Updates from Print Archives at ALA Midwinter 2013

Reports shared with PAN by print archiving programs from around the country

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Maine Shared Collections Strategy’s Interim Performance Report

**Project Goals**

1. To develop a strategy for a state-wide, multi type library program for managing, storing and preserving print collections among public and private institutions to achieve greater efficiencies and extend the power of every dollar invested in collections and library facilities.
2. To expand access to existing digital book collections by developing print-on-demand (POD) and e-book-on-demand (EOD) services to support long-term management of a shared print collection, and the integration of digital resources with print collections.
3. To formalize organizational agreements, establish a budget, and develop policies essential for the maintenance of shared print and digital collections, access to them, and responsibility for sharing them.

To realize these goals the following activities have been undertaken:

**Collection and use analysis of print collection**

**OCLC reclamation**

Although not part of the original project plan, it quickly became clear that in order to accurately compare holding and circulation data among the partners and to WorldCat that an OCLC reclamation project was needed. Seven of the eight partner libraries were required to send monograph and serial records at a minimum, for reclamation; some libraries elected to send records for additional formats not covered as part of the grant. Portland Public Library had completed a reclamation in 2009 and has continued to maintain its holdings, so it was exempt from this requirement.

OCLC was contacted in late September 2011 with preliminary reclamation inquiries, and a reclamation order for URSUS libraries (including four participating grant libraries as well as others not part of the grant) was submitted November 17, 2011. 2,080,299 monographic records and 20,000 serial records were sent November 25 – 28, 2011. The records were run by OCLC on December 24 – 28, 2011. The live scan/delete process for all URSUS schools was run between March 12 and 16, 2012.

Colby, Bates, and Bowdoin (CBB) completed the reclamation individually. By March 20, 2012, processes were completed for Bates and Colby. Bowdoin did not have their live scan/delete run until March 30th, which may have been after the start of the WorldCat Collection Analysis (WCA) scan. Combined, the three sent roughly 1,748,483 records.

As expected, the reclamation project exposed problems in the local catalogs; for example, records with no 001 fields, ISSN in the 001, etc. The process of identifying which records should be included was quite involved. Discussions included formats, record types, trying to identify ways to grab 'legitimate' records with no 001s vs. brief records, e-books, etc. System issues with the shared URSUS system required the export of checkin record information get the local library location. The solution required exporting serials records multiple times, once for each accounting unit.

The reclamation process involved evaluating records returned as 'unresolved', i.e. unmatched, by OCLC. Bowdoin had a high percentage of records that should have matched existing OCLC records that came back as unresolved. OCLC determined that it was an error on their end due to high volume traffic at the time their records were run. OCLC re-ran the records and corrected the problem.

Reloading matching records from the reclamation into the local systems brought to light what has now been labeled a bug in the ILS software. The MARC record leader is sometimes altered in unacceptable ways during the reload. Unfortunately, we have been unable to consistently reproduce the problem, so it has been difficult for Innovative Interfaces, Inc. (III), our ILS vendor, to address it. They provided a workaround involving loading and reloading records with separate load tables, which, while tedious, does work. OCLC was not always as responsive...
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and timely in processing records as we would have hoped. However, when they eventually addressed our issues they were very helpful.

Though a more involved process than originally thought, the reclamation work facilitated the use of a collection analysis system and cleaned up libraries’ records.

WorldCat Knowledge Base
In February and March 2012 the Technical Services Subcommittee explored the WorldCat Knowledge Base as an alternative to loading records for owned or licensed e-resources. After much investigation and a question & answer session with OCLC project managers, it was decided that the Knowledge Base was not a viable tool for this project.

WorldCat Collection Analysis (WCA)
After researching existing collection analysis products, taking stock of the current environment, and contemplating the uncertainty of future development resources, the Project Team decided not to develop a local collection analysis system. In November 2011 a group subscription to OCLC’s WorldCat Collection Analysis (WCA) was chosen as an initial solution. The Project Team also began discussions with OCLC regarding the development of a new analytics product. We have sent them detailed information regarding the data we would want to upload into the system, the data we would want to export, and examples of reports integral to a complete collection analysis for our purposes.

