

*Distributed shared print journal programs:
an evolution of support and services*

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Evolution of WEST's Business and Membership Model

Distributed, retrospective shared print journal program

- 70+institutions
- Members share program costs
- Members support local costs: disclosure, resource sharing, shipping, storage

Core program services:

- active archive creation at 6 storage facilities for high risk titles
- collections analysis and decision-support services (AGUA, JRNL)
- program, membership, and grant administration

Changes from Startup to Sustainability

Startup (2011-2013)

- Direct and consortial memberships
- <50% Archive Holders
- Membership fee tiers based on collections expenditures and Archive Holder credits

Sustainability (2013-2016)

- Mostly direct memberships
- >50% Archive Holders
- Membership fees tiers based on total library budget
- Differentiate member types and services

<http://www.cdlib.org/services/west/about/members.html>

Achieving sustainability

- Assess the program toward the end of startup, ask hard questions about core services and benefits, likelihood of continued participation
- Adjust services to focus on highest value to most members (archiving progress)
- Differentiate services and member types
- Adjust governance to reflect member types

WEST Assessment and Strategic Planning

- [WEST Phase 1 Assessment](#)
 - Member values existing program
 - Opportunities for change
 - Possible new directions
- [Program Adjustments](#)
 - Business and operations model
- [WEST Phase 2 Assessment](#)

Member Types and Services

Supporting Member

- Criteria
 - <\$5M
 - Non-Archive Holder
 - Can nominate titles
- Benefits
 - Access
 - Tools to make offers
 - Local collections analysis reports
 - Support archive creation elsewhere

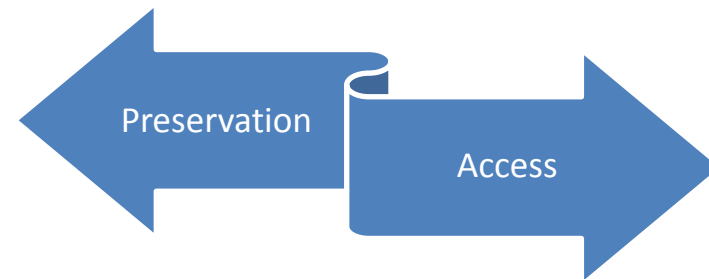
Full Member

- Criteria
 - >\$5M
 - Archive Holder
- Benefits
 - Access
 - Tools to expose and fill gaps
 - Eligible for group collections analysis and proposals
 - Subsidies for active archive creation (Builders)

Membership management

- Establish a base budget for cost-recovery 3 years ahead
- Gradually adjust fees to replace grant funding
- Publish multi-year member fees to help members plan
- Contain costs and innovation
- Expect and manage member adds and drops

Lessons learned managing institutional participation over time



- Strength resides in the middle class
- Changes in rate of deaccessioning and in membership can produce changes in core program values
- Change in leadership, more than program costs or mission, affects participation

Slow and steady



regular group decisions about “what to retain next?”

Shared print programs as learning organizations

Experiment

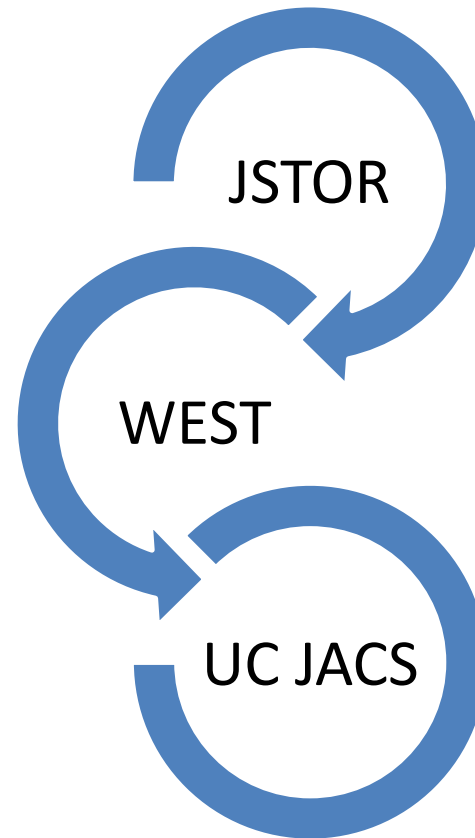
- Try
- Gather evidence
- Allow for startup hiccups
- Learn
- Refine or try again

Assess

- Learn from members
- Publish findings

Adjust

- Program Adjustments



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Thank you!



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