



# Western Regional Storage Trust

## **WEST Member Meeting**

July 29, 2021

12:30-2:00 pm PT

# Meeting Roadmap



- ❖ Brief WEST Refresher
- ❖ *Lessons from Library Collaborations* - guest speaker  
Roger Schonfeld
- ❖ Select Program Updates
  - New WEST Vision, Mission, and Guiding Principles
  - New WEST Systems Developments
- ❖ Closing Remarks



# Brief WEST Refresher

# WEST Refresher - What we do



Collaborate across the western regional United States to build a shared, retrospective print collection of journals.

## Our objectives:

- Preserve the scholarly print record through distributed retention commitments and targeted consolidation of journal holdings
- Provide access to retained materials
- Create opportunities to reallocate library space

**Together, WEST members are retaining and providing access to over 830,000 volumes across over 32,000 unique titles.**

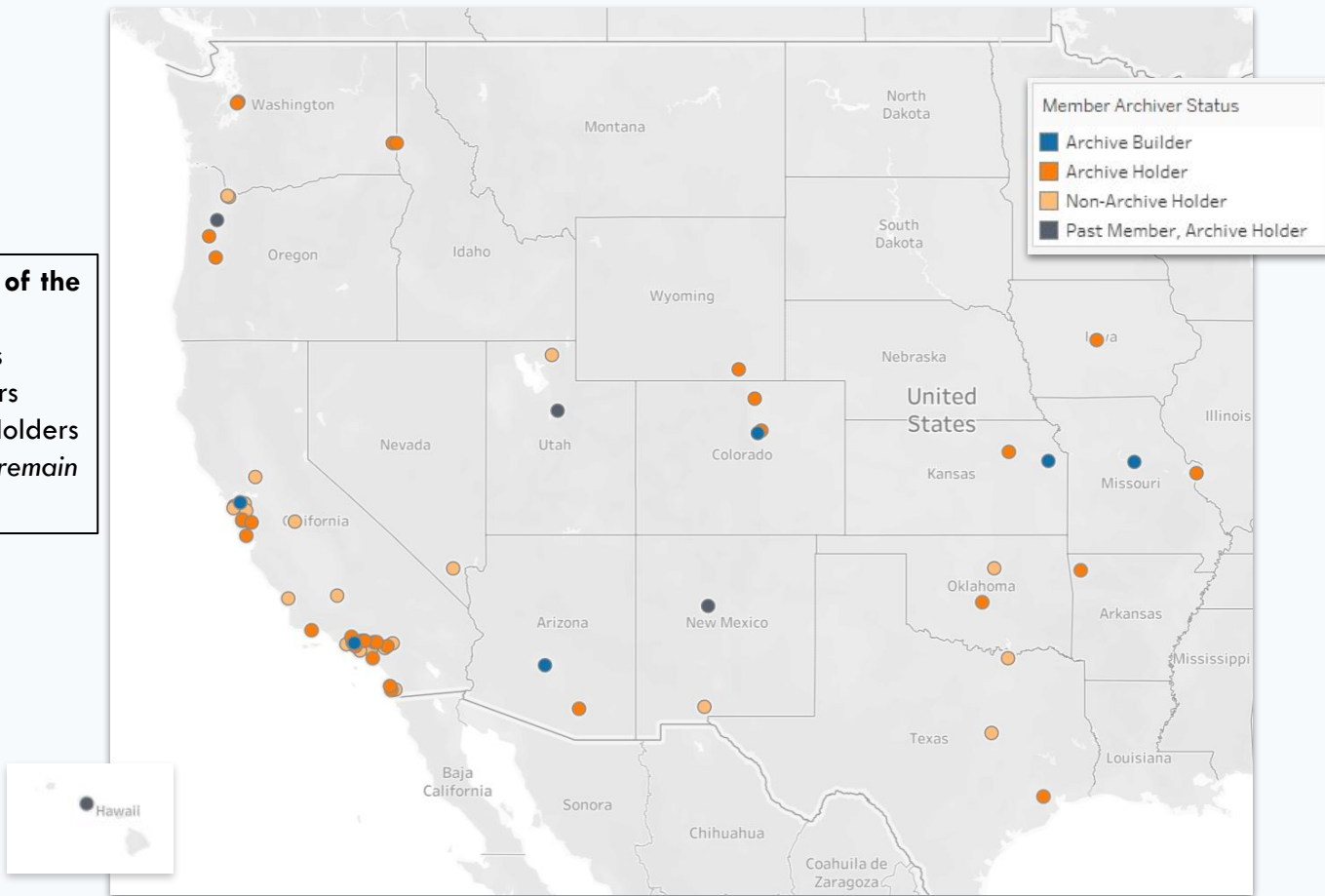
# WEST Refresher - How we do it

- ❖ **Analyze** our collective serial holdings 
- ❖ **Target our effort and resources** based on risk for loss of content
- ❖ Explicitly **record** the retentions and **disclose** them through public registries
- ❖ Provide tools for **local decision-making and comparison**
- ❖ **Collaborate** with the wider community 

