

Shared Print Repositories

Working Together on Library Collections

Edited by
Karen S. Fischer and Faye A. Chadwell



Shared Print Repositories

This collection addresses the growing endeavours of shared print repositories and programs in academic libraries, representing a global perspective with authors from Canada, Australia, Great Britain, and the United States. It illustrates the complicated processes and challenges of coordinating selection, determining storage agreements (distributed or shared), ownership concerns, business models, and a host of collection maintenance issues. These efforts entail immense collaboration, regardless of the size of the project. Luckily, librarians are good at collaboration, but not always good at forging ahead into an uncertain future with regard to print collections. As echoed by authors in this book, the future is indeed uncertain, but undoubtedly libraries who partner together to address print archiving dilemmas will be better prepared for whatever the future holds.

This book was originally published as a special issue of *Collection Management*.

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Collective Collection, Collective Action

Robert H. Kieft and Lizanne Payne

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Susanne K. Clement

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Rethinking Collection Management Plans: Shaping Collective Collections for the 21st Century

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The OHDEP Project: Creating a Shared Catalog for the Northeast Ohio Depository

Kay Downey

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Introduction

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The papers in this special double issue of *Collection Management* address the growing endeavors of shared print repositories and programs in academic libraries, representing a global perspective with articles from Canada, Australia, Great Britain, and the United States. As a whole, the articles illustrate the complicated processes and challenges of coordinating selection, determining storage agreements (distributed or shared), defining ownership, developing business models, and a host of collection maintenance issues. What really stands out after reading the twelve articles is the immense collaboration these efforts entail, regardless of the size of the project. Luckily, librarians are good at collaboration, but they are not always good at forging ahead into an uncertain future with regard to print collections. Fortunately for the library world, these articles illustrate that many engaged librarians are working on the complicated issues surrounding building shared repositories, many who are motivated and unafraid to see where the future takes us.

The first article, by Robert H. Kieft and Lizanne Payne, serves as an introduction to this special issue. Well known for their efforts regarding print preservation, Kieft and Payne summarize shared print programs in the United States and venture to predict what these programs will look like in ten years. They address the research and program development that will be required to achieve their vision for the future, which will require “the collaborative redevelopment of local print collections into regional and national collectives through the creation of large-scale, systematic dependencies that ensure expansion of access to materials” (Kieft and Payne 2012, p. 151).

The review article by Susanne K. Clement demonstrates the history and evolution of collaborative collection development in relation to shared print repositories in North America. The author covers early collaborative

projects, issues of space, and the early debates about collaborative storage, which involved targeting little-used print materials. Clement concludes by discussing current issues and directions of shared print repository projects.

Next, Samuel Demas and Mary E. Miller discuss the impact of shared projects on local collection management plans and propose writing formal plans in preparation for participating in shared print archiving programs. They offer guidance on developing a plan that will serve as a “practical framework” for local decision making and that “will provide a strong foundation on which to build as libraries begin to manage their collections collectively” (Demas and Miller 2012, p. 171).

The remaining 9 articles describe a wide variety of current collaborative projects in various stages of development. David J. Gregory and Karen Lawson describe a small pilot project among Iowa State University, the University of Iowa, and the University of Wisconsin-Madison to explore the potential for cooperative management of selected print journal archives across the three institutions. The authors address processes and complicating factors that arise, especially when working with serials. Scott Gillies and Carol Stephenson discuss the joint print repository shared by the Tri-University Group of Libraries in Canada, which has been utilized since 1996. The facility is currently at 94% capacity, requiring a collaborative weeding project among the three libraries who maintain separate ownership of the stored collections.

