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

Emily Stambaugh
Shared Print Manager, University of California Libraries
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](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
Thank you!

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