# WEST Refresher - Who we are

## 65 institutions west of the Mississippi

- 6 Archive Builders
  - 34 Archive Holders
  - 25 Non-Archive Holders
- 6 Past members who remain Archive Holders*



# Lessons from Library Collaborations

## **Roger Schonfeld**

Program Director, Libraries, Scholarly Communication, and Museums  
at Ithaka S+R

## **Introduction from Dena Hutto**

Norman F. Carrigg College Librarian, Reed College  
Chair, WEST Executive Committee

*Public Discussion & Question Document:* <https://tinyurl.com/79m5cdvk>

See *meeting recording for presenter slides:*  
<https://vimeo.com/583058124>



## Q&A

Ask a question or make a comment!

- Unmute
- Chat
- Public discussion document -  
<https://tinyurl.com/79m5cdvk>



# Select Program Updates



# **New WEST Vision, Mission, and Guiding Principles**

**Michael Levine-Clark**

Dean, University of Denver Libraries

WEST Executive Committee

# Why?

Articulate a foundation to guide:

- ❖ program evaluation
- ❖ strategic expansion or changes in services, scope, and membership
- ❖ cooperation with other organizations

# With thanks to the Core Drafting Group



Executive Reps

Melissa Desantis, Strauss Health Sciences  
Library, University of Colorado  
Michael Levine-Clark, University of Denver

OCC Reps

Jill Emery, Portland State University  
Molly Strothmann, Oklahoma State University

Program Support

Alison Wohlers, WEST

# Vision & Mission

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**Vision:** Reliable, innovative and lasting preservation to ensure ready availability of the print scholarly record through a distributed network of committed and trusted partners sharing responsibility, stewardship, and decision-making.

**Mission:** To collaboratively develop, manage and coordinate the identification, retention, registration, discovery of, and access to a shared, distributed collection of print content across libraries.

# Guiding Principles

- **Shared Responsibility and Stewardship**

*Our top priority is preserving and making accessible the scholarly record both for our members, and also for the greater good.*

- **Trust and Transparency**

*Our work is built on a foundation of trust among libraries, supported by complete and accessible documentation and exceptional communication with member libraries.*

- **Inclusion and Diversity**

*We value diversity and inclusivity in our collaboration. We invite participation from the broadest range of libraries and individuals possible to meet our mission. We are committed to preserving a collective collection that represents the diversity of the communities we serve.*

# Guiding Principles, continued

- **Equity**

*We are committed to pursuing equitable models in stewarding the collective collection - from selection, to discoverability, to access, to governance.*

- **Collaboration**

*We welcome partnerships with organizations that have a similar mission to preserve the scholarly record.*

- **Sustainability and Resilience**

*We recognize that librarianship is a dynamic and ever-changing landscape. We commit to anticipating change, adapting to new needs, and expanding the range of WEST members and communities we serve.*

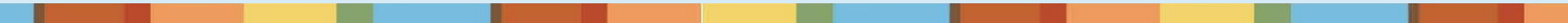


# Next steps

## Member feedback

- ❖ Open comment period: July 30 - September 30
- ❖ Drop in hours with members of the core drafting group, if desired
- ❖ Membership-wide vote will be administered in the late fall (in combination with WEST Executive Elections for 2022)

**Questions?**





# **New WEST Systems Developments**

**Anna Striker**

Shared Print Operations and Collections Analyst, WEST

# AGUA Enhancements



## AGUA Development Phase 5

- ❖ Biennial systems development periods alternate with collections analysis
- ❖ Prioritized foundational and innovative enhancements
- ❖ Improve analytical capabilities and provide value to members

# AGUA Enhancements

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- ❖ Local Discovery of WEST Archived Collections
- ❖ Collection Comparison Capabilities
- ❖ Metadata Validation and Reporting

# Local Discovery of WEST Archived Collections

- ❖ **Goal:** Facilitate discovery of distributed shared collections by local users
  - Connect local users to the broader WEST collections
  - Demonstrate continued availability of titles deaccessioned locally
  - Immediate comparison of local holdings against WEST archives
- ❖ **First iteration:** MARC file now available in AGUA!
- ❖ **Future work:** With peer programs, participate in discussions with vendors to develop better native support for shared print

Western Regional Storage Trust | AGUA

AboutAnna Striker

Welcome to AGUA

WEST Updates

Welcome to AGUA! AGUA is a web based analysis and decision support system that facilitates shared print collaborative activities and local collection management. If you've visited AGUA before, you'll notice we've had a bit of a refresh to the interface, although the underlying functionality remains the same. We hope you enjoy the visual updates! Please send any questions or comments to [WEST Support Team](#).

