



WEST Program Update

PAN Forum, June 2021

Western Regional Storage Trust <https://cdlib.org/west>

New in 2021!

In 2019, WEST wrapped up an extensive [program assessment and strategic planning process](#). In 2021, WEST has continued the work begun in 2020 toward answering the [2019 strategic recommendations](#).

Updated WEST Disclosure Policy Released

One of the recommendations issued at the 2019 strategic planning session was to “Convene a dedicated working group to review and revise as necessary the WEST Disclosure Policy and Validation Standards.” The DVS working group completed its review and revision of the WEST Disclosure Policy; the WEST governance groups have endorsed the updates and recommendations that WEST Archivers apply their changes to their retained holdings. The new policy is [now available on the WEST website](#).

Communications Resources

In its ongoing efforts to support member engagement with their local communities, WEST has developed [a set of resources to clearly and quickly communicate the value and function of WEST](#) at a high level and as viewed through different lenses. Included is a new Value of WEST infographic and a series of single-page briefs to introduce the concept of shared print and collective collections and describe the value and utility of shared print in different library functional and strategic domains. To support member communication back to the WEST program, a new [feedback form](#) is now live on the WEST website.

Onboarding New WEST Archive Builders

WEST onboarded two new Archive Builder institutions: the University of Denver and the University of Missouri. Starting in Cycle 10, they will contribute to the active archive creation of high-risk titles, consolidating and validating backfiles of journals with little to no electronic access. Many thanks to DU and Mizzou for their dedication and contributions to WEST!

OCLC Shared Print Registration

After a period of thorough testing and investigation into the new OCLC Shared Print Registration service, WEST is asking all retention members to begin using this new service and migrate any holdings on shared print second symbols to their primary OCLC symbols. WEST has documented three workflow options for members, and asks that they adopt the one that best meets their local needs. WEST has also collaborated with OCLC to develop a workflow to coordinate symbol migration with minimal burden on member resources, and continues to work closely with CRL to coordinate agent registration for those members that have requested it.

Tribute to Ivy Anderson

Ivy Anderson, the Collection Development and Management Program Director at the California Digital Library, announced her retirement from CDL, effective June 29, 2021. Ivy was instrumental in the initial planning and development of the WEST program, and has served as an *ex officio* member of the WEST Executive Committee since its inception. Ellen Finnie, currently the Open Access Publisher Agreements Manager at CDL, will begin as the new Director of Shared Collections at CDL on July 1. Many thanks to Ivy for her years of leadership, and warm congratulations as she begins this new chapter!



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Community

WEST is made up of over 60 member institutions, including 6 Archive Builders that take a leadership role in creating archives of high-risk print-only materials and over 30 Archive Holders that maintain archives of lower-risk materials. Additionally, six past members continue to maintain archives on behalf of WEST.

Archiving Progress

Cycle 10 disclosures are currently ongoing, but to date WEST has archived over 34,000 holdings of over 32,000 distinct titles, comprising an estimated 834,000 individual volumes. Roughly half of the archives are Bronze materials - titles which have reliable electronic surrogates available through CLOCKSS, Portico, or JSTOR. The remaining 50% of the archives are split nearly evenly between the two higher-risk archive types: Silver (journals that have electronic abstracting and indexing as well as some full text availability) and Gold (print only titles that have little to no electronic access available). Cycle 10 operations were significantly impacted by the widespread disruptions to on-campus operations experienced by most WEST members during the majority of the last year, slowing the pace of physical validation and archive creation. WEST anticipates that most Cycle 9 disclosures that could not be submitted in 2020 will be submitted in 2021, though most validation information will likely be added in future disclosure periods..

AGUA development

The fifth AGUA Development Phase (Phase 5) began in late January 2021 and will conclude in September 2021. Ten projects were initially prioritized for development, each providing significant enhancements to the AGUA decision support system and benefits to WEST members and the WEST program as a whole. A mid-phase report was distributed to members in May that provides a detailed overview of the projects, the development activities, and any outcomes: <https://cdlib.org/cdinfo/2021/06/03/agua-development-phase-5-mid-phase-report/>

WEST Working Groups

To realize the 2019 strategic recommendations, a number of working groups were convened in 2020 and 2021. Their accomplishments and future work are described below:

- *Disclosure & Validation Standards (DVS)*: The DVS group recently completed its review and revision of the WEST Disclosure Policy, described more fully below. The group is preparing to begin its next task, reviewing and revising (as necessary) the WEST Validation Standards.
- *Non-journal Formats (NjF)*: The NjF group has been conducting extensive research into potential areas of expansion for WEST's collection scope. The group has presented four refined proposals for areas of potential action to the WEST Operations and Collections Council (OCC), which has provided feedback and input. The proposals will be reviewed by the WEST Executive Committee before being discussed with the wider WEST community.
- *Resource Sharing (RS)*: The RS group has articulated key questions for WEST governance to consider regarding the nature of access in WEST and the infrastructure that supports resource sharing workflows. The group is engaged with similar groups in peer organizations to collectively advocate for improved support for shared print in resource sharing systems, and is investigating ways to leverage existing infrastructure to support resource sharing among members.
- *Vision, Mission, and Guiding Principles*: The Vision, Mission, and Guiding Principles group was convened in the spring of 2021. Members were drawn from the WEST governance committees and WEST program team. The WEST OCC has provided feedback on an initial draft of WEST's vision, mission, and guiding principles, which acknowledge WEST's unique characteristics while situating it in a larger national and social structure and



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provides a framework for understanding the possibilities and potential of shared print. The WEST Executive Committee will review the draft, which will then be shared with the wider WEST community.

Rosemont Shared Print Alliance

WEST continues its close collaboration with regional shared print programs through the Rosemont Shared Print Alliance. In 2021, WEST has been instrumental in developing and launching a Last Known Copy initiative to identify and secure retention commitments for scarce serials titles found in member library collections; developing new resources and training materials to help libraries navigate and leverage existing and emerging shared print tools and processes; and has participated in a Communications and Advocacy group convened jointly by the Rosemont Alliance and the Partnership for Shared Book Collections.