Because of limitations of the existing WCA product and the discovered need for partner libraries to undergo reclamation of their catalogs, access to accurate data for the group has been limited. Post-reclamation data for most partner libraries only became available in WCA in September 2012. Based on the Project Team’s collections analysis criteria, the MSCS Systems Librarian has manipulated the data to facilitate the collections analysis work which underpins so much of this project. This work was completed at the beginning of November 2012. It is hoped that we will soon begin reviewing unique items (unique to the group; unique to WorldCat) and begin testing the application of retention-related metadata and determining a policy for the preservation of those items.

As a result of repeated delays in the development of the next-generation WCA as of October 2012, the Project Team is beginning to investigate other collections analysis tools and services not considered initially.

Collections analysis criteria
The Collection Management Subcommittee began meeting in November 2011 and has been wrestling with several collection analysis issues. Some test reports have been run from individual systems, based on various criteria (e.g., call number ranges “QH” and “S7*”). This has allowed us to review sample data for evaluation purposes, and also to identify some coding inconsistencies across the group. Broader issues being discussed with regard to retention decisions include circulation statistics (e.g. what constitutes poor vs. good usage); minimum number of retention copies per title for the state; impact of library subject area strengths; existing and planned library storage facilities within the state; HathiTrust in-copyright and public domain titles’ overlap with our holdings; uniqueness (in OCLC; in-state); differing collection types and thus expectations of the project for public and academic institutions.

OCLC circulation data report
OCLC were contracted to export data elements (both local item information and bibliographic data) for analysis. This included exporting the symbol of the holding library if in the Maine Shared Collections Strategy (MSCS) project and the number of holding libraries in OCLC overall, for each title. The following item-level data elements were requested to be pulled:

- Item Record Number
- Total checkouts
- Last checkin date
• Location
• Status
• Internal Use
• Renewals

The data was provided to MSCS in August 2012.

Print/digital management model
There has been some discussion about the integration of public domain titles into systems, the majority of which has surrounded HathiTrust. Membership has been explored by Colby College and the University of Maine; however neither library has joined due to lack of Shibboleth implementation. The University of Maine (Orono) implementation of Summon has been configured to provide access to public domain items available in HathiTrust; it has been expressed that no one wants to load these nearly 3 million records into MaineCat, the INNREACH catalog shared by the grant participants. At this time it is unclear how the MSCS POD solution would interact with HathiTrust POD availability (via UC and UMich). The MSCS System Librarian has used the HathiTrust API to compare our holdings (including item-level data) to HathiTrust availability.

Service delivery model including POD and EOD
Based on a higher than expected price quote, as well as feedback from two academic libraries with installations, the Project Team decided in spring 2011 NOT to purchase an Espresso Book Machine (EBM) and accompanying service contract. Other avenues that have been explored include:

• University of Maine’s Printing Services Unit
• Booksurge / CreateSpace (Amazon)
• TextStream (Baker and Taylor)
• Lightning Source (Ingram)
• Two EBM hosts were contacted: Harvard Bookstore and Darien Library (CT)
• Other university print-on-demand initiatives were researched (including: UC reprints; Cornell; UMich reprints; Western Ontario Libraries)
• Widespread availability of inexpensive, commercially printed public domain titles

A book was successfully produced using the University of Maine’s Printing Services. The Project Team intends to test the demand for POD using the University of Maine’s Printing Services.

Methods to make patrons aware of the availability of POD and EOD options are ongoing. Innovative’s INNREACH system, the shared discovery catalog that includes the holdings of the eight partners from five local catalogs, unfortunately appears not to be useable for display of EOD and POD options due to the way in which the bibliographic records and holdings statements are entered and displayed. Some of the partners have already implemented links in their local catalogs to EOD services such as HathiTrust. Bowdoin provides links to full-text public domain in HathiTrust with print titles in their catalog. Bates provides links to Google Books and Project Gutenberg. However, a centralized, shared solution to providing EOD and POD links for Maine has not yet been found or built. GIST, a toolkit that works within ILLiad to provide EOD, POD, and purchase options in addition to interlibrary loan, was investigated, but is not a solution that provides point of service in a discovery catalog.

