



OCLC Americas Regional Council Conference

# Tools & Strategies for Preserving Important Collections

---

JENNIFER BOWEN, UNIVERSITY OF ROCHESTER RIVER CAMPUS LIBRARIES

SUSAN STEARNS, BOSTON LIBRARY CONSORTIUM

KEITH CHEVALIER, SAINT ANSELM COLLEGE

**#OCLCARC18**





OCLC Americas Regional Council Conference

# Using Collections Data for Collection Retention

---

JENNIFER BOWEN, UNIVERSITY OF ROCHESTER

#OCLCARC18





## Jennifer Bowen

Associate Dean, Scholarly  
Resource Management

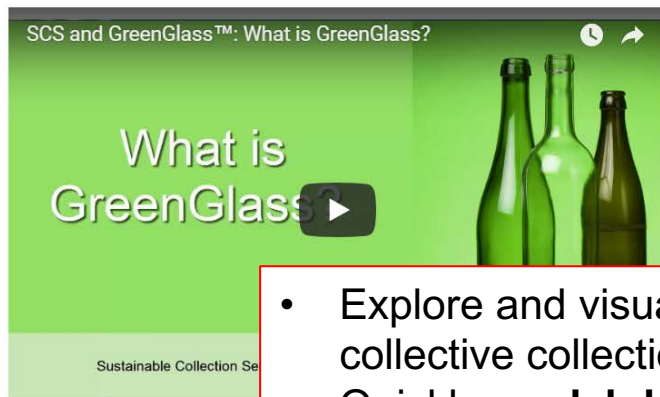


**#OCLCARC18**

Rush Rhees Library, University of Rochester



## Analyze your library or consortial collection to manage and share print monographs



### Visualize and model your collection

Sustainable Collection Services (SCS) provides tools and services to help manage and share print monographs. SCS offers GreenGlass®, a web application that allows single libraries and library groups to:

- Explore and visualize their collection in the context of the collective collection
- Quickly model deselection and print management scenarios
- Generate custom reports and lists to support weeding and other collection management activities

- Explore and visualize their collection in the context of the collective collection
- Quickly **model deselection** and print management scenarios
- Generate custom reports and lists to **support weeding** and other collection management activities

# Why GreenGlass?

**Initial motivation: Address rumors about  
widespread deaccessioning**

# Learning from our colleagues...

## “They’re discarding truckloads of books!!!”



Source: <https://publicityhound.com/wp-content/uploads/2010/09/truckload.jpg>



Source: <https://www.britevisualproducts.com/assets/img/products/large/boov1-double-sided-book-trucks.large.jpg>

# Changing the Conversation about our Collections

- Share collections data, demonstrate transparency, build trust
- Curate scarcely-held, rare (and “medium rare”) materials
- Build librarians’ knowledge about our collections
- Identify and address gaps in our collections



■ MATCHED  
8,877

■ COLLECTION  
1,524,116

Locations

RheesStack

Pub Year

before 1900

US Holdings (same edition)

< 5

■ UNMATCHED 99.41% | 1,515,239

■ MATCHED 0.58% | 8,877

600,000



“Medium Rare” items in the  
circulating collection

Source: [http://freefoodphotos.com/imagelibrary/meals/slides/medium\\_rare\\_steak.jpg](http://freefoodphotos.com/imagelibrary/meals/slides/medium_rare_steak.jpg)



■ MATCHED  
1,303

■ COLLECTION  
1,524,116

Locations

RheesRare

Pub Year

after 1950

New York Holdings (same edition)

> 50

■ UNMATCHED 99.91% | 1,522,813

■ MATCHED 0.08% | 1,303

600,000

...and “rare” items that are not so rare at all?

**Build newly-hired librarians' knowledge  
about our print collections**

**Support them in building relationships  
with faculty**

# GreenGlass “Collections Snapshots”

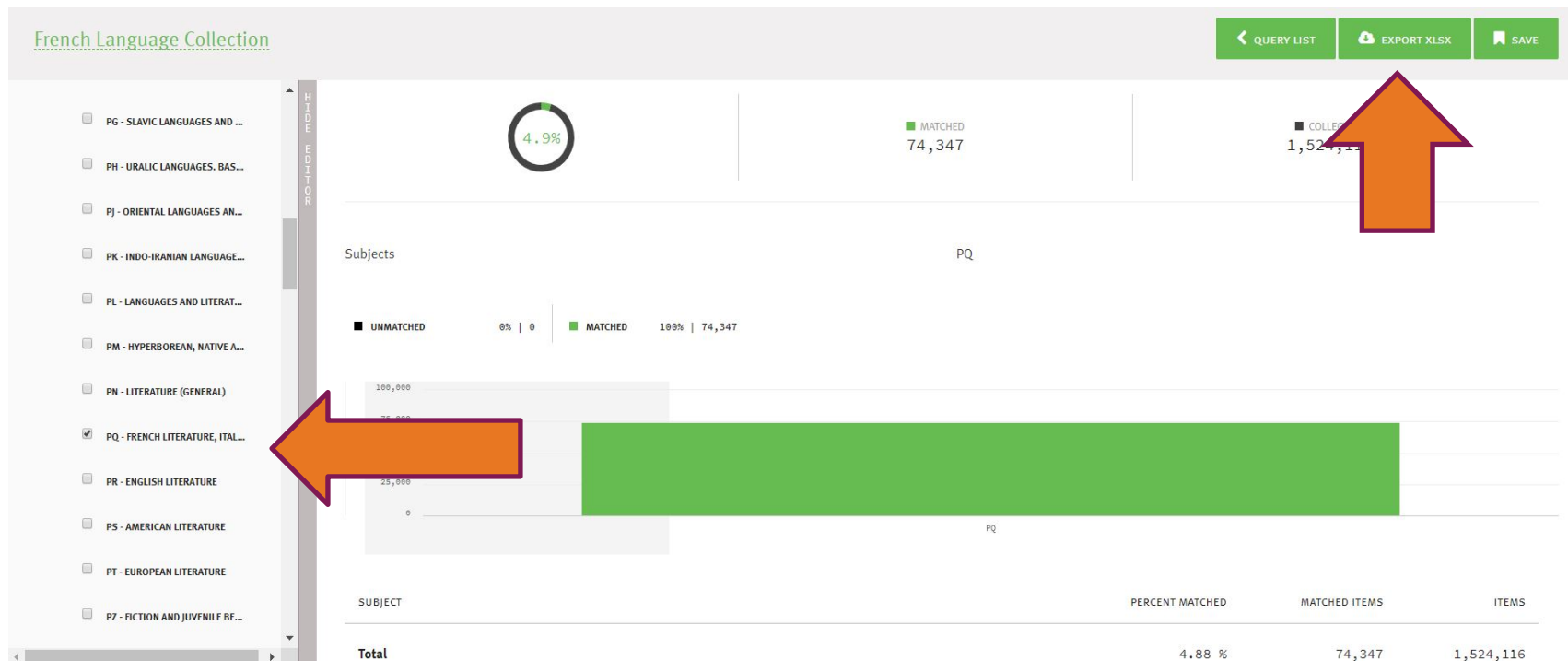
- What are the historic strengths or highlights of the collection?
- How does the collection support current teaching and research?
- What is the focus of current collecting activities? (Eg. topics, periods, movements, etc.).
- How does the collection relate to particular classes, and to faculty research?
- How does the collection support interdisciplinary research?
- What formats for books, journals, etc. do your faculty and students prefer?

# Identify and address gaps in the collection

# **Example: Generating Actionable Assessment of French Print Holdings**

**(Lindsay Cronk and Kristen Totleben)**

# Using Basic LC Parameters to Generate a List



# GreenGlass Export List Format

Includes not only local information but enriched info on uniqueness including HathiTrust holdings (including ability to filter by Public Domain), nearby holdings, and large academic holdings.

