



Partnership Assessment Survey Report

June 27, 2022

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Executive Summary

Evidence from the survey suggests that members see the need for the Partnership to continue its work and that the vast majority of programs will continue to be members beyond the initial three-year commitment.

Challenges mentioned in the responses include:

- Limited human resources for volunteers, along with a reliance on certain key people to serve on committees
- More opportunities to hear regular updates from working groups and task forces, and more inter-group communication
- Communications with program's member libraries
- Inability to analyze collections across programs without access to expensive collection analysis tools

Opportunities include:

- Collaboration with other organizations, including shared print programs outside North America and other organizations engaged in activities such as controlled digital lending
- Raise awareness of shared print at professional conferences and venues that haven't typically featured programs on shared print
- Addressing changes in leadership that may affect a program's prioritization of shared print
- Assisting small programs unable to pay for the membership fee
- Addressing what happens when a program reaches the end of retention commitments period

The survey results show the overall strength and success of the Partnership to date with the mission and vision remaining appropriate. While overall comments regarding governance and the frequency of meetings are positive, there is a need to be more deliberate in creating working groups and task forces that align with strategic initiatives. There was also overall support for continuing to investigate the relationship with Rosemont. It may be appropriate for the Executive

Committee to set strategic priorities annually to assist in this. Setting annual strategic priorities will also help achieve the [mission](#).

Introduction

From the outset, the Partnership planned to do an assessment in its third year to determine if the organization should continue, and if so are the current business model/structure still appropriate. A survey instrument was sent to voting members and to members of committees, working groups, and task forces to assess this.

Respondents:

- 37 of 73 responded (50% response rate)
- 14 of the 17 voting members
- 31 identified as being a member of a working group or task force
- Half of the respondents identified as being from member libraries, with the rest being from shared print programs and consortia.

Vision and Mission

Respondents either strongly agree (57%) and or agree (38%) that the vision statement is still appropriate.

Results regarding the validity of the mission are very similar to that of the vision statement, with 57% strongly agree, 35% agree, and 6% being neutral.

The comments regarding the achievement of the vision and mission are very positive, with many stating that the Partnership has made excellent progress, especially in coordinating collaboration, developing best practices, and raising awareness. Two examples:

- “The Partnership has made good progress in a challenging time for print collections.”
- “In my view, the Partnership has made effective progress towards achieving its vision and mission. Linking together programs, raising awareness about shared print at conferences, the website best practices, the collaboration with Rosemont and CCH are all good examples of effective progress.”

Partnership Membership

The voting members felt that the \$3,000 annual fee is reasonable. In response to the question, “would your program be willing to pay more to offset the membership for smaller programs”, there is no strong consensus. Comments reveal that more information is needed before a definitive answer can be given.

In response to the question, “what is the likelihood your organization will continue to be a member 3 years from now?” 86% responded likely and 14% responded unsure, citing changing leadership and shifting priorities.

Overall, the membership fee is considered appropriate and membership is important to the respondents.

Governance

Of the responses received regarding the amount of governance structure, 78% responded that the structure is effective, 11% responded that there is too much structure, and 11% were unsure. Two respondents commented on the number of working and task groups and the need to clearly scope their work.

Members from committees, working groups and task forces who responded regarding the statement “The number of meetings are appropriate to accomplish the charge for the Partnership groups you serve on”, the majority (68%) agreed with the statement, 16% strongly agreed, 13% were neutral, and 3% disagreed.

The feedback about serving on Partnership groups was very positive, with comments about the work being engaging and rewarding.

In the comments regarding governance, many remarked that the abundance of working groups and task forces makes it difficult to track all the work being done. Some respondents suggest that having fewer working groups and task groups, and tying them to specific strategic goals on an annual basis will be more effective and less complicated. There is also a concern about retaining and finding volunteers.