Collection management, stewardship, and preservation model
The MSCS Collections Development Committee has extensively discussed the selection criteria for print titles that should be retained, managed and preserved, as well as titles that could be de-accessioned due to availability and/or preservation in a large-scale digital collection. However, due to the longer-than-expected reclamation process, and the inability to get the type of data reports needed from WCA, no data has yet been compiled in such a way that final decisions can be made on retention, preservation, and digital substitutions.
The MSCS Project Team has analyzed different shared print models including the role of a last copy center (or “shared print facility”). The consensus so far has been to use a "print-in-place," distributed (rather than centralized) model where the holding library would still be the "owner" of the retained items. Although, no business model to support this work has been agreed upon the MOU (see below for more detail) has begun to address this in management level terms.

The Project Team has closely followed the activities of the OCLC Print Archives Disclosure Pilot. The OCLC Pilot and other similar projects have seen the emergence of the MARC Subfield 583 as the standard for documenting preservation, retention, completeness, and condition.

The MSCS Technical Services Committee and the 583 Subcommittee have begun testing the use of the 583 and 852 metadata fields in our local system’s holdings records. Issues encountered so far are with display and transfer to the central union catalog. The Committees are currently exploring various options with OCLC and ILL for exporting this data to WorldCat Local Holdings Records, working with a small set of test records. It hopes to have clear procedures in place by the time the collection analysis decisions are ready for implementation.

OCLC recommended that a separate Shared Print Symbol is necessary for WorldCat display for the foreseeable future. We are currently in the process of requesting Shared Print Symbols from OCLC and have started to test the Interlibrary Loan implications of the Shared Print Symbol.

**Website creation**

Rainstorm Consulting, a firm specializing in the design of public information websites, was hired to design a website that communicates MSCS to the library community as well as providing a robust workspace for project participants. The website went live in December 2011 and includes searchable meeting summaries, an embedded project calendar, and an associated Gmail account. The website has been linked to on the Maine InfoNet website and sent to various discussion lists. Google Analytics is used to monitor visits.

MSCS has a presence on Twitter where project updates are tweeted. The website SlideShare is used to post MSCS presentations, with links to them on the MSCS website.

- Website: http://www.maineinfonet.net/mscs/
- Twitter: @MEsharedcolls
- Gmail: mainesharedcollections@gmail.com
- Slideshare: http://www.slideshare.net/Maine_SharedCollections

**Presentations/Outreach**

In additional to attending 2012 American Library Association Conference in Dallas and Anaheim, MSCS Project Team members:

- Presented an overview of the project at the Maine Library Association conference in Portland; October 29, 2011.
- Presented at the Shared Print Pre-Conference Session, Charleston Conference, November 2, 2011.
- Presented at the Maine Library Association Conference, October 29, 2011.
- Presented an overview of the project at the University of Maine Staff Development Day, January 3, 2012.
- Presented an overview of large-scale digital initiatives for employees of partner institutions; Colby College, February 24, 2012.
- Presented an overview of the project at University of Southern Maine staff meeting, March 15, 2012.
- Presented at Shared Print Pre-Conference Session, Charleston Conference, November 14, 2012.
MSCS Project Team members also intend to submit papers for presentation at future conferences including the ALA 2013 Conference in Chicago.

**Business model**
The grant timeline indicated that governance would be discussed during project year 3. However, the Project Team at the recommendation of our Board decided to move it into year two as they began investigating business and financial models for print-on-demand and shared storage. These discussions resulted in the drafting of a Memorandum of Understanding (MOU).

The MOU provides a mechanism by which the materials designated under the agreement will be retained and made available to participating institutions and the residents of Maine as long as the need for them exists, thereby allowing participating libraries to consider withdrawing duplicates of these items from their respective collections and to rely with confidence on access to the retained copies.

A final draft of the Memorandum of Understanding has been produced and will be presented for approval at the December 2012 Directors Council. Once approved, the MOU will be forwarded to be signed by an institutional representative (rather than the library’s director), for example a Board of Trustees or Provost.

**Budget**
The decision to not purchase an Espresso Book Machine (EBM) required MSCS to produce a budget change justification document which will be submitted to IMLS in December 2012. The original goal was to have the revised budget completed by September 2012, but the departure of the Program Manager (see below) delayed this work.