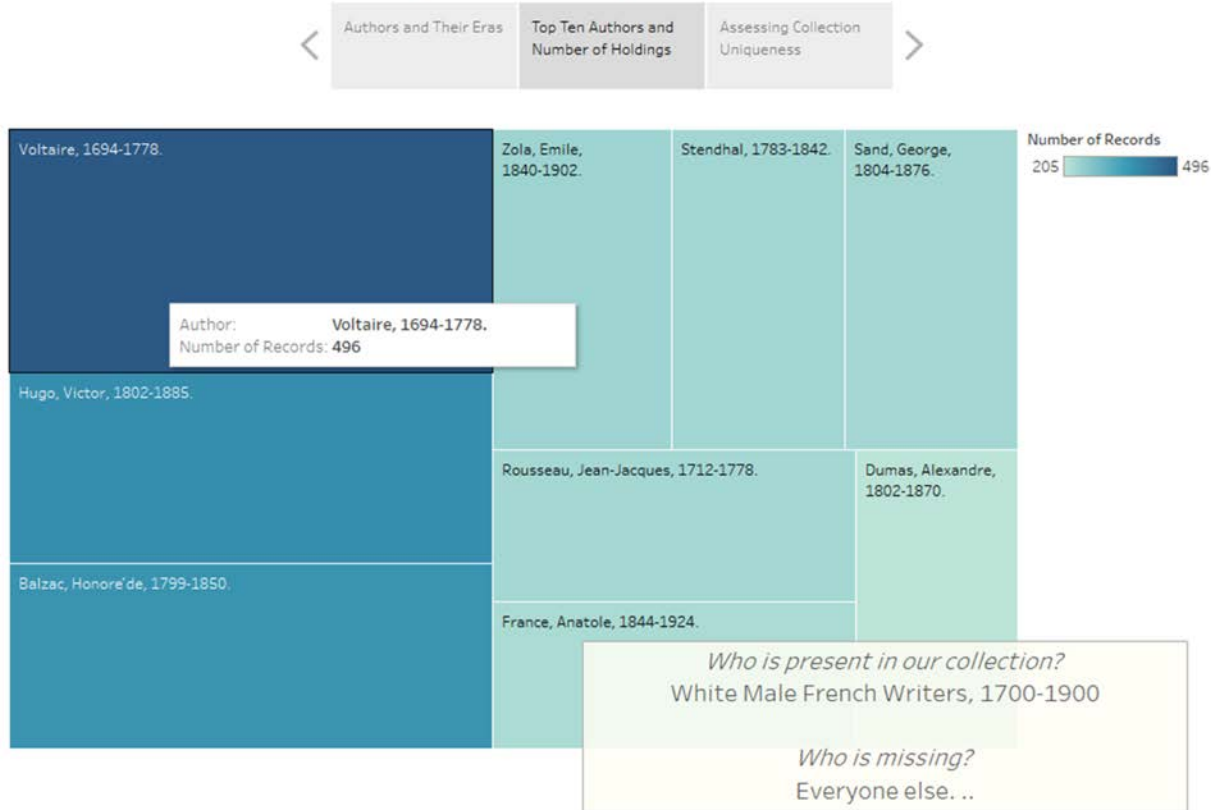
Location Code	Unique Call Number	Title	Documentation	Copy Number	Originals Available	Author	Pub		
Rheinstadl	PG 2.947 no. 149	La rive dans la penne et l'œuvre de Paul Claudel.	no. 149*	0	Yes	Epoux de Marthe, André.	[Paris, Lethes mod]		14
Rheinstadl	PG 2.947 no. 149	La rive dans la penne et l'œuvre de Paul Claudel.	no. 149*	0	Yes	Epoux de Marthe, André.	[Paris, Lethes mod]		14
Rheinstadl	PG 2970 no. 76	Histoire du théâtre des Breux et de Marion Lemaux. Index et notes de Robert Sabatier.		0	No	Théâtre, 1667-1763.	[Paris] Delmas [1966]	1966	
Rheinstadl	PG 2980 no. 133	L'âge du fer, pièce en trois parties.		0	No	Amiel, Denis, 1889-	[Paris, Impr. de l'Institut] CBEL.	1902	La Petite illustration ... no. 605, 28 novembre 1902. Théâtre (jour. heb.) no. 308
Rheinstadl	PG 2980 no. 133	George Bernard Shaw: a study of the man and the writer.		0	No	Speaight, Robert, 1894-1975.	New York, Liveright [1974]	1974	
Rheinstadl	PG 3077 no. 1286	Ticou, l'homme enragé. Contes de la ville de / a cura di Vittorio Pansa e Laura Pansa / introduzione di Mario Santagata.		0	No	Pansa, Vittorio, 1906-1975.	Milano : B. Mondadori, 1996.	1996	1. ed. (Mondadori)
Rheinstadl	PG 3077 no. 1286	Ticou, l'homme enragé. Contes de la ville de / a cura di Vittorio Pansa e Laura Pansa / introduzione di Mario Santagata.		0	No	López Flores, Manuel.	Madrid, Editorial Clásica [1991]	1991	1. ed.
Rheinstadl	PG 3077 no. 1286	Ticou, l'homme enragé. Contes de la ville de / a cura di Vittorio Pansa e Laura Pansa / introduzione di Mario Santagata.		0	No	Gómez de Avellaneda, Gertrudis, 1814-1827.	Madrid : Colón-Artes, 1974.	1974	Edición de autores españoles ... t. 172, 176, 179

# Parsing and Assessing

- Narrowed list in Excel (eliminating Italian, Spanish, Portuguese texts)
- Tableau for deeper analysis
- Defining collection development action steps

## Assessing French Print Holdings at University of Rochester

<https://tinyurl.com/frenchholdings>



# Librarian Liaison Engagement

“Having reliable data that demonstrated the overwhelming bias of the collection towards classic French literature helped me to identify the now obvious gaps in the collection. As a result of the assessment, I was able to formulate a selection plan that emphasized modern and contemporary francophone authors, and allowed me to track progress towards increasing the diversity of the collection. It also allowed me the opportunity to integrate many automated criteria into a French language approval plan.”

- Kristen Totleben, Modern Languages and Cultures Librarian

# Keys to Successful GreenGlass Integration

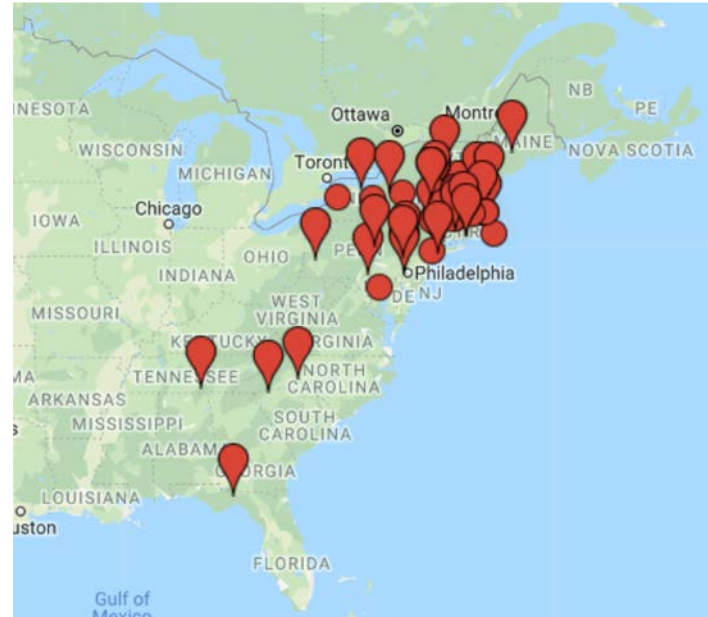
- Reusable Queries and Analysis: French analysis project = a template for collections review in other language areas
- Measurable Progress: track progress toward collection goals
- Next Steps: address fears about deaccessioning and weeding even as positive outcomes in collection development are obtained

# GreenGlass at the UR

## part 2: EAST!

# EAST: Eastern Academic Scholars Trust

- Shared print initiative involving 60 academic and research libraries in 11 states from Maine to Florida.
- Focused on retaining unique, scarcely held and frequently used scholarly monographs and serials in support of scholarship, research and teaching.
- <https://eastlibraries.org/>



# GreenGlass for EAST – Cohort 1



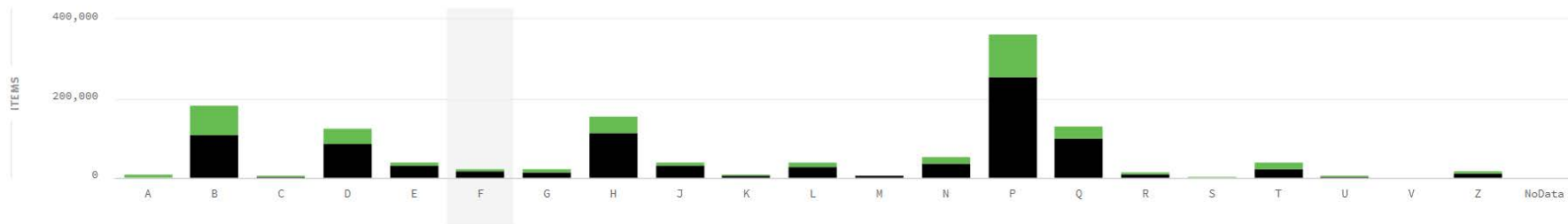
MATCHED  
397,329

COLLECTION  
1,327,829

Allocated for Retention

Allocated for retention in my library

UNMATCHED 70.55% | 18,388      MATCHED 29.44% | 7,674



SUBJECT	PERCENT MATCHED	MATCHED ITEMS	ITEMS
Total	29.92 %	397,329	1,327,829



**OCLC Americas Regional Council Conference**

# THANK YOU

**Jennifer Bowen**

**UNIVERSITY OF ROCHESTER**

[jbowen@library.Rochester.edu](mailto:jbowen@library.Rochester.edu)