The next four articles describe larger consortial projects. Diane Bruxvoort, John E. Burger, and Lynn Sorensen Sutton describe the distributed print archive program in the Association of Southeastern Research Libraries (ASERL), which allows participating libraries to select the titles they wish to retain based on local needs and interests. The article by Mark Sandler, Kim Armstrong, Julianne Bobay, Mecheal Charbonneau, Brenda L. Johnson, and Carolyn Walters tells the story of the Committee on Institutional Cooperation’s effort to invest in a shared collection of 250,000 journal backfile volumes to be housed at Indiana University. Their efforts involved developing a list of core principles, an in-depth description about contracting for space at Indiana, and policies, governance, and operational details. The subsequent two articles describe consortial projects in Canada and Australia. Gwen Bird and Gohar Ashoughian discuss the Council of Prairie and Pacific University Libraries’ planning for a shared print archive with the impetus to clear the maximum amount of space at member libraries quickly, presenting challenges to meet short-term needs for space in participating libraries while building a plan that is scalable and allows the option to link to related initiatives, such as the Center for Research Libraries’ Print Archives Network. The last article describing a large consortial endeavor is by Janette Wright, Cathie Jilovsky, and Craig Anderson. The CARM (CAVAL Archive and Research Materials) Centre is a cooperative owned by a group of Australian university libraries, and this article describes lessons learned from the management of

the original CARM vault (which is now at capacity) and the development of CARM2, the second stage of their project. Using a new business model, the authors address how this affects the design and funding of a facility and they describe issues of governance as well as ownership.

The next article addresses the unique aspects of law collections as they affect planning for a shared collection. A core law collection is very similar from one law library to the next and the transition to digital formats has been a somewhat uneasy one for law librarians over concern of preserving the record of U.S. law in perpetuity. Authors Margaret K. Maes and Tracy L. Thompson-Przylucki state: “We do not know with certainty that current digital preservation and migration strategies will be sufficient to preserve the entire corpus of U.S. legal materials for future generations” (2012, p. 295). They describe how their two organizations, the Legal Information Preservation Alliance and NELCO, an international consortium of law libraries, are working together toward a collaborative solution to identifying a core print law collection that could be jointly held.

The final two articles in this issue speak to collaborative pilot projects regarding government depository collections. Chelsea Dinsmore and Valerie D. Glenn describe ASERL’s Collaborative Federal Depository Program, which is a distributed model that identifies “Centers of Excellence” that collect, maintain, and provide access to information for specific government agencies. Currently in a pilot stage, ASERL has identified publications from two agencies to start. Kay Downey’s article reports on the process of the Northeastern Ohio Cooperative Regional Library Depository to complete a pilot project that created a shared catalog for depository holdings, with the outcome of increased workflow and service efficiency. Downey discusses the motivation behind the project, the planning, the implementation, and the impact of a shared catalog, as well as issues surrounding ownership of materials.

Nearly a decade ago, the late Ross Atkinson wrote in a *Collection Management* article, “Cooperation is, somewhat paradoxically, one the few competitive advantages libraries have. Such cooperation does indeed entail significant risks for those libraries bold enough to engage in it—but those risks are in fact, negligible, in comparison with the dangers libraries will surely encounter by continuing to insist that they should each face the future alone” (2004, p. 19). As echoed by Kieft and Payne, and Sandler et al., the future is indeed uncertain, but, undoubtedly, libraries who partner together to address print archiving dilemmas will be better prepared for whatever the future holds.

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Collective Collection, Collective Action

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The economic situation of higher education, creation of vast digital collections, restructuring of knowledge production and distribution, and changing technologies and work practices give libraries incentives collectively to address a number of opportunities. Among these is adopting a radically collaborative approach to print collections. We extrapolate from shared print programs in the United States in 2012 a vision for print collections in the 2020s and discuss the developments needed to achieve it. This vision is the desirable outcome of libraries' defining their mission less in terms of serving local interests with local means than collectively serving students and scholars.

Let us imagine an ideal state for academic library print collections in the 2020s.¹ This ideal state will allow readers and researchers to discover and take full advantage of a universally available, communally preserved, audited library of digitized text and to discover and borrow preserved print materials through consorcially funded and governed repository and archiving systems. This ideal state has the further benefits of allowing libraries and their home institutions to pool resources for maintaining print collections, to prevent the loss of scarce and unique print publications because of local deaccessioning decisions, and to repurpose space and budgets to other aspects of their mission. Let our vision for that state benefit from a combination of the

20/20 hindsight that we enjoy in 2012 thanks to decades of experience with resource sharing and print collections collaboration, together with the riskier 20/20 foresight that enables the library community to predict the future based on this experience and on current trends in electronic information creation and distribution, teaching and scholarship, the restructuring of higher education, and, not least, the financing for and roles of libraries in the academic information economy.