Functions

Upload Bibliographic and Holdings Data

- Upload Your File
- Set Storage Location and Exclusion Flags

Reports and Downloads

Collection Downloads

- All Titles Archived by WEST Report
- All Titles MARC File

Collection Comparison

- Collection Comparison Reports
- On Demand Comparison Report


Contacts

Contact WEST Staff

Institution Contact Roster

## All Titles MARC File

Downloadable file now available on the AGUA dashboard


**LIBRARIES**  
 MOUNT SAINT MARY'S UNIVERSITY

[New Search](#)
[Print](#)
[Help](#)
[Login](#)

[My Library](#)
[Help Topics](#)
[Features](#)

[Request](#)
[Add to My Lists](#)
[Add to Bag](#)
[MARC Display](#)

RECORD #

☐ Limit search to available items

 **Book Cover**

**Title** Computer graphics marketplace.  
**Imprint** Phoenix, Ariz. : Oryx Press, 1-  
**Connect to**  
**WEST Program Statement**  
**WEST** Archived title; Not available for immediate access. Request from InterLibrary Loan

 **Periodical**

**Copies**

**Descript** volumes ; 28 cm  
**Frequency** Annual  
**Pub Date** 1981-  
**Subject** Computer graphics -- Periodicals.  
**ISSN** 0278-2774

**Resources**  
[More Information](#)  


 [Permanent Link](#)

## Local Discovery of WEST Archives

Example catalog record after loading MARC records for WEST archived collections



# Collection Comparison Capabilities

- ❖ Expanded On Demand Collection Comparison capabilities
  - Archived titles comparison
  - Unarchived titles report
  - Not Held in WEST

Functions	Reports and Downloads	Contacts
Upload Bibliographic and Holdings Data	Collection Downloads	<a href="#">Contact WEST Staff</a>
<ul style="list-style-type: none"><li>• Upload Your File</li></ul>	<ul style="list-style-type: none"><li>• All Titles Archived by WEST Report <a href="#">↓</a></li></ul>	Institution Contact Roster
<ul style="list-style-type: none"><li>• Set Storage Location and Exclusion Flags</li></ul>	<ul style="list-style-type: none"><li>• All Titles MARC File <a href="#">↓</a></li></ul>	
	Collection Comparison	
	<ul style="list-style-type: none"><li>• Collection Comparison Reports</li></ul>	
	<ul style="list-style-type: none"><li>• On Demand Comparison Report</li></ul>	
	Archiving Reports	

# Collection Comparison Capabilities



## Archived titles

1. New 'completeness' calculation (how much of the published run does the retained holdings cover?)
2. New 'Rosemont Archived' field for quick identification (flag if the program is a Rosemont partner)

				1		2	
Archived OCLC Number	Archived ISSN	Archived Holdings	Completeness Validation	Condition Validation	Estimated % of Title Archived	Archiving Program	Rosemont Archived
1205158	0004-8658	1(1968)-38(2005)			70.37	WEST, WEST Bronze	
	0004-8658	2002-2010				PORTICO	
	0004-8658	v.43-v.47 (2010-2014)				CLOCKSS	
	0770-2965	v.27:no.5-v.63:no.3 (Sep,				HARV@JSTOR	
1205196	0770-2965	v.29-v.39 (1976-1986)	Missing:Missing v.34, no.5		25	CRLSerials	
1205196	0770-2965	v.28(1975)-v.32(1979); Ir			11.36	Scholars Trust, FLARE	Y
1205196	0770-2965	35(1982)-58(2005)	missing volumes:missing v.27-		54.55	WEST, WEST Gold	
1208048	0024-1415	v.1 (1947)-v.54 (2000)			72	EAST	Y
1208048	0024-1415	v.1-v.70(1947-2016)			93.33	EAST	Y
1208048	0024-1415	t.1(1947)-t.17(1963), t.21			44	Scholars Trust, FLARE	Y
1208048	0024-1415	v.1 (1947)-v.68,no.3-4 (2			90.67	Scholars Trust, WRLC	Y
1208048	0024-1415	v.1(1947)-v.74(2020)			98.67	WEST, WEST Bronze	

# Collection Comparison Capabilities

## ❖ Unarchived titles

### ➤ WEST holdings for titles not yet retained

1. 'Completeness' calculation (how much of the published run do the unarchived holdings cover?)
2. Count of OCLC institutions (global count of OCLC holdings)