OCLC Americas Regional Council Conference

# Assessing Special Collections using GreenGlass

---

KEITH P. CHEVALIER, SAINT ANSELM COLLEGE

#OCLCARC18





# Keith P. Chevalier

Archivist and  
Head of Special Collections



SAINT ANSELM  
COLLEGE



#OCLCARC18

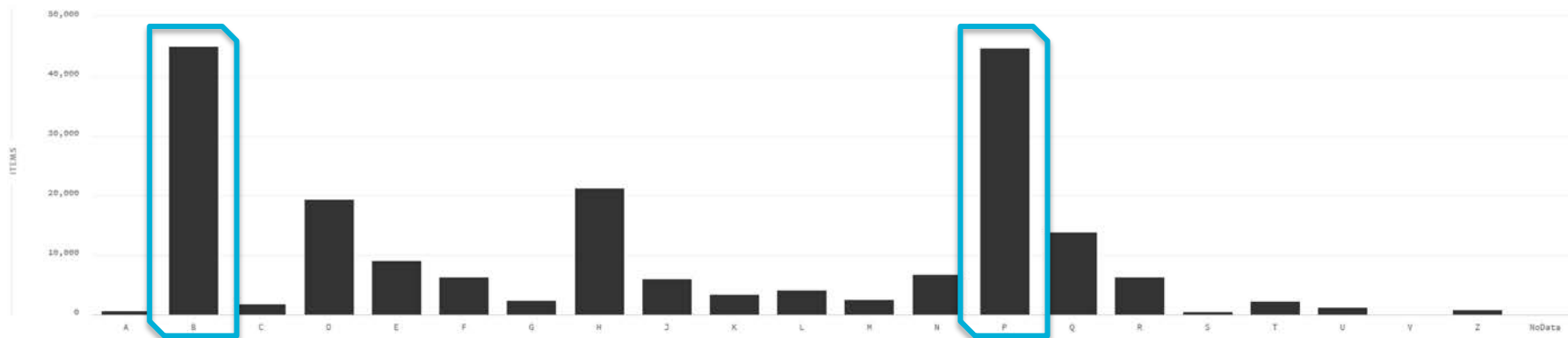


## Subject

Distribution: SUBJECT

Overlay: NONE

■ ITEMS 100% | 199,849



Philosophy, Psychology, Religion

Languages and Literature

Total

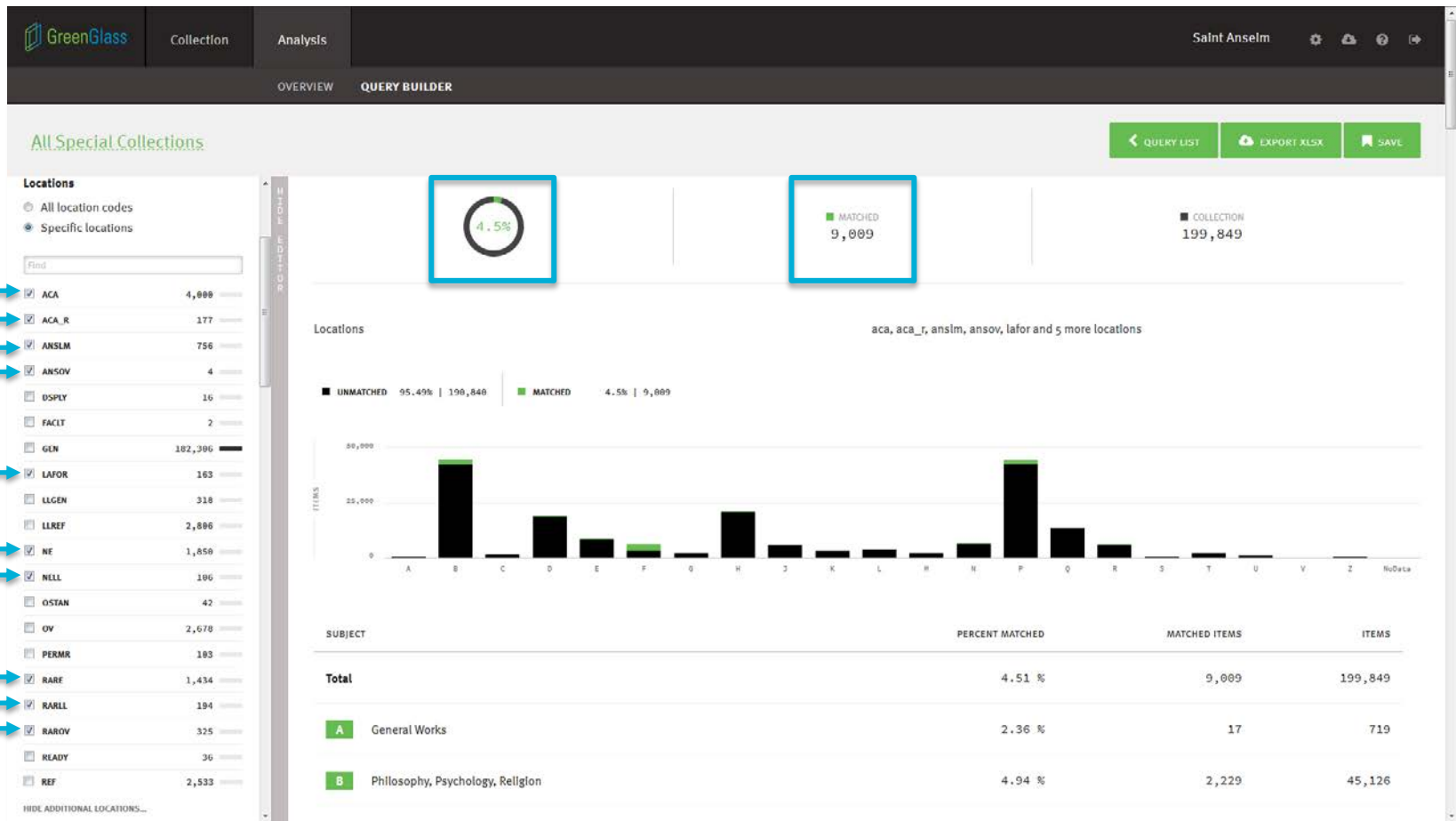
175,180

199,849

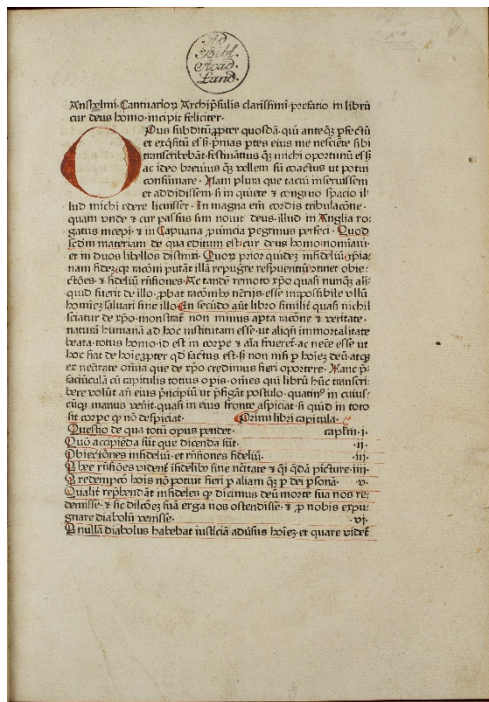
A General Works

296

719

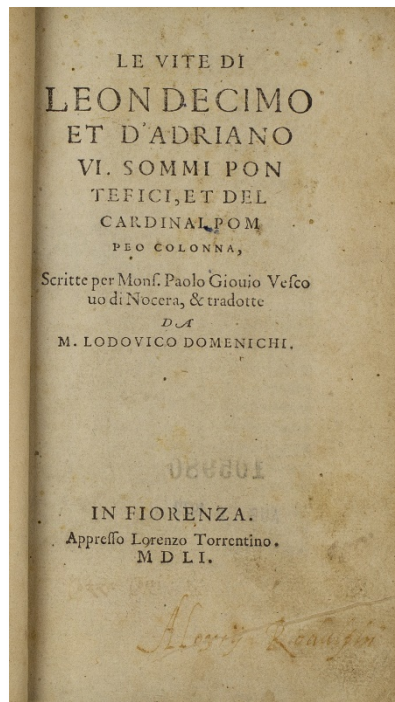


O'Rourke  
Saint Anselm Collection



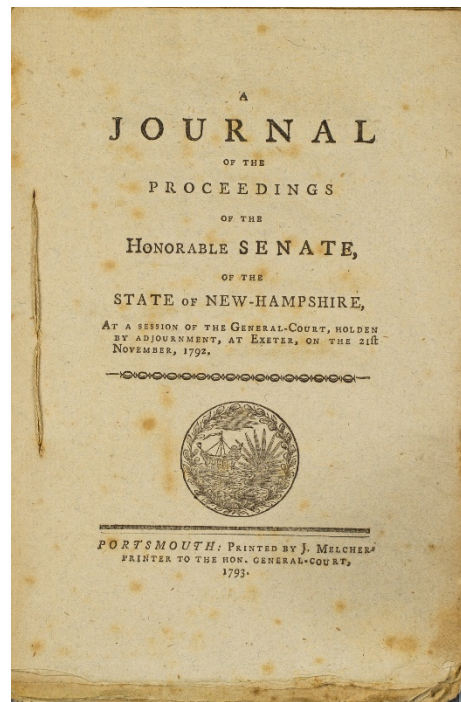
[Why God Became Man], 1474

Rare Book  
Collection



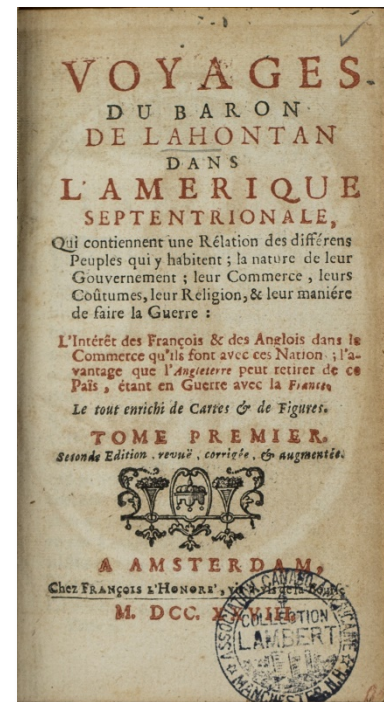
[Biographies, Leo X, Adrian VI], 1551

New England  
Collection



[Proceedings of the NH Senate], 1793

ACA / Lambert Franco-  
American Collection



[Voyages du Baron de Lahontan], 1728