A NEW WORLD OF PRINT COLLECTIONS

In the 2020s, then, all except a few campuses are repurposing the majority of their libraries' square footage to create the greater number and variety of work spaces that users, especially students, need: spaces for study, teaching, events, galleries, consultation, viewing, production, and collaboration. They are also bringing into the library building curriculum and scholarly support and publishing services and staff from other campus units in order better to integrate the range of activities in which students and faculty engage. They devote much less of their on-campus space to housing general collection print materials in open stacks, and they deliver through the network audio, video, and still image materials from databases they build or lease. Libraries have redeveloped their print collections in concert as regional and eventually national preservation and access partnerships; among them, these partnerships maintain a relatively small number of print copies for use by everyone. Committing most of the staff time that had formerly gone into building local print collections to building and managing access partnerships and to gathering print materials from countries without strong archival programs, academic libraries regard local, unusual, specialized, and unique materials as their primary collecting focus.

A handful of research libraries and collection partnerships accept preservation and access responsibilities for archives of general collection print materials on behalf of the national library community. This national system rests on the contribution of materials to these archivers and on systematic payments to them by the many other libraries that rely on such collections for long-term preservation and provision of materials. This system of print archives also rests on and indeed requires the general availability of immense repositories of digitized books and journals that readers and researchers use as their primary corpus of texts, repositories pioneered by such organizations as HathiTrust, Internet Archive, Google, Portico, and LOCKSS/CLOCKSS in concert with library-based digitizing programs and commercial organizations. Since readers' and researchers' working copies are the digitized copies and even as libraries gain access to digital materials through a shifting array of vendors, licensing arrangements, and purchases, the library community

maintains the record of publication both through preservation programs for digitized text and the collective print archive.

The network of archive collections initially relied on a mix of centralized and distributed approaches to archival designation, and the distinction between archival and service copies was much debated. As existing storage facilities have been deduplicated, however, and as reader preferences or habits changed in favor of screen-mediated use of text, the scholarly community has decided that physical copies are less important in most post-19th-century cases, especially in cases where the publication was printed from electronic files. As of the 2020s, therefore, the number of preserved paper copies is expected to dwindle further, and libraries that were concerned to maintain a distinction between (dark) archival and service copies are largely surrendering that concern because the demand for print copies is low enough that service copy collections are virtually becoming dark archives.

As members of consortia have analyzed their holdings to arrive at collective archiving and deaccessioning decisions, they have identified scantily held titles and moved to designate those as archival; in many cases libraries have chosen to give those copies to large archive builders, retaining copies locally only in cases of special collecting interests or curricular need for physical copies. The large, regional preservation and access collections, built initially on the older, less-used, and widely held materials already housed in storage facilities, are coming to include more recent or more specialized titles as well. Most small and medium-sized libraries decided in the 2010s that storing their own materials, although in some cases expedient in the short term, is in the longer term not in their best financial interest (Courant and Nielsen 2010) and instead divested in favor of access to digitized text and to physical text borrowed from archivers.

With the help of such granting agencies as the Andrew W. Mellon Foundation, Institute for Museum and Library Services, and Council on Library and Information Resources, organizations such as the Center for Research Libraries (CRL), OCLC, and individual consortia have coordinated development of information systems, data elements, and standards that support an international capacity to analyze, compare, and archive collections. These systems enable integrated discovery and use of this vast collection of print materials and their digitized versions as well as the efficient and reliable identification of scarce and unique copies for archiving and digitization. They allow a very high number of local disposition decisions to be made on the basis of automated analysis of records and to be executed with automated holdings changes. They also easily enable transfer of volumes to archivers and clearly and broadly communicate condition and archiving commitment information.