**Project Timeline**
The grant completion date was extended until May 2014 because the Project Team was unable to find and hire an acceptable candidate for program manager in time for the original start date.

**Personnel changes**
In August 2012 the MSCS Program Manager departed after 14 months resulting in an increased workload for Project PI’s. The University of Maine’s Fogler Library Dean and the Human Resources Department worked together to help the MSCS Project Team fill the position, effecting an efficient transition to a new Program Manager in September 2012.

**Advisory Board Committee Visit**
In addition to completing 6 months reviews, the MSCS Advisory Board (who are three individuals with nationally recognized expertise in shared collection development and print storage and preservation) visited on May 21, 2012. As well as attending MSCS meetings, they also presented at the 2012 Maine Libraries Association Conference, University of Maine.
Beginning in the fall of 2012, ConnectNY (CNY) has been working with library consultant Sam Demas to develop a strategic approach to shared print archiving for the group. We are currently working on a Memorandum of Understanding for the CNY Shared Print Trust. We are also working with SCS to develop collection management scenarios based upon the data provided by SCS.

CNY (ConnectNY) Inc. now includes 18 academic libraries in NY State sharing approximately 9 million volumes through an Inn-Reach system hosted by Innovative Interfaces, Inc. CNY focuses on both collection development and collection management and recent initiatives include a patron-driven e-book acquisition program funded from a 1% acquisition fee formula agreed to by the group and a print archiving initiative that is focused on the monograph collections held in common and accessed through the union catalog system.

The ConnectNY (CNY) Shared Print Trust (aka “the Trust”) is a new initiative that will be framed by an MOU agreed to by the group and also driven by a collection analysis program developed with the assistance of Sustainable Collection Services (SCS), a company focused on assisting libraries in strategically managing their monograph collections. The purpose and overarching goal of the CNY Shared Print Trust is to provide new options for sharing the costs and effort of long-term retention of low use library materials. This Memorandum of Understanding (MOU) provides a cooperative framework by which materials will be retained and made available as long as the need for them exists, thereby allowing members to consider withdrawing duplicates of those items from their campus collections and to rely with confidence on access to and preservation of the Trust copies. The Trust is to be a distributed retrospective print repository in which participants agree to retain monographs, journal back-files, and/or other materials on behalf of the CNY membership. Subsidiary goals of the Trust are:

- Exploring the use of trusted digital surrogates as a part of the collective strategy for cost-effective shared print archiving;
- Building on CNY’s effective service program for speedy delivery of print originals when needed;
- Extending CNY as a sustainable trust network that guarantees each member will uphold its archiving commitments;
- Developing and implementing policies, procedures, criteria, and projects to these ends; and
- Potentially positioning CNY to participate in regional and national shared print archiving programs to ensure that a “national collection” is preserved in service to scholarship.

Initial phases of the Trust will focus proactively on shared archiving of circulating print monographs.

CNY has also contracted with SCS to develop a collections database that will allow the group to systematically analyze the book collections held in common with a view toward providing “actionable collection analysis”, more specifically, to increase the reliance on the collective CNY collection while allowing libraries to withdraw copies of titles that are held in sufficient numbers by other consortial partners. In the Spring of 2013, CNY will meet with SCS to develop collection management scenarios based upon the data provided by SCS.
Update on Florida Academic Repository (FLARE), the statewide shared academic print collection

The Florida Academic Repository (FLARE) is the statewide shared collection of low use print materials from academic libraries in Florida. By establishing this centrally housed collection, the Council of State University Libraries (CSUL) provides new options for sharing the costs and effort of long term retention of low use library materials. Under the FLARE memorandum of understanding, the materials designated under this agreement will be retained and made available as long as the need for them exists, thereby allowing participants to consider withdrawing duplicates of these items from their campus collections and to rely with confidence on access to the centrally retained copies. Eventually FLARE will be housed in an environmentally controlled, carefully inventoried and secure high density facility (HDF) located in Gainesville, operated by the George A. Smathers Libraries at the University of Florida (UF) on behalf of the participating libraries. Until construction is complete, FLARE will be housed in a leased Interim Library Facility (ILF) and in the UF Libraries Auxiliary Library Facility (ALF), both of which support appropriate environmental and security conditions. In addition to the libraries in the 11 State Universities, partners in FLARE will include libraries of the Independent Colleges and Universities of Florida and the Florida College System.