# Anecdotal Rare?

## Franco-American Collections

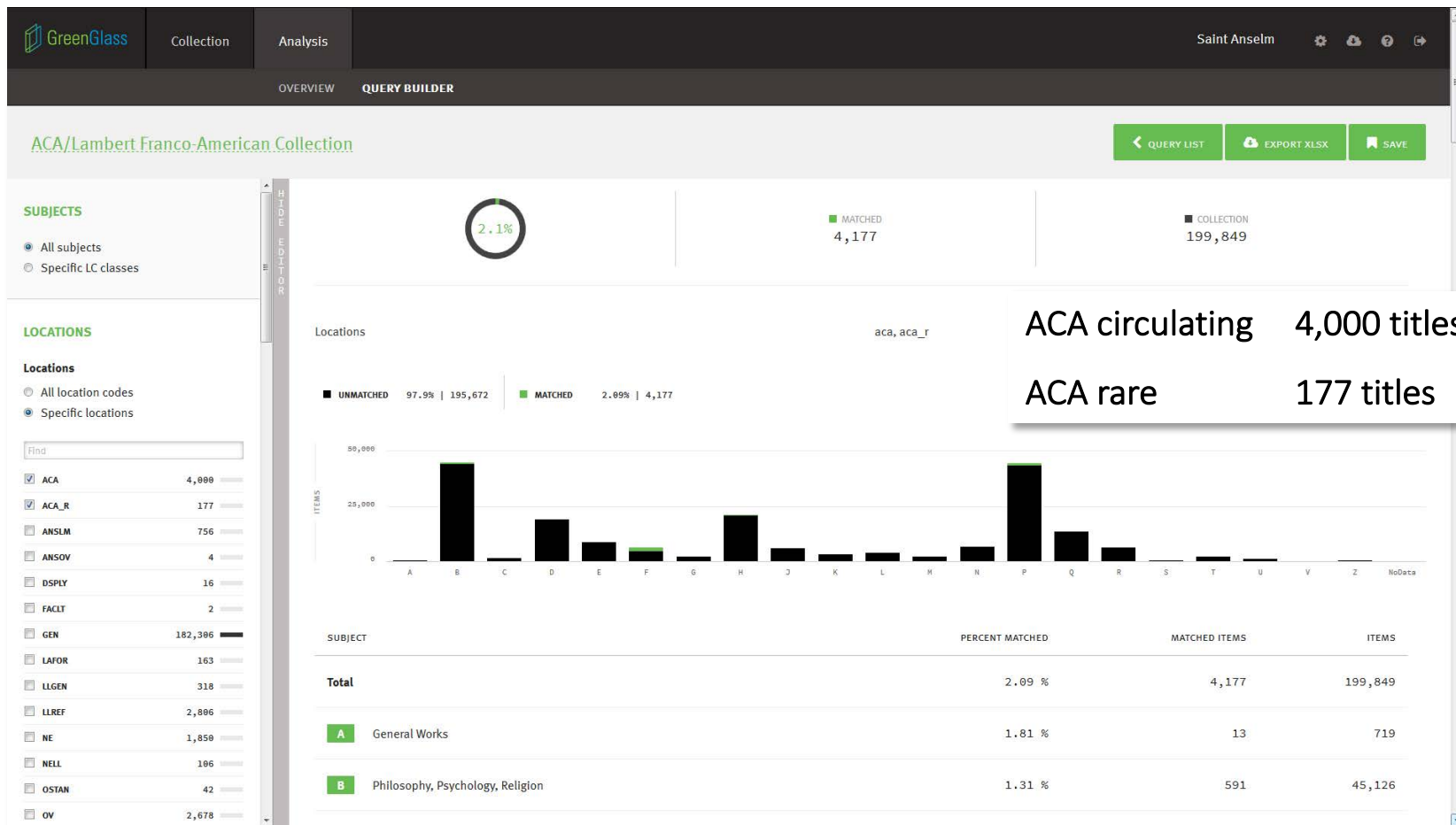
# ACA / Lambert Franco-American Collection



Adélard Lambert, 1867–1946



Association Canado-Américaine (ACA)



ACA circulating 4,000 titles

ACA rare 177 titles

# ACA Circulating



Z989.L3 A3 1927

aca

Journal d'un bibliophile / Adélard Lambert./Drummondville, Qué., Imp. La Parole, 1927.

OPAC

## LOCAL TRANSACTION DATA - TITLE LEVEL

Added to collection	2009-06-26
Recorded uses	0

## FORMATS

Bib record type	Book
Possible duplicate	No

## WORLDCAT HOLDINGS

US holdings	17 / 18
New Hampshire holdings	2 / 2
Comparator libraries	1 / 1

## OTHER

HathiTrust IC/PD	Yes / No
CHOICE/CHOICE OAT	No / No

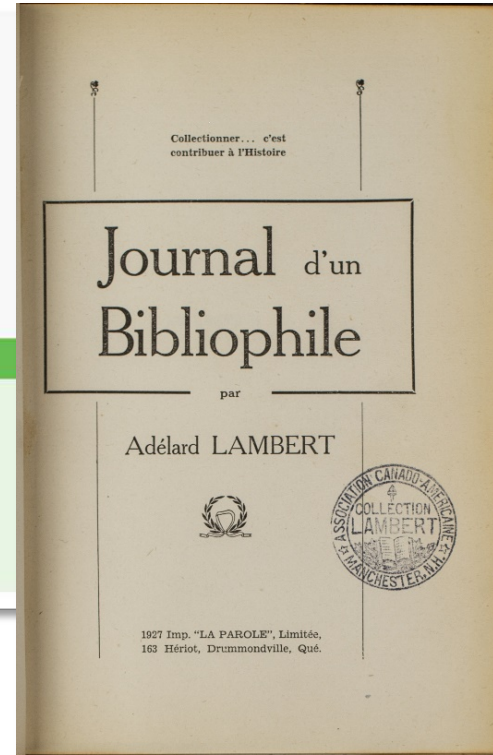
▲ HIDE DETAILS ABOUT HOLDINGS ▲

## COMPARATOR LIBRARY HOLDINGS

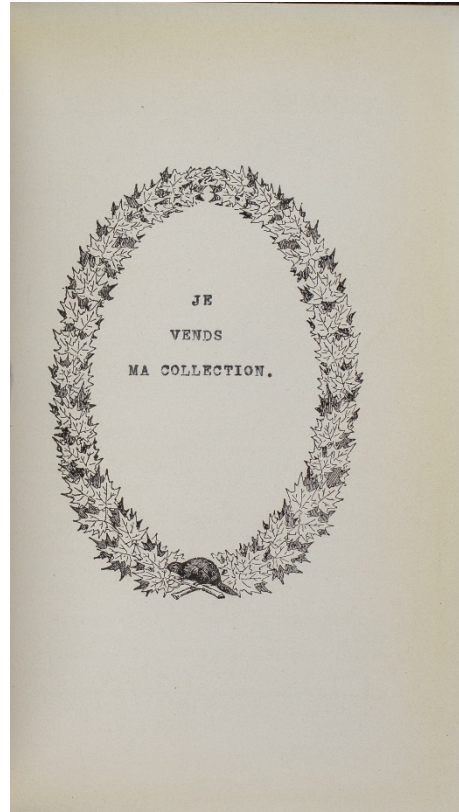
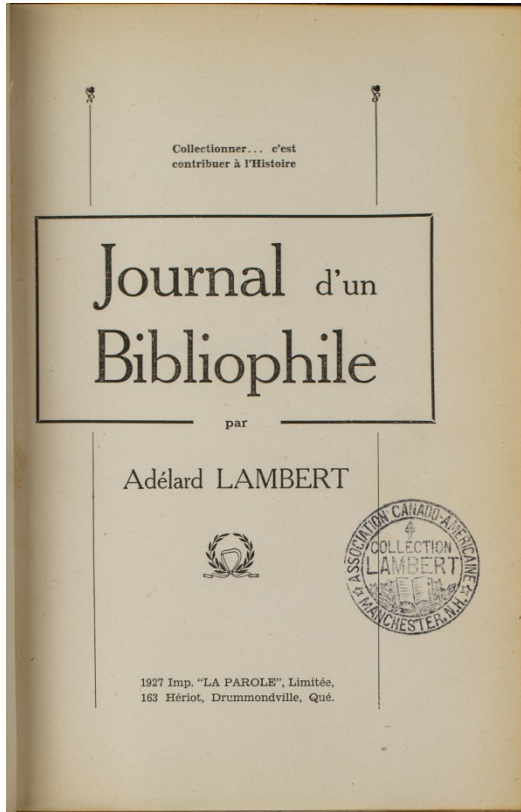
Southern NH Universities	0 / 0
Academic Peers	1 / 1
Benedictine Colleges	0 / 0

