

Alexis Antracoli
Asst. Univ. Librarian for Special Collections Technical Services, Princeton University

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Panel Questions

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Reminders

PAN Forum June 25, 2021

Partnership for Shared Book Collections

Thank You!

- Get involved:
  - Contact info@sharedprint.org and share your areas of interest
- sharedprint.org for more information including Best practises
- And stick around:
  - EC members will stay afterwards if you have any questions about the Partnership

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