Communications

89% of respondents felt that the amount of communication to keep members informed was just right, 6% responded that there is too little communications, 3% felt somewhat disconnected from the Partnership, and 3% felt communication is just right, but would like to see it disseminated in a more centralized manner.

Some themes for improving communications from the comments section:

- Communicate more directly with Partnership member programs and their participating libraries, including more updates on the efforts of the working groups, when best practices are available or other major works, and outlining what the benefits of membership are. “With the hopes that this will inspire more people to get involved in shared print work.” And also encourage members to renew their membership after the initial 3 years is up.

- Consider engaging with dedicated communications professional staff to assist in the marketing and outreach components.
- Hold a second member meeting during the year as an opportunity to hear updates first hand.
- Increase outreach in other venues like “administrator conferences and general library press and conferences. Further suggestion of “a book of essentially case studies from a variety of institutions and include a wide variety of programs with: how we did it, what to watch for, and now, you can, too!”. The Shared Print Toolkit will hopefully address this commenters request.

Initial Services

Respondents were asked to rate the Partnership’s initial service for their importance to the community. The top three were:

1. Develop shared print best practices and guidelines.
2. Facilitate a process to analyze library monograph collections and identify unique or scarcely held materials.
3. Develop a Marketing/Communication toolkit to address needs related to shared print.

Respondents were asked to rate the Partnership’s initial service for their importance to their program. The top three were

1. Develop shared print best practices and guidelines.
2. Facilitate a process to analyze library monograph collections and identify unique or scarcely held materials.
3. Investigate the development of more robust and flexible matching algorithms.

Potential Partnerships

Eighty-seven percent of the responses were in favor of exploring more collaboration with Rosemont, with five unsure. The comments were also generally in favor of a potential merger, but there were concerns about reconciling the differences between the organizations including governance, membership, and between shared print for journals and monographs including “how to keep the significant challenges faced by the monograph programs from being subsumed in [by] the long-standing serials program if the two were to join?” But on the other hand, “how can the monograph programs make any progress on multi-part monographic series without the expertise and methodologies of the serials experts?”.

Some suggestions for potential partnerships included with the Internet Archive, open access communities and advocacy organizations like Library Futures, and shared print programs outside of the U.S. and Canada.

Themes

Comments from the survey highlight the following themes:

- The need for an open retention database;
- support for merging with Rosemont;
- expanding the mission to include other formats;
- the desire to have fewer working groups and task forces;
- and extending the Partnership to membership outside of the U.S. and Canada.

Conclusion

Evidence from the survey suggests that members see the need for the Partnership to continue its work and that the vast majority of programs will continue to be members beyond the initial three-year commitment. One of the challenges the Partnership faces is limited human resources for volunteers along with a reliance on certain key people to serve on committees. Perhaps if the Partnership and Rosemont combine forces, this will become a challenge that can be overcome.

In the area of communications, there is a request for more opportunities to hear regular updates from working groups and task forces. In line with this is a need for inter-group communication and directly to member libraries in programs.

A remaining challenge from our [list of initial services](#) is the inability to analyze collections across programs without access to expensive collection analysis tools. The [research agenda](#) also touches on being able to understand the corpus of materials to be retained, for which we are still lacking sufficient data and resources.

Challenges that are mentioned which the Partnership may wish to focus attention on include changes in leadership that may affect a program's prioritization of shared print, assisting small programs unable to pay for the membership fee, and what happens when a program reaches the end of retention commitments period.

Another opportunity is potential collaboration with other organizations, including shared print programs outside North America and other organizations engaged in activities such as controlled digital lending. Additionally, there are further opportunities to raise awareness of shared print at professional conferences and venues that haven't typically featured programs on shared print.

In the first two years, the Partnership has successfully launched a website, held member meetings, developed best practices and a shared print toolkit, begun work on a research agenda, developed a risk model, presented at PAN and other venues, and hired a program coordinator (thank you, Sara), to name some activities. While there are numerous groups accomplishing the work, it is evident that much work has been done—and done well!