This reduction in size of the collective print collection has been effected in ways and on a schedule that recognizes disciplinary differences and distinguishes items that exhibit certain characteristics (publication auspices, association value, binding, textual and production differences, etc.),

thus creating a nuanced approach to archiving and serving copies. In the age of digital reproduction and distribution, this nuanced approach to collective physical archiving follows standards that mimic collecting practices that had been in place for rare books, that is, it protects items with artifactual value, saving all copies of all publications before certain dates in certain countries with that number declining as the age of mass book production progressed and reaching the zero point with books produced from digital files. In addition to saving on the collective costs of housing print on open shelves by housing fewer copies in high-density storage and by using digitized text for most purposes, the library community is gaining preservation capacity by caring for fewer copies.

The agreements that maintain this preservation and access structure require that ownership of print materials pass to those libraries that agree to serve as archive and service providers. The size of a library's collection, therefore, no longer determines a library's prestige, nor is size a measure of quality. Rather, quality is measured by the array of access services for readers and, for smaller libraries as well as the large archive holders, the scarce and unique materials they preserve and produce. These agreements also privilege scarcely held copies for digitization and specify periods for reviewing the archiving commitment in the context of changing study, teaching, and research practices.

Almost all readers for almost all the materials they use for study and teaching as well as for scholarly purposes prefer to use a digitized version of a text. They prefer this version except for certain well-defined purposes or occasions, in much the same way and for the same reasons that students and faculty had heretofore used the unusual and unique materials in special collections. The tens of millions of digitized books that readers use are available through commercial, nonprofit or membership, and consortial entities; this availability is based on legal and business models negotiated by library and publishing groups to compensate rights holders for use of in-copyright digitized text and is funded by library, consortial, and public budgets.

Publishers distribute in print virtually no scholarly books. Predictions that "print will not die" have proved incorrect except for certain populations and kinds of materials and for publishers in parts of the world that lack the financing necessary to produce and distribute electronic text. In the latter case, international partnerships funded by library consortia, governments, and foundations digitize that material as it is produced and distribute physical copies in national or domain-based collections to research library archives in Europe, North America, and, increasingly, China. Moreover, libraries and their consortia, foundations, and governments maintain public access to and discovery environments for this universal collection of digitized general and special collections materials through organizations modeled on the Digital Public Library of America, Europeana, and the Open Library, which all emerged in the years around 2010.

Demand-driven acquisition of print and electronic text initially served local library interests by reducing the number of volumes purchased. Such programs, however, soon fostered print-on-demand services through consortial or state-based production facilities, the establishment of regional acquisition programs for print monographs that did not find a demand-driven market, and the intensification of programs for consortial licensing of e-books. In the 2020s, scholars' use of and support for open access publishing and of forms of publication other than finished monographs has altered the academic publishing industry to the extent that many fewer "books" are published and scholarly reputation is based largely on other forms of communication and other measures of influence.

By the 2020s, libraries have arrived at these deep collaborative arrangements with respect to print collections because they and their home institutions decided that their role in higher education had to be less a matter of local response to the forces impinging on them in the first decade of the 21st century than a collective and strategic repositioning of the academic library in the information economy. Although this repositioning is radical in terms of collections, it is not unreasonable to regard the preservation and access arrangements they have adopted as an intensification or acceleration of the resource-sharing evolution that began with the first interlibrary loan. By the 2020s, in other words, libraries and their users have decided to focus on what their users do with library resources and on making the greatest amount of material readily and useably available to the greatest number of people rather than on housing general collection print materials locally, and they have committed resources accordingly to support a large-scale, integrated approach to preserving and giving access to print and digitized publications. This large-scale aggregation of the value of library collections and the governance structure needed to sustain it also allows campuses to reallocate the value invested in staff and facilities to libraries' other roles in the work of their users; that is, it allows them to move their buildings and services away from the "book-centered" to the "learning-centered" library (Bennett 2009).

THE STATE OF PLAY AND DEVELOPMENTS IN THE NEAR FUTURE

How will libraries get from where they are now in 2012 to this vision of a collaborative collections future? In fact, the road to the 2020s has been mapped, and its directions are already in place. As is evidenced by the cases mentioned below, committee reports, planning documents, and white papers; consortial programs for collaborative archiving, collection building, and data standard creation; policy and governance models; and grant-funded research and modeling projects point the way.