## OTHER

HathiTrust IC/PD	Yes / No
CHOICE/CHOICE OAT	No / No



## ACA Circulating



# ACA Circulating



PS1166 .A44 1971

aca

Thanatopsis : poème / version française de R. Dion-Lévesque ; illus. de Michelle Lavallée./Nashua, N.H. : Les Solitudes, [1971]

[OPAC](#)

## LOCAL TRANSACTION DATA - TITLE LEVEL

Date acquired 2009-06-30

Recorded uses 0

## FORMATS

Bib record type Book

Possible duplicate No

## WORLDCAT HOLDINGS

US holdings 4 / 4

New Hampshire holdings 2 / 2

Comparator libraries 1 / 1

## OTHER

HathiTrust IC/PD No / No

CHOICE/CHOICE OAT No / No

▲ HIDE DETAILS ABOUT HOLDINGS ▲

## COMPARATOR LIBRARY HOLDINGS

Southern NH Universities 1 / 1

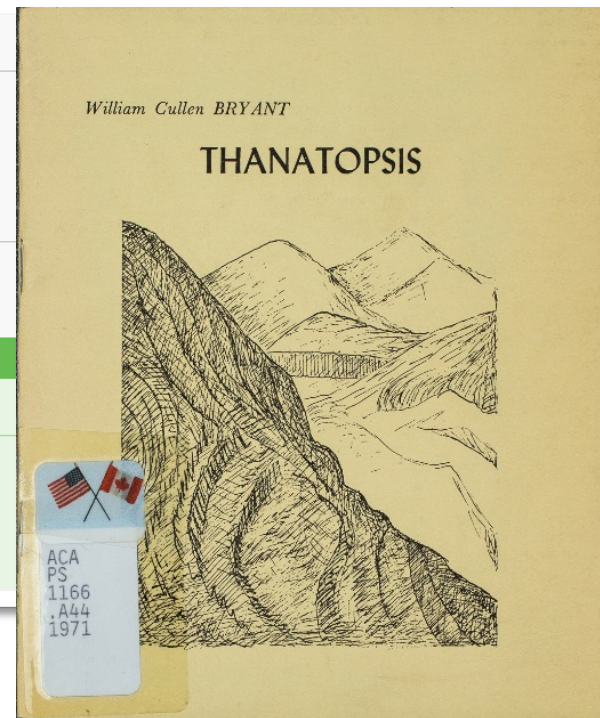
Academic Peers 0 / 0

Benedictine Colleges 0 / 0

## OTHER

HathiTrust IC/PD No / No

CHOICE/CHOICE OAT No / No



# ACA Circulating



M1678 .D47  
1922

aca

Les chansons de la nouvelle France : causerie faite sous le patronage des Sociétés Canadiennes-Françaises de la ville de New York / par le Dr. J. Jehin DePrume./Brooklyn, N.Y. : A. Giraldi, 1922.

[OPAC](#)

## LOCAL TRANSACTION DATA - TITLE LEVEL

Added to collection 2009-06-30  
Recorded uses 0

## FORMATS

Bib record type Book  
Possible duplicate No

## WORLDCAT HOLDINGS

US holdings 4 / 4  
New Hampshire holdings 1 / 1  
Comparator libraries 0 / 0

## OTHER

HathiTrust IC/PD No / No  
CHOICE/CHOICE OAT No / No

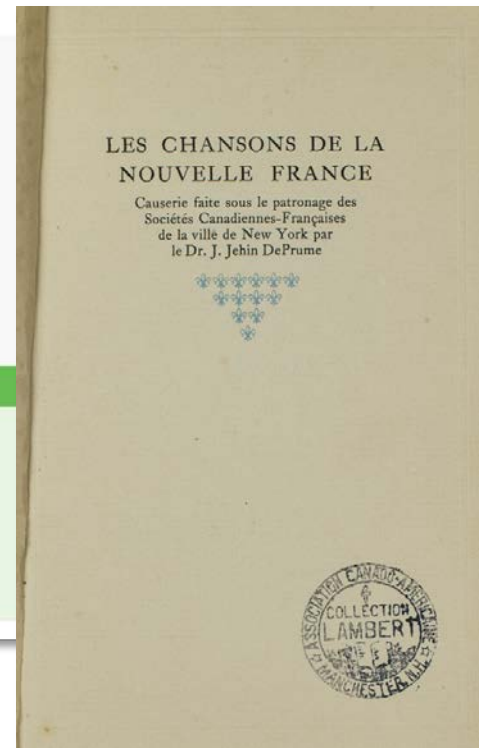
▲ HIDE DETAILS ABOUT HOLDINGS ▲

## COMPARATOR LIBRARY HOLDINGS

Southern NH Universities 0 / 0  
Academic Peers 0 / 0  
Benedictine Colleges 0 / 0

## OTHER

HathiTrust IC/PD No / No  
CHOICE/CHOICE OAT No / No



# ACA Rare



F1038 .H17  
1829

aca\_r

An historical and statistical account of Nova-Scotia, in two volumes : Illustrated by a map of the province, and several engravings / by Thomas C. Haliburton. /v.1/Halifax : J. Howe, 1829.

OPAC

## LOCAL TRANSACTION DATA - TITLE LEVEL

Added to collection 2010-02-23  
Recorded uses 0

## FORMATS

Bib record type Book  
Possible duplicate No

## WORLDCAT HOLDINGS

US holdings 117 / 200  
New Hampshire holdings 4 / 4  
Comparator libraries 1 / 3