High Density and Interim Facilities

- Architectural design for the High Density Facility (HDF) is almost complete. In fall 2012 the preliminary plans were presented to the Council of State University Libraries (CSUL) and the Council of Academic Vice Presidents (CAVP) of the Statewide University System. The $2 million in planning funds provided by the Florida Legislature in 2010 continues to be used to achieve “shovel ready” status by March 2013 and to prepare the UF Auxiliary Library Facility (ALF) collection for transfer to the high density facility. State funding for construction is anticipated in FY2014-2015, with the HDF expected to be operational two years later.

- UF Libraries have taken occupancy of the Interim Library Facility (ILF) under a 5-year lease with options for 2 one-year extensions. A coordinator has been hired to manage the 35,000 square foot warehouses and the processing of materials contributed to FLARE. ILF has a capacity for approximately 1 million additional volumes. The first delivery to the Interim Facility was received from University of Miami in October 2012.

Shared Collection Activities

- University of Miami shipped 175,000 volumes of journals and monographic series to the ILF for addition to FLARE. Additional partners are planning deliveries during the first half of 2013.

- Now formally named JRNL, an acronym for Journal Retention and Needs Listing, the open source journal storage management software developed by UF to support joint decision-making and holdings consolidation is in beta testing. This February the software will be reviewed during an ASERL meeting.
for further refinements before its release and to identify any additional requirements for future versions. The core functionalities include title status (retain/discard) tracking and identification of holdings, conditions of housing and use, and tracking of gaps for retained titles. Initially developed for FLARE and ASERL needs, the software has been written for possible broader adoption.

- UF Libraries continue to partner with Internet Archive (IA) for digitization of government documents and monographs held at ALF. To date 18,819 items have been digitized through IA and are being added to HathiTrust. Selection criteria are items not already in a trusted public domain digital repository that (1) duplicate monographs that are out of copyright, and (2) government documents from UF Centers of Excellence (COEs) as well as pamphlets and single folio documents most at risk for loss or damage. UF Libraries have established COEs for the Panama Canal Commission, National Recovery Administration, Institute of Museum and Library Services, Institute of Museum Services, National Commission on Libraries and Information Services, and Congressional Hearings, although this last is excluded from digitization initiative.

- Removal of duplicate monographs from ALF has reached 61% completion of the 78,000 duplicate monographs identified in the collection. Target end date for this phase of the work is June 2013. The next phase will focus on deduplication of journals. The process continues to include condition assessment to retain the best copy and evaluation of digital access either through HathiTrust or another trusted repository or digitization.

- 26%, or 260,115, of the 1 million low use monographs, journals and government documents in the UF stored collection have been processed for transfer to the high density facility. This is only a 1% increase since June 2012. This slower processing rate during second half of 2012 reflects the need to redirect key staff to set up ILF and manage the large volume of deliveries from the University of Miami. Production will increase during the first half of 2013 after completion of the training of new employees.

- To manage the two storage locations, ALF and ILF, permanent staff has been increased from four to five and temporary staff will increase from six to approximately 14. This will assure timely processing of FLARE materials for continued access as well as readiness for transfer to the future high density facility.

**Policies and Guidelines**

- A revised statewide last copy policy for monographs is under review.

- Full text of policies addressing collection materials and environment, physical and intellectual access, and operating cost assessments is available at [http://csul.net/node/774](http://csul.net/node/774).