Over the past several years there has been an explosion of shared print initiatives among academic libraries in North America and around the world. A shared print agreement (also called “print archives” or “shared collection management”) is a formal program in which multiple libraries coordinate long-term retention of print materials and related services by one or more participants to support preservation and allow space recovery among campus collections. A shared print agreement is not the same as a shared storage facility. Rather, it is characterized by an explicit commitment to retain materials for a specified time period (or indefinitely) in potentially multiple locations by multiple partners. Shared print agreements typically define some or all of the following additional terms: ownership, selection, location/environment, validation, disclosure and discovery, access, and delivery.

As of 2012, shared print agreements are:

- *Regional and separate*: Most shared print programs have developed within existing library consortia, building on existing trust relationships, resource-sharing programs, and (sometimes) shared storage facilities.
- *Primarily for journals*: The vast majority of current programs focus on sharing print journal volumes, usually selected based on publisher and driven by availability of digital versions (e.g., JSTOR).
- *Often decentralized*: In many cases, archived materials are maintained in multiple collections or facilities rather than a single centralized location.

TABLE 1 Attributes of Shared Print Agreements

| | Description |
|---|--|
| Operating Plan (how it works) | |
| Selection | How materials are identified or chosen for the shared print collection. Examples: by publisher, by individual title nomination, by presence in storage facility. |
| Location | Centralized or decentralized location(s), in high-density facility or campus library space, required environmental conditions. |
| Validation | Level of review for completeness and condition (none, by volume or issue or page). |
| Disclosure and Discovery | How and where the shared print status of materials will be identified, what mechanisms for discovery will be provided. |
| Access and Delivery | What access and delivery services will be provided from the shared print materials, and to whom. |
| Administrative Plan (how it is managed) | |
| Retention | Commitment to time period to retain (most important). Often 25 years. |
| Ownership | Who owns the shared material. |
| Business Model | What costs are supported by the participants, and how divided. |
| Governance | How decisions will be made in the future. |

- *Long-term but not permanent:* Often programs have agreed on 25 years as a retention period. The agreement will then be reviewed before partners in the agreement renew it. Partners do not view perpetual commitment as viable, and shorter retention commitments do not inspire confidence in partners that want to deselect copies in favor of access from archived copies.
- *Providing access and delivery:* Most current programs developed “light archives” with materials made available to participants via consortial resource-sharing agreements that are already in place and do not require new workflows or “most favored nation” services.
- *Not supported by collective budgets:* Little or no money changes hands. In most programs, libraries absorb their own costs, and there is no formal business model involving cost-sharing or fees.

GETTING TO SCALE

Over the next several years, the current regional and ad hoc shared print initiatives are likely to be transformed by increased scale, scope, connectivity, and cost-sharing.

Increased Scale

Although most shared print agreements developed originally within the context of local or small regional consortia (e.g. Five Colleges, Inc., in Massachusetts), a number of “mega-regional” agreements have emerged.

TABLE 2 Examples of U.S. Shared Print Programs (by type of selection)

Shared storage copies (already in shared storage, redefined with retention commitment)

- University of California Regional Library Facilities
- OhioLINK depositories
- PASCAL shared facility in Colorado
- Washington (DC) Research Library Consortium (WRLC)
- Minnesota Library Access Center (MLAC)
- Florida Statewide Shared Collection (planning)

Library-nominated journal titles

- ASERL Journal Retention program
- Triangle Research Libraries Network (TRLN) single copy program

By journal publisher

- CIC Shared Print Repository
- Orbis-Cascade Alliance Distributed Print Repository
- Pennsylvania Academic Library Consortium (PALCI)
- Five Colleges (MA)

By domain or format

- ASERL Collaborative Federal Library Depository Program
- CRL Agriculture and Law preservation programs

Customized collection analysis

- Western Regional Storage Trust (WEST) (journals)
 - Maine Shared Collections Program (monographs and journals)
-