## OTHER

HathiTrust IC/PD No / Yes  
CHOICE/CHOICE OAT No / No

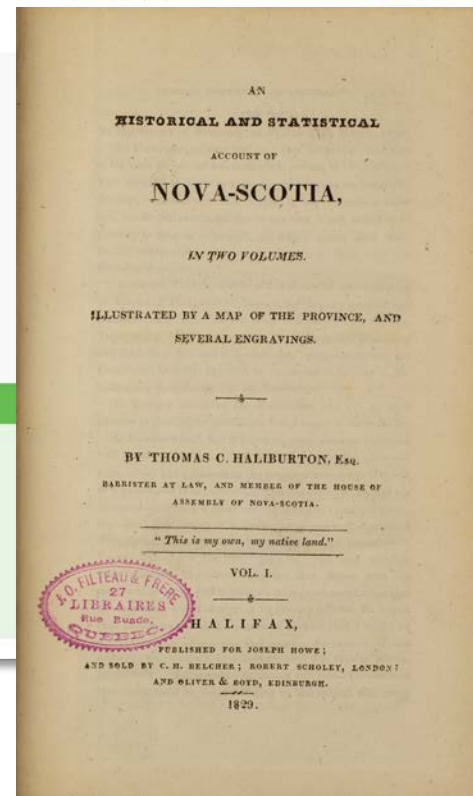
▲ HIDE DETAILS ABOUT HOLDINGS ▲

## COMPARATOR LIBRARY HOLDINGS

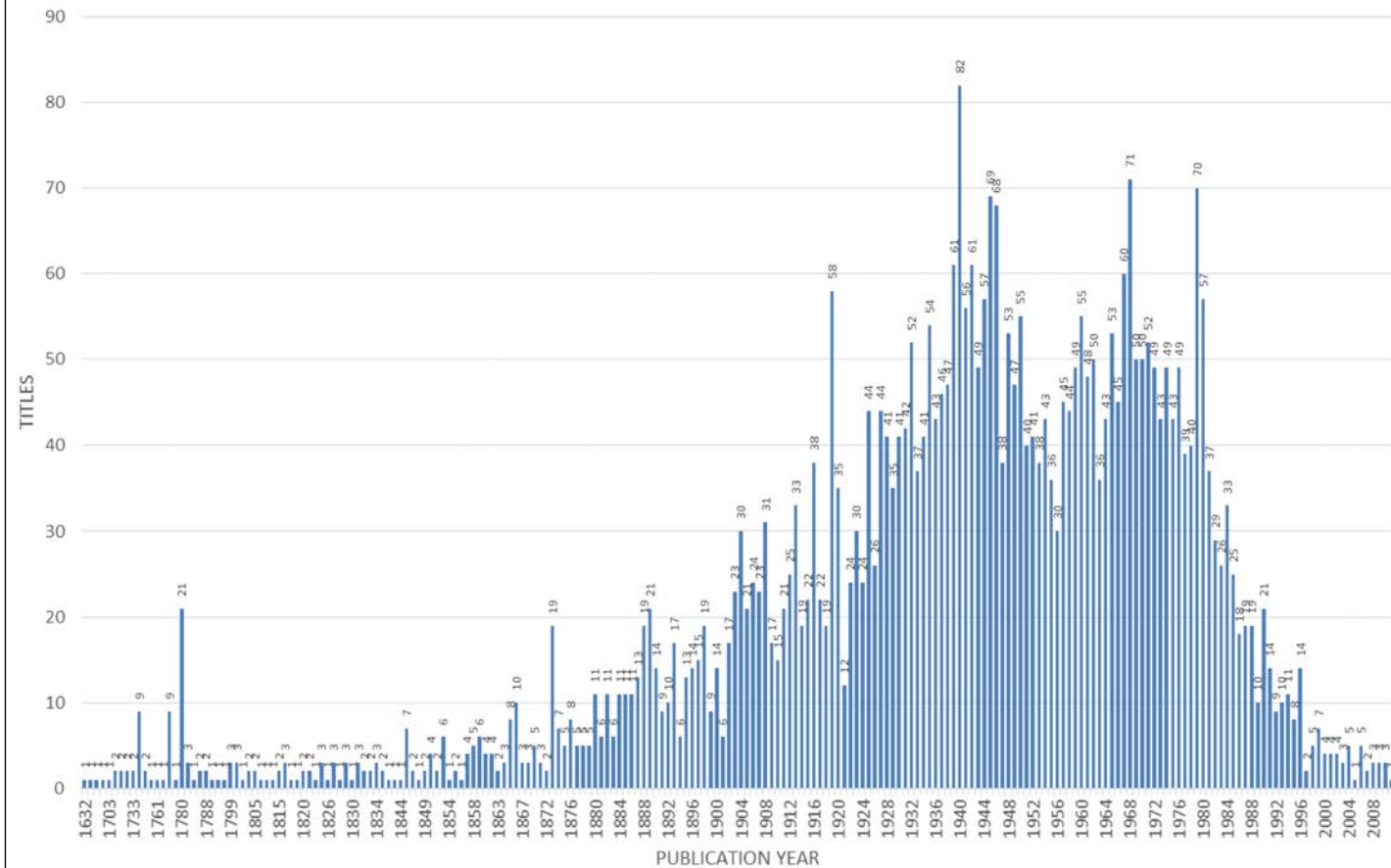
Southern NH Universities 0 / 0  
Academic Peers 1 / 1  
Benedictine Colleges 0 / 2

## OTHER

HathiTrust IC/PD No / Yes  
CHOICE/CHOICE OAT No / No



# ACA/LAMBERT FRANCO-AMERICAN COLLECTION



# Accidentally Special?

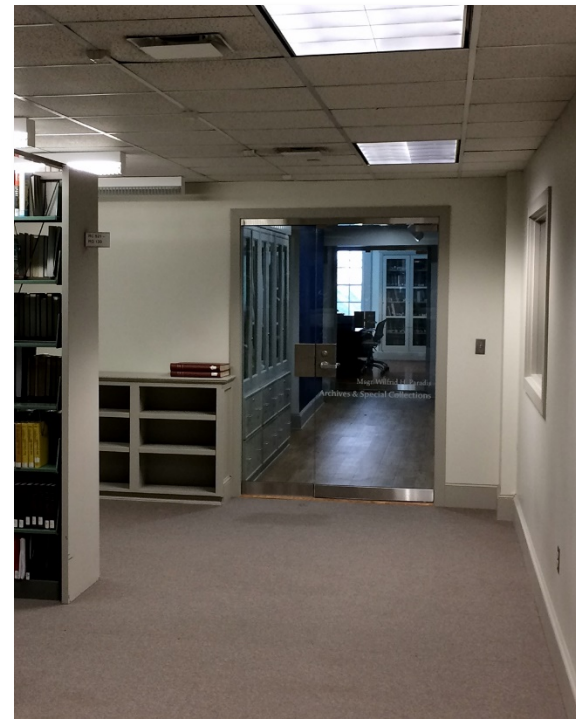
## Birds & Bees



Affected General Stacks, QH – RG



Renovation



Completion



Renovation affects six rows of shelving  
QH – RG

#OCLCARC18

Library Renovation, 2015 – 2016

Ornithology

&lt; QUERY LIST

 EXPORT XLSX SAVE

## WORLDCAT® HOLDINGS

Include items available elsewhere:

## Edition matching

- ☒ same edition  
☐ any edition

## US holdings

fewer than 

## New Hampshire holdings

no restriction ▾

## All comparator libraries

no restriction ▾

## Southern NH Universities

no restriction ▾

## Academic Peers

no restriction ▾

## Benedictine Colleges

no restriction ▾



MATCHED  
8

COLLECTION  
199,849

Subjects

QL

Locations

gen, llgen

US Holdings (same edition)

&lt; 10

■ UNMATCHED 99.48% | 1,535

■ MATCHED 0.51% | 8

QL, Fewer than 10 holdings 8 titles

ITEMS

2,000

1,000

0

QL

SUBJECT

PERCENT MATCHED

MATCHED ITEMS

ITEMS

Global Holdings

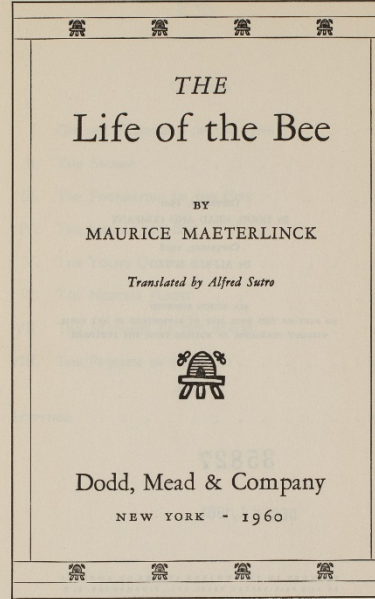
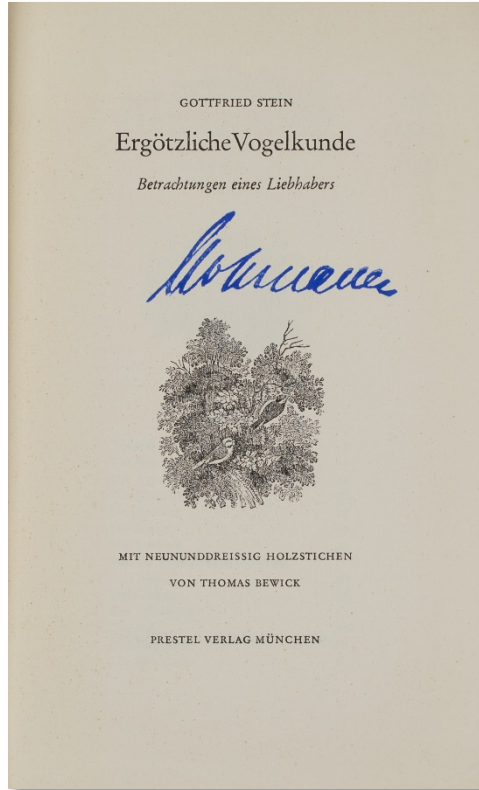
10

U.S. Holdings

6

U.S. any edition

6



Global Holdings

2

U.S. Holdings

2

U.S. any edition

200

# Other Uses: Emergency-Disaster Planning

**Priority 1**

Impossible to Replace

- Unique materials: manuscripts and archival records
- Irreplaceable items: rare books

**Priority 2**

Expensive to Repair or Replace

- High or significant research value that are expensive to repair or replace
- Volumes with significant research value that need special treatment if damaged (books printed with clay-coated paper)
- Microfilm masters

**Priority 3**

Materials on loan from Other Libraries

**Priority 4**

General Collection Priorities: may be replaced with other copies or format, but rank according to research value, then monetary value

- Liaison identified ranges and/or volumes or sets
- Heavily requested volumes
- Microfilm

**Priority 5**

Expendable

- Duplicate/secondary copies
- Replaceable with other formats (ebook, databases, etc.)
- Not essential to mission of library/college