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**University of California Shared Print (California Digital Library)**

Update for CRL Print Archives Network
ALA Midwinter 2013

UC Libraries continue to develop prospective and retrospective shared print collections to advance our goals of:

- Creating opportunities to reallocate library space
- Preserving the scholarly print record
- Providing access to print when needed

UC’s have several projects underway that are listed below. In the upcoming year, UCs will probably also:

- Continue to focus on coordination of retrospective collections, including broader initiatives to coordinate print monograph collections among libraries, storage facilities and digital repositories.
  - UCs expect to be a key participant in the HathiTrust Distributed Print Monographs Archive project.
    - [http://www.hathitrust.org/constitutional_convention2011_ballot_proposals#proposal1](http://www.hathitrust.org/constitutional_convention2011_ballot_proposals#proposal1)
  - UCs will continue to develop retrospective journal collections (e.g. UC JSTOR, IEEE, WEST) and will explore options for collaborating around government documents (federal) and medical journals (e.g. Med Print).
  - UCs are developing an approach to digitizing remaining public domain print holdings.
- coordinate print journal subscriptions
- work with libraries in the region and nationally to conduct research or plan for potential collaborative efforts around print collections management

Currently, UC Libraries have several projects underway in the areas of shared print policy development, collaborative collection development (prospective), and collaborative collection management (retrospective consolidation and archiving):

**Shared Print in Place Policy Development.** UC Libraries have provisionally endorsed a set of policies to support the distributed management of shared print collections. These policies apply to print resources that are held in full-service libraries. They extend the behaviors currently applied to stored materials to ensure “persistence” (or a “permanent” collection) over time, and they establish uniform access and descriptive metadata practices across campuses. Several committees are currently developing procedures to implement the policies.

[http://www.cdlib.org/services/collections/sharedprint/policies.html](http://www.cdlib.org/services/collections/sharedprint/policies.html)

**Prospective shared print monographs.** UC bibliographer groups and the UC Collection Development Committee endorsed their first set of prospective shared print agreements for monographic series. Campuses agree to retain print subscriptions for 3 years and to apply the Shared Print in Place policies when holdings remain on site (i.e., not in storage). Campuses are using a standard toolkit or MOU to simplify the proposal process.
Prospective Shared Print for Licensed Content. UC Libraries continue to receive a print copy of all journals in major e-journal packages including Elsevier Science Direct, American Institute of Physics, Blackwell-Wiley, Sage, Taylor & Francis, American Psychological Association among others. (Approx. 3,500 titles, valued at $5M.) UC Preservation librarians are currently developing an approach to auditing the digital content in Portico to help inform future strategies for these prospective journal collections.

Retrospective shared print journal archives.

- **WEST (Regional).** UC Libraries are active participants in the Western Regional Storage Trust. All campuses are members, four campuses are Archive Holders, multiple campuses supply holdings to the Trust’s archives held by various Archive Builders, and the Northern and Southern Regional Library Storage Facilities serve as Archive Builders. UC Libraries have creating a senior level coordinating committee to coordinate UC’s WEST activities. The California Digital Library also serves as the Administrative Host for WEST and has subcontracted with the Center for Research Libraries to develop the Print Archives Preservation Registry, which handles WEST’s collection analysis and registry functions.

- **UC JSTOR Shared Print Archive.** The University of California Libraries and JSTOR continue to develop a world renowned a paper repository of JSTOR’s e-journal collections. UC Libraries have developed a de-duplication service at the Southern Regional Library Facility to advance the development of the archive and libraries’ space reclamation needs. UC Libraries also invite contributions to fill gaps in the archive: see the “wish list” on this page: 
  [http://www.srlf.ucla.edu/jstor/default.aspx](http://www.srlf.ucla.edu/jstor/default.aspx)

- **IEEE Journals and Proceedings (Regional).** The University of California Libraries continue to build an archive of IEEE journals and proceedings at the Northern Regional Library Facility. This collection is also contributed to WEST. Major contributions from UC Berkeley and UC Davis.

Additional Information

Website: [http://www.cdlib.org/services/collections/sharedprint/](http://www.cdlib.org/services/collections/sharedprint/)

Shared Print Policies: [http://www.cdlib.org/services/collections/sharedprint/models.html](http://www.cdlib.org/services/collections/sharedprint/models.html)

Shared Print Agreements: [http://www.cdlib.org/services/collections/sharedprint/mou/](http://www.cdlib.org/services/collections/sharedprint/mou/)
The Washington Research Library Consortium (WRLC) was established as a non-profit corporation in 1987 to support and enhance the library and information services of universities in the Washington, DC metropolitan area. Currently, our partner universities are:

- American University
- The Catholic University of America
- Gallaudet University
- George Mason University
- The George Washington University
- Georgetown University
- Howard University
- Marymount University
- The University of the District of Columbia

The WRLC enables the success of learning and scholarship by creating coordinated collections, creating a robust infrastructure for discovery and access, ensuring the long-term preservation of physical and digital information resources and sharing expertise.

