Program Update

February 23, 2023
11 a.m. PT / Noon MT / 1 p.m. CT / 2 p.m. ET
Agenda

Introduction
Rosemont - Greg Eow, Chair of the Exec Committee
Partnership - Peg Seiden, Chair of the Exec Committee

Strategic Priorities and Key Projects

Program Updates from The Partnership Working Groups Chairs
- Best Practices - Tony Fonseca
- Infrastructure - Linda Wobbe
- Communications and Advocacy - Rebecca Lubas
- Research & Network Level - Mary Miller

Program Updates from The Rosemont Alliance - John Burger

Updates on the relationship between the Partnership and Rosemont - Daniel Dollar

Wrap-up/Conclusions
Big Ten Academic Alliance Shared Print Repository (CICBTAA-SPR)

Center for Research Libraries (CRL)

Eastern Academic Scholars' Trust (EAST)

Florida Academic Libraries Repository (FLARE)

Scholars Trust

Western Regional Storage Trust (WEST)
Partnership Strategic Priorities

1. Revisit the Partnership governance structure and organization and alignment of working groups and task forces.
2. Advance open shared print monograph retention data.
3. Work with member programs to develop strategies for ensuring retention of diverse and unique collections.
4. Investigate the relationship between digital surrogates and shared print retentions.
5. Investigate potential partnerships that can broaden the reach and impact of shared print.
6. Investigate potential partnerships that can broaden the reach and impact of shared print.
Partnership Working Groups - Best Practices

Members:

Sara Amato, Alison M. Armstrong, Glen Benedict, Kurt Blythe, Tony Fonseca (Co-Chair), Glenn Johnson-Grau, Kathie Mason, Sherri Michaels, Matthew Palvic, Amy Paulus, Heather Weltin (Co-Chair)
Partnership Working Groups - Best Practices

New Best Practices Created in 2022
- Collection Analysis
- Expiring Shared Print Commitments
- Geographic Distribution
- Moving Items to Storage
- Print to Digital Validation
- Succession Planning
- Shared Print Program Partnerships

Assessment Tool -

What’s Next? Best Practices for the Following:
Number of Copies, Community Building,
Controlled Digital Lending, and Weeding
Partnership Working Groups - Communications and Advocacy

Toolkit

Includes communications too!

Talking about weeding

ROI calculators

Updating wikipedia Collective Collections page
Partnership Working Groups - Infrastructure

Task Force Updates

**Discovery and Access** - This group continues to explore system possibilities in Ex Libris’s Alma (ILS) and Primo (discovery layer) for the discovery and access of retention commitments, along with library needs, and what current gaps could be filled. Recently welcoming 9 new members, their final report will be issued later this year.

**Matching Algorithms** - The group continues to meet bi-weekly and has begun comparisons of small sets of test records using the ReCAP and Gold Rush algorithms, along with an AI model from the California Digital Library. Ex Libris also expressed interest in running these test records through their algorithms for comparison.

**Resource Sharing** - Continues to meet with vendors on exploring the possibilities of surfacing shared print in resource sharing systems and understanding CDL workflows.
Partnership Working Groups - Research & Network Level

**Task Forces:**

**Resource Sharing**
- Working on their 2nd survey aimed at library practitioner

**Risk Research:**
- Finished Model Optimal Number of Copies Paper, working with other groups on operationalizing

**Shared Print Toolkit:**
- Comments welcome, content added as it becomes available

**Value of Shared Print:**
- Has begun to mount [calculators on sharedprint.org](http://calculators on sharedprint.org)

**Partnership Research Agenda**
Rosemont
Collection Size & Growth

Total Holdings by Program (November 2022)

- CRL: 52,252 (25%)
- WEST: 36,222 (17%)
- EAST: 36,887 (17%)
- FLARE: 43,668 (21%)
- Scholars Trust (ASERL/WRLC): 31,951 (15%)
- BTAA: 9,982 (5%)

Rosemont Total: 210,962
Rosemont Updates

- CCH Collaborations / Expressions of Interest
- Joint Communications & Advocacy Working Group
- Best Practices for Transfer of Retention Commitments
  - Review of PSBC’s Best Practices for serial use (list is recently updated with “M” and “S” indicators)
- Last Known Copy Initiative -- complete
- Focus on gap-filling, metadata best practices, access/usage
- Updating our Project Task List for 2023
- All eyes on potential merger between RSPA & PSBC
Exploring Strategic Consolidation

Investigate value and viability of merging:
- Already collaborating through joint meetings, events, and committees
- Reduce duplication of effort while maximizing effectiveness and efficiency
- Collectively articulate pros and cons
- Create decision-making criteria for what success looks like
- Use that criteria to evaluate two scenarios
  - Status quo (separate organizations that collaborate in specific areas)
  - Merge to create a consolidated organization
- Make recommendations regarding those alternatives
Deliverables

- Define desired goals
  - Should be independent of any recommended org structure
  - E.g., reduce workload, increase engagement, etc.