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Location Code	Display Call Number	Display Call Number Normalized	Title	Enumeration	Copy Number	Possible Duplicate	Author	Publisher	Publication Year	Edition	Series	Recorded Uses - Item	Recorded Uses - Title	Last Change Date - Item	Last Change Date - Title	Last Add Date - Title	Global Holdings - Same Edition	US Holdings - Same Edition	US Holdings - Any Edition	New Hampshire Holdings - Same	New Hampshire Holdings - Any
gen	BL48.Q47	0 BL 0048000 Q 47 0	Dieu et l'homme créateur.		1	No	Quevremont, Pierre.	[Paris] Editions du Cerf [1965]	1965		Rencontres ; 67.	0	0			1994-06-2	23	16	16	1	
gen	BL53 .J36 I320	0 BL 0053000J 36 I320	The varieties of religious experience : a study in human nature being the Gifford lectures on natural religion delivered at Edinburgh in 1901-1902 / by William James.		1	No	James, William, 1842-1910.	New York : London : Longmans, Green, and Co., 1920. c1902.	1920		Gifford lectures ; 1901-1902.	5	5	2005-11-26	2005-11-26	1994-06-21	2	2	200	1	
gen	BL80.2.M 35	0 BL 0080200 M 35 0	Maître et disciples dans les traditions religieuses : [actes / du colloque organisé par le Centre d'histoire comparée des religions de l'Université de Paris-Sorbonne] ; sous la dir. de Michel Meslin.		1	No		Paris : Editions du Cerf, c1990.	1990		Patrimoines. Histoire des religions.	0	0			1994-06-2	11	5	22	1	
gen	BL163 .P35 2008	0 BL 0163000P 35 2008	Natural theology ; or, evidence of the existence and attributes of the deity, collected from the appearances of nature / William Paley ; edited with an introduction and notes by Matthew D. Eddy and David Knight.		1	No	Paley, William, 1743-1805.	Oxford, New York : Oxford University Press, 2008.	2008		Oxford world's classics.	0	0			2009-06-2	10	6	200	1	
gen	BL205 .F4	0 BL 0205000 F 4 0	La Réalité suprême dans les religions non-chrétiennes.		1	No		Rome, Presses de l'Université Grégorienne, 1968.	1968		Studia missionalia, v. 17.	0	0			1994-06-2	24	19	19	1	
gen	BL221 .A23 1999	0 BL 0221000A 23 1999	Christianisme, judaïsme et islam : fidélité et ouverture / Académie internationale des sciences religieuses ; sous la direction de Joseph Doré.		1	No	Académie internationale des sciences religieuses.	Paris : Editions du Cerf, 1999.	1999			0	0			2003-09-21	26	16	16	1	
gen	BL310.B8 8	0 BL 0310000B 88	The age of fable, or, Beauties of mythology. Edited by J. Loughran Scott.		1	No	Bullfinch, Thomas, 1796-1867.	Philadelphia, D. McKay, [c1838]	1838	A new rev. and enl. ed.		3	3			1994-06-15	6	6	200	1	
gen	BL480 .K3	0 BL 0480000 K 3 0	Teufel, Dämonen, Besessenheit : zur Wirklichkeit d. Bösen / Walter Kasper, Karl Lehmann (Hrsg.) ; mit Beitr. von Walter Kasper... [et al.]		1	No		Mainz : Matthias-Grünevald-Verlag, 1978.	1978	1. Aufl.	Grünevald Reihe.	0	0			1994-06-21	37	17	17	1	
gen	BL615.S3 5	0 BL 0615000S 35	Enraciner l'Evangile : initiations africaines et pédagogie de la foi / Anselme Titianma Sanon, René Luneau.		1	No	Sanon, Anselme Titianma, 1937-	Paris : Cerf, 1982.	1982		Rites et symboles, 0750-196X ; 14.	0	0			1994-06-2	31	18	18	1	
gen	BL624 .S565 1986	0 BL 0624000 S 565 1986	Spiritual gems / Savan Singh.		1	No	Savan Singh, Sarguru, 1858-1948.	Punjab, India : Radha Soami Satsang Beas, 1986, c1965.	1986	7th ed.		0	0			1994-06-2	11	7	15	1	
gen	BL625.S2 7E9 1978	0 BL 0625000 S 27 E 9 1978	Sarmad, Jewish saint of India / by I. A. Ezekiel.		1	No	Ezekiel, Isaac A.	Punjab, India : Radha Soami Satsang Beas, 1978.	1978	3rd ed., corrected.		0	0			1994-06-21	25	18	124	1	
gen	BL620.B2 K4713 1976	0 BL 0620000 B 2 K 4713 1976	Dionysos : archetypal image of the indestructible life / C. Kerényi. Translated from the German by Ralph Manheim.		1	No	Kerényi, Karl, 1897-1973.	London : Routledge & Kegan Paul, c1976.	1976		Archetypal images in Greek religion ; v. 2.	2	2	2005-09-20	2005-09-20	1994-06-15	25	14	14	1	
gen	BL620.B8 K47 1976	0 BL 0620000J 8	Zeus and Hera : archetypal image of father, husband, and wife / C. Kerényi ; translated from the German by Christopher Holme.		1	No	Kerényi, Karl, 1897-1973.	London : Routledge & Kegan Paul, 1976.	1976		Archetypal images in Greek religion ; v. 5.	3	3	2010-03-12	2010-03-12	1994-06-15	58	10	200	1	

## Salvage Priorities: **Modern Languages & Literatures; Music**

### **Priority 1**

- All items in Rare locations (97 items total)
- All Music (Class M): 6 items
- All Modern Languages & Literatures (Subclasses PC–PD; PF–PG; PL, PQ, PT): 91 items

### **Priority 2**

- Some items in the ACA collection (370 items total – see attached Excel file)
- Most Music (Class M): 27 items
- About half of the French language and literature items (Subclasses PC, PQ; call number range: PC2068 – 3680; PQ139 – 3939)
- A few Music items (subclass ML) in the Reference collection (40 items total):
  - The New Grove Dictionary of Music and Musicians (29 volumes)
  - The New Grove Dictionary of American Music (4 volumes)
  - The New Grove Dictionary of Jazz (3 volumes)
  - The New Grove Dictionary of Opera (4 volumes)

### **Priority 3**

- All French literature items in the General collection (call number range PQ1 – 3999): about 2,900 items

### **Priority 4**

- Everything else (with the Krantz CD collection salvaged last).

# Summary

## **GreenGlass is useful in:**

- Assessing Special Collections;
- Identifying scarce materials in general collections; and
- Complementing projects from weeding to emergency and disaster planning.



**OCLC Americas Regional Council Conference**

# THANK YOU

**Keith P. Chevalier**

**SAINT ANSELM COLLEGE**

[kchevalier@anselm.edu](mailto:kchevalier@anselm.edu)



OC LC Americas Regional Council Conference

# Collection Analysis for Shared Print: The S/J Challenge

---

SUSAN STEARNS, EASTERN ACADEMIC SCHOLARS' TRUST (EAST)

#OCLCARC18





## Susan Stearns

Executive Director, BLC

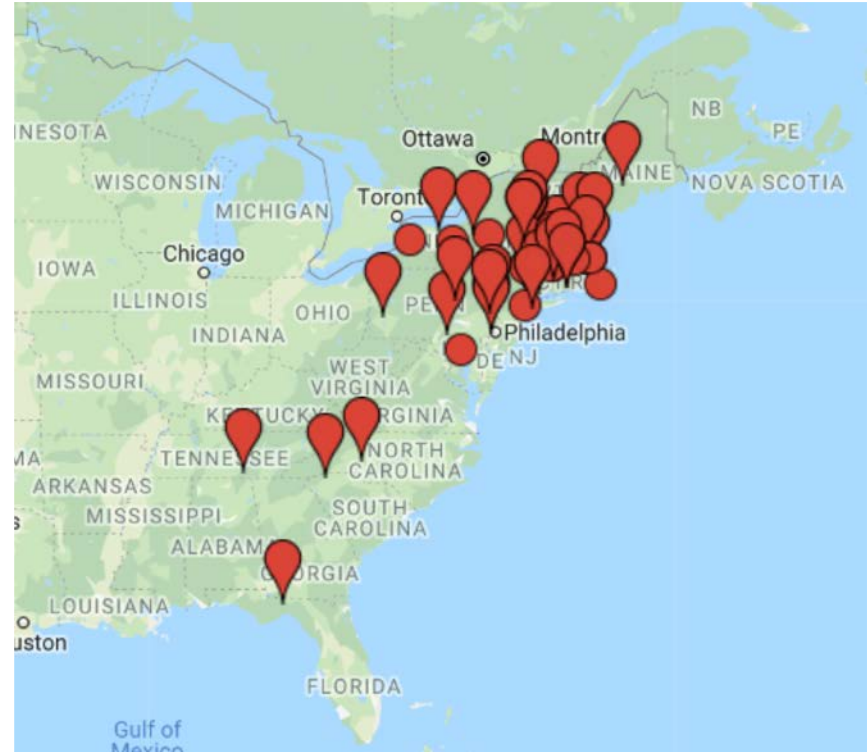
Project Director, EAST

# EAST = Eastern Academic Scholars' Trust

A shared print program protecting  
the print scholarly record

60+ academic & research  
libraries from Maine to Florida

9.2 million monographs and  
over 5K serials/journals titles  
committed to retention



**The EAST experience of  
working with  
GreenGlass™ for  
monograph retention  
spoiled us.**



Center *for* Research Libraries

GLOBAL RESOURCES NETWORK

EAST contracted with CRL to:

- Validate, normalize and compare holdings & item records across libraries
- Provide a suite of Excel spreadsheet reports to EAST for review
- Based on EAST's development of a retention model, facilitate retention allocations across the participating libraries