**Shared Collections Facility**

The WRLC operates a 24,000 sf shared collections facility (some people might think of it as a storage facility) on behalf of our partner universities. We completed construction of our second module in fall 2010 and now house 1.8M volumes and 40,000 archival boxes. The new module has filled surprisingly rapidly. This past year we have added more than twice as many volumes as have been accessioned in any previous year. In response to this rapid growth, we conducted a survey of the libraries in February 2012 to determine their future need for off-campus shelving capacity. The results pointed to our need to build a third module by 2015. Our Board of Directors has approved proceeding with design and permitting and our expectation is that our third shared collections facility module will be ready for occupancy in September 2014.

**WRLC Shared Copy Policy**

The WRLC Library Directors Council adopted our Shared Copy Policy on January 18, 2008. Recognizing that our offsite storage capacity is finite, the LDC agreed that the remaining capacity should be prioritized for unique materials by restricting duplicate volumes. Member libraries must be able to rely on permanent access to already-stored materials so they may de-accession duplicate copies to free space on campus.

No print serial volume may be added to the repository if it duplicates a print serial volume already stored. To date, over 115,000 duplicate volumes have been recycled. The policy limits print monograph volumes to a total of two copies of the same edition to help ensure the likelihood of permanent access to circulating monographs. The serial volume policy was implemented soon after adoption in 2008; we have been less successful implementing the policy for print monographs. The data is not available in our shared catalog to reliably identify duplicate
monographs. The rate of duplication among monographic titles, however, appears to be much lower than that for periodicals.

**Shared Microforms Collection**

Inspired by a suggestion by one of the library directors, the WRLC charged a task force in 2011 to identify duplicate microform titles, select microform sets to be shared copies and merge sets when required to ensure completeness. As a proof-of-concept pilot project the group identified 17 commonly-held titles in microform—a mixture of newspapers and magazines, including Barron’s, Business Week, the Christian Science Monitor, Commonweal, Financial Times, Los Angeles Times, MacLeans, Le Monde, New York Times, New Yorker, Newsweek, Time, Times of London/Suppl., Wall Street Journal, Washington Post, ERIC, and FBIS. In a consultative process member libraries—generally the library with the longest run of a title—volunteered to send their set to the WRLC facility. Microform scanning equipment and microform cabinets were provided by the libraries for use at the WRLC facility. We discovered, more quickly than we expected, that microforms take up space, too. Any future additions to the shared microforms collection will need to be accommodated within the shelving of our shared collections facility.

**ASERL – WRLC Archive Partnership**

The Association of Southeastern Research Libraries (ASERL) and the Washington Research Library Consortium (WRLC) have come to an agreement to create a print journal archive with enhanced delivery services for academic libraries in the southeast and Mid-Atlantic states. The project will combine the contents of our respective print journal archives under a single retention and access agreement. As a result, the combined title list exceeds 8,000 journal titles and more than 300,000 volumes, making this one of the largest print journal archives in the United States. WRLC and ASERL libraries have agreed to extend reciprocal priority Inter-Library Loan (ILL) services across the group. We are thrilled to join forces to make this a reality. Through informal conversations between the two organizations, it became clear that we shared the same goals and long-term needs for the programs each consortium had under development. It made clear and good sense to combine our efforts and create a region-wide print archive. The priority ILL service agreement is icing on the cake.

**Future Planning for Print Archive Management**

The WRLC will be considering a variety of ways in which we can maximize the value of our shared collections during the coming year. The libraries in the WRLC forecast a continued need for off-campus shelving, however, we want to manage that space as efficiently and effectively as possible. Our recent agreement with ASERL will help us limit unnecessary duplication of print journal titles while retaining access to those titles. We also plan to conduct an analysis of the collections of the nine partner universities to inform decision-making for current de-selection and retention, as well as furthering collaborative selection. We are looking at what we can do in-house with existing resources and data and what we could accomplish by engaging a consultant such as OCLC or Sustainable Collection Services.