WEST Holding Institution	Title	OCLC Number	ISSN	Institution Holdings Statement	Estimated Volumes	% of Published Run Held at WEST Institution	Duplication in WEST	Count of OCLC Institutions
WAU	YÄ±llÄ±k / T.D.İ	4264420		1943/1944-194	4	100	4	16
ZAP	YÄ±llÄ±k / T.D.İ	4264420		1943-46	4	100	4	16
CLU	The quarterly o	4412219	0163-5565	v.20-39(1961/2	21	80.77	5	59
COU	The quarterly o	4412219	0163-5565	26-36, v.30,197	12	46.15	5	59
CUN	The quarterly o	4412219	0163-5565	v.22(1963)-v.40	19	73.08	5	59
CUX	The quarterly o	4412219	0163-5565	v.32-39(1973-1	9	34.62	5	59
WAU	The quarterly o	4412219	0163-5565	28, 29-35, 36, 3	12	46.15	5	59
WAU	Bulletin of the N	5212270	0163-5565	5, 6-10, 11, 12,	8	42.11	1	28
AZS	Semiosis.	5453520		no.1(1978)-24(	13	29.55	5	37

# Metadata Validation and Reporting

- ❖ New metadata validation processes
  - Developed by CRL
  - Streamlines and accelerates WEST analysis
  - Generates detailed reports, provided back to members

# Thank you to our testers!

## Member Testers

### Discovery

- ❖ Erika Dickey, KU
- ❖ Shari Laster, ASU
- ❖ Samantha Silver, MSMU

### Collection Comparison

- ❖ Sion Romaine, UW

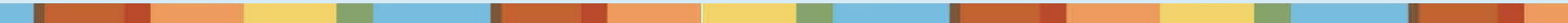
### Metadata Validation Reporting

- ❖ Debra Spidal, WSU

## AGUA Development Team

- ❖ Dana Jemison
- ❖ Jing Jiang
- ❖ Lucy Liu
- ❖ Judy Dobry

**Questions?**





## Closing Remarks

## WEST Executive Committee

<b>Dena Hutto (2021 Chair )</b>	Reed College
<b>Melissa Desantis (2021 Vice Chair)</b>	University of Colorado Anschutz Medical Campus
<b>Mark Roosa</b>	Pepperdine University
<b>John Wenzler</b>	CSU East Bay
<b>Virginia (Ginny) Steel</b>	UC Los Angeles
<b>Michael Levine Clark</b>	University of Denver
<b>Denise Stephens</b>	University of Oklahoma
<b>Kathleen Salomon</b>	Getty Research Institute
<b>Ellen Finnie</b>	CDL Administrative Host

## WEST Operations and Collections Council

<b>Sion Romaine</b>	University of Washington
<b>Jack Maness</b>	University of Denver
<b>Laura Turner</b>	University of San Diego
<b>Molly Strothmann</b>	Oklahoma State University
<b>Jill Emery</b>	Portland State University
<b>Shari Laster</b>	Arizona State University
<b>Mary Grenci</b>	University of Oregon
<b>Nancy Lorimer</b>	Stanford University
<b>Cathy Martyniak</b>	SRLF
<b>Kerry Scott</b>	UCSC
<b>Kerri Goergen-Doll</b>	Oregon State University



# WEST Working Groups

## Disclosure & Validation Standards

**Anna Striker**, WEST project team  
**Cathy Martyniak**, UC Southern Regional Library Facility  
**Corrie Hutchinson**, University of Missouri  
**Debra Spidal**, Washington State University  
**Tim Converse**, UC Northern Regional Library Facility

### Complete

- 2nd Symbol Recommendation
- Updated WEST Disclosure Policy

### Upcoming

- WEST Validation Standards

## Non-journal Formats

**Alison Wohlers**, WEST project team  
**Cass Kvenild**, University of Wyoming  
**John Wenzler**, CSU East Bay  
**Kerry Scott**, UC Santa Cruz  
**Michael Brewer**, University of Arizona  
**Shari Laster**, Arizona State University  
**Joel Thornton**, University of Arkansas, Fayetteville

### Complete

- Environmental scan and impact/readiness assessment
- Refined proposals for 4 areas
- Input from OCC

### In progress

- Consult with potential collaborative partners

### Upcoming

- Exec review
- Member engagement

## Resource Sharing

**Alison Wohlers**, WEST project team  
**Anna Striker**, WEST project team  
**John de La Fontaine**, Occidental College  
**Tim Converse**, UC Northern Regional Library Facility  
**Debra Spidal**, Washington State University (*former member*)

### Complete

- 2nd Symbol Recommendation

### In progress

- WEST Access Policy
- Borrowing and Lending Instructions



# Thank you!

Please stay in touch with your questions and feedback.

<https://cdlib.org/west/>

**Alison Wohlers**, WEST Program Manager

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**Anna Striker**, WEST Operations and Collections Analyst

[anna.striker@ucop.edu](mailto:anna.striker@ucop.edu)