- Define assessment criteria

- Criteria must address potential harmony / misalignment in:
  - Vision & Mission
  - Governance Model
  - Business & Financial Model
  - Membership & Participation Model
Task Force Members

Rosemont Shared Print Alliance
- Michael Levine-Clark (University of Denver / WEST)
- Scott Warren (Syracuse University / EAST)
- John Burger (ASERL)
- Amy Wood (CRL)

Partnership for Shared Book Collections
- Daniel Dollar (Yale University / HathiTrust)
- Susan Stearns (EAST)
- Matthew Revitt (University of Maine / MSCC)
- Alison Wohlers (University of California Libraries)

ASPIRATIONAL TIMELINE: Final Report by December 2022!
Work to Date

- Eight Task Force Meetings so far
- Themes discussed:
  - best employ effective services for shared print retention?
  - achieve clarity of voice & impact within library community?
  - support the needed infrastructure?
  - align scope, goals, and a clear value proposition?
  - ensure sustainability of operations?
  - ensure parity of advocacy for the two formats (journals & books)?
- Gathered input from respective Operations Committee members via survey using assessment rubric.
Survey Results

1. Sufficient people to accomplish goals
   - Rosemont: +1.43
   - Partnership: +0.33

2. Sufficient assessment and communication capabilities
   - Rosemont: +1.14
   - Partnership: No change

3. Improves access to collections for member libraries
   - Rosemont: −0.29
   - Partnership: +0.17

4. Able to share information and build community
   - Rosemont: +0.14
   - Partnership: −0.33

5. Able to increase & diversify membership / participation
   - Rosemont: +0.43
   - Partnership: +0.17
6. Ability to grow the collections of retained materials

7. Ability to sustain operations into the future

8. Ability to expand operations into the future

9. Opportunities for membership growth

10. Sufficient capabilities for reporting and assessment

Survey Results

- Rosemont Alliance Current
- Partnership Current
- With Merger

<table>
<thead>
<tr>
<th>Question</th>
<th>Rosemont</th>
<th>Partnership</th>
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<tbody>
<tr>
<td>Ability to grow the collections of retained materials</td>
<td>-0.29</td>
<td>+0.17</td>
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<tr>
<td>Ability to sustain operations into the future</td>
<td>+0.71</td>
<td>+0.5</td>
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<tr>
<td>Ability to expand operations into the future</td>
<td>+0.86</td>
<td>+0.33</td>
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<td>Opportunities for membership growth</td>
<td>+0.29</td>
<td>-0.33</td>
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<tr>
<td>Sufficient capabilities for reporting and assessment</td>
<td>+0.43</td>
<td>+0.17</td>
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11. Capability to influence service provider developments
- Rosemont: +0.57
- Partnership: +0.33

12. Capacity to stay informed on service and technology changes
- Rosemont: No change
- Partnership: No change

13. Readily share information and build community
- Rosemont: −0.14
- Partnership: No change

14. Able to increase & diversify membership / participation
- Rosemont: No change
- Partnership: +0.83

15. Harmonize project schedules with other stakeholders
- Rosemont: −0.29
- Partnership: −0.33
16. Clear benefits and value for members and stakeholders

Rosemont: -0.29
Partnership: -0.33

17. Business model supports its strategy and operations

Rosemont: +0.57
Partnership: +0.17

18. Business model enables goal achievement

Rosemont: +0.71
Partnership: +0.33

19. Addresses format-specific needs in shared print

Rosemont: -0.57
Partnership: +0.33
Next Steps

• Meet with the Operations Committees to discuss findings and explore areas of concern with a merger

• Finalize recommendations for the Executive Committees

• Timeline for finalizing work late spring 2023
Thank you!
Thank You!

See you at our joint member meeting later this year

Interested in joining us?
info@sharedprint.org