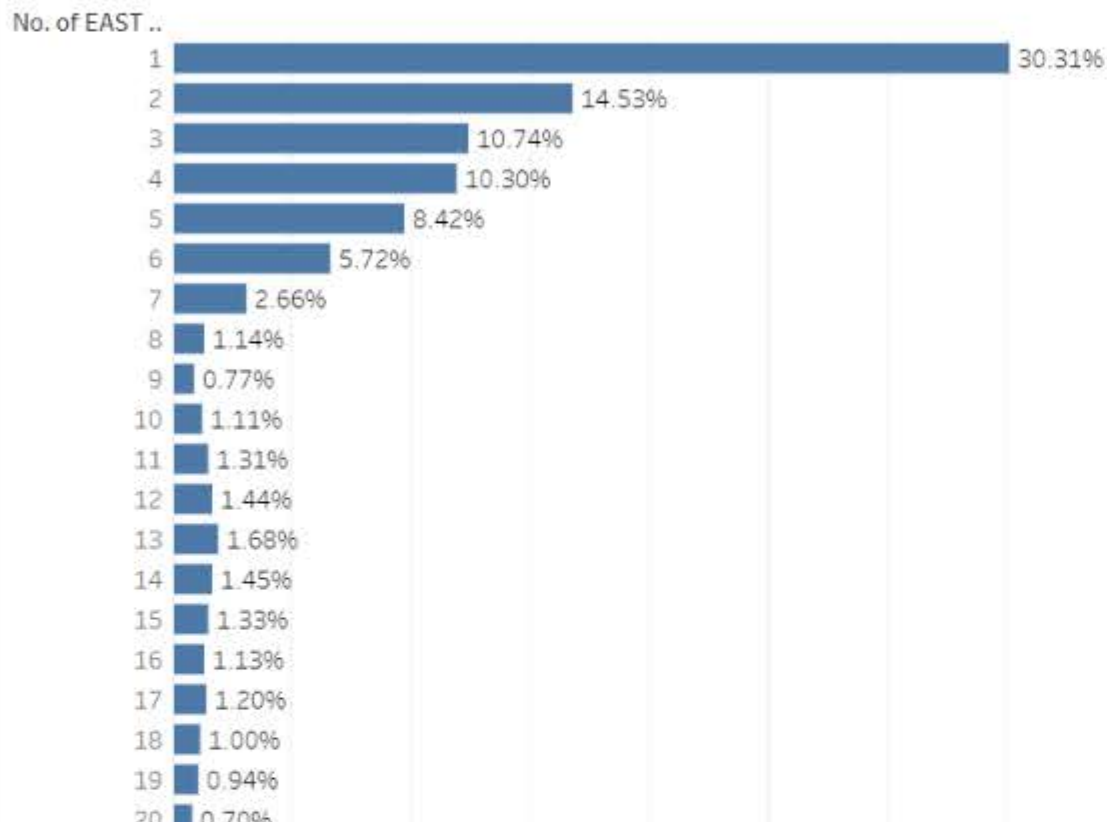
ID	OCLC	ISSN	Title	Language Code	Country of Publication	008 date 1	008 date 2	LC	electronic exists	Electronic OCLCs	In PAPR	In PAPR - Fixed	Number of Copies in PAPR	Number of Copies in PAPR - Fixed
1	3E+05		Bulletin of information & sample tests	eng	nju	1900	9999	L						
2	5E+05		The Biographical cyclopaedia of American women	eng	nyu	1924	9999	C	Yes	891546696				
3	7E+05		Transactions	eng	nyu	1950	uuuu	Q						
4	7E+05		Boletín estadístico trimestral: Quarterly statistical bulletin	spa	xx	1900	9999	H						
5	7E+05		Abstracts of papers: [presented at the] meeting	eng	dcu	1900	9999	Q	Yes	988398331				
6	7E+05		History of Japan	eng	ja	1953	9999	D	Yes	988176783				
7	8E+05 0001-0030		AAAS bulletin	eng	dcu	1942	1974	Q			Yes	Yes	1	1
8	8E+05 0001-1460		AIAA student journal	eng	nyu	1963	2002	T	Yes	733024864	Yes	Yes	1	1
9	8E+05 0032-471X		Population review	eng	cau	1957	1998	H			Yes	Yes	3	5
10	8E+05 0015-1408		Film society review	eng	nyu	1965	1972	P				Yes		2
11	8E+05 0015-1238		Film fan monthly	eng	nju	1900	9999	P						
12	8E+05 0001-1452		AIAA journal	eng	nyu	1963	9999	T	Yes	45739692; 31955394	Yes	Yes	6	5
13	8E+05 0001-0456		ABC pol sci: advance bibliography of contents, political science & government	eng	cau	1969	2000	Z			Yes	Yes	3	4
14	8E+05 0001-155X		A.I.D.C. journal	eng	mau	1966	1980	H	Yes	7486045; 760889444				
15	8E+05 0425-0494		English in education	eng	enk	1967	9999	L						
16	8E+05 0015-511X		Focus on exceptional children	eng	cou	1969	2012	L			Yes	Yes	3	4
17	8E+05 0027-0865		Moodys OTC industrial news reports	eng	nyu	1970	1999	H	Yes	760767414				
18	8E+05 0005-7894		Behavior therapy	eng	nyu	1970	9999	R	Yes	60620267	Yes	Yes	8	6

# From spreadsheets to data visualization

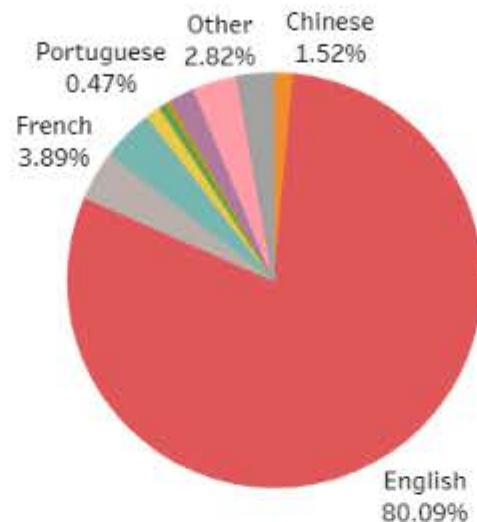
- Our experience of working with Tableau convinced us it could supplement CRL's work by providing data visualization and real-time data analysis tools
- Provides high level data on the collection serials and journals collections of EAST
- Allows us to focus on groups of titles held by different numbers of EAST member libraries
- Once we have agreed upon a retention model, Tableau simplifies the process of review of title lists by libraries

## EAST Title Holdings Levels

Total Holdings: 231,974



## Languages



## LC



Titles	Totals by Library	EAST Titles Overlap by Library	Scenario 1-Phase 2	Scenario 1 Titles	Scarce	Scarc
--------	-------------------	--------------------------------	--------------------	-------------------	--------	-------

### Cohort 1

**68,413** Title Sets

**132,632** Title Holdings

**41,828** Unique to C1

### Cohort 1 & Cohort 2 Combined

**111,403** Title Sets (distinct OCLC #s)

**231,974** Title Holdings

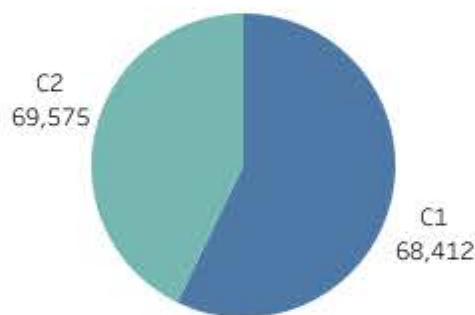
**26,584** OCLCs Overlap between C1 & C2

### Cohort 2

**69,575** Title Sets

**99,342** Title Holdings

**42,991** Unique to C2





This pane changes to reflect the filters

Titles		Totals by Library	EAST Titles Overlap by Library
Totals by Library			
Total Title Sets: 3,490   Total Title Holdings: 7,778			
No. Titles in Library: # of titles in library that match criteria and filters			
EAST Holdings: Number of holdings of those titles across EAST library's holdings.			
E.g. in this example, if EAST holdings is set to 2-2, it would mean that XYZ matching this criteria, and these titles are also held by one other library (additional 3), for a total of 6 EAST holdings.			
EXAMPLE: XYZ College 3 6			
NOTE: These numbers are <u>NOT</u> the number of titles that would be allocated; they are simply POTENTIAL allocations in a given scenario. Allocations will be as possible.			
Library		No. Libr	
Coast Guard		11	
DeSales		34	
Hofstra		38	
NYU		319	
Pitt		2,36	



Slider to filter by # of libraries holding a title



Other filters to limit or expand the model

EAST Holdings

4 6

Cohort

☐ (All)

☐ C1

☒ C2

EAST Retained

☐ (All)

☒ No

☐ Yes

Rosemont

☐ (All)

☒ No

☐ Yes

Critical Corpus

☒ (All)

☒ No

☒ Yes

Library

☒ (All)

# Challenges

- Most serials/journals projects have focused on specific publishers or subjects where this type of analysis is not required
- Serials collection analysis is HARD
- Still new for CRL so setting expectations and ongoing communication have been critical
- Dirty data can be intimidating for the libraries
- Libraries focus is more on withdrawals than on retention

# Lessons Learned

- Allow adequate time in the project plan for data review
  - multiple titles cataloged on one record, preceding/succeeding titles cause challenges, electronic/microgram cataloged on print record....
- Stay focused on the mission, but be flexible
- Acknowledge that withdrawal is a major goal
- CRL is a good partner for this work but using Tableau was critical to facilitate analysis at scale
- Go for it!



**OCLC Americas Regional Council Conference**

# THANK YOU

**Susan Stearns**

**EAST**

[sstearns@blc.org](mailto:sstearns@blc.org)