



**Stewarding  
the Collective  
Collection**

# Making Shared Print Work:

**Insights on Workflows, Data, and Tools**



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## INTRODUCTION

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Collective collections—the combined collections of a group of libraries, analyzed or managed as a single collection—have become an important aspect of collection stewardship. Group-scale collection management presents opportunities to manage materials more efficiently, reduce duplicative collecting, make local collection strengths visible to larger audiences, and obtain valuable intelligence to inform local collection management.

This report examines the workflows, data, and tools used to manage shared print collections for monographic materials in the US and Canada. Effective stewardship of collective collections requires an operational infrastructure that translates the concept of collections at scale into a practical reality. Shared print programs are a key area where this operational infrastructure has been evolving for some time. Understanding this evolution—where it is currently and where it might go in the future—is essential for all stakeholders in the ongoing sustainability of shared print efforts. The findings discussed in this report provide community-driven insights into the present state of workflows, data, and tools in shared print, which, in turn, suggest areas of opportunity and prioritization as shared print’s operational infrastructure continues to evolve.

**Effective stewardship of collective collections requires an operational infrastructure that translates the concept of collections at scale into a practical reality.**

Drawing on insight gained through interviews and survey data, the findings in this report provide insight into:

- Key workflows supporting stewardship of shared print monograph collections
- Data and tools currently used to support these workflows
- Perceived gaps in data, tools, or other resources, and opportunities for collective stewardship of print monograph collections, if these gaps are addressed

The findings are presented as a set of key takeaways, each underpinned by specific results from the interviews and survey. Taken together, they provide timely, community-driven insights to help library leaders and staff understand and respond to a dynamic shared print landscape. The findings supply practical insight into the workflows, data, and tools that matter most to libraries involved in shared print programs, as well as perspectives on how they may evolve to improve the efficiency and value of collective print stewardship.

This work is part of Stewarding the Collective Collection, a multi-part OCLC Research project exploring the operationalization of collective collections in a shared print context.<sup>1</sup> In addition to the findings of this report, OCLC has published an earlier study, conducted in collaboration with the Partnership for Shared Book Collections, of the scope and characteristics of print monograph retention commitments registered in the WorldCat database—an important source of operational intelligence for shared print programs.<sup>2</sup>

**Taken together, [the findings] provide timely, community-driven insights to help library leaders and staff understand and respond to a dynamic shared print landscape.**

# Data and methods

The analysis reported here originated in ideas that emerged from conversations with colleagues at the Big Ten Academic Alliance. OCLC Research refined some of these ideas and carried them forward independently as a research project. This project benefited from the support of the Statewide California Electronic Library Consortium (SCELC), which provided valuable assistance in raising awareness of the project and recruiting interview participants for the data collection process.

Data for this study was collected from:

- Nine individual interviews and seven focus group interviews (37 total interview participants) with shared print managers, library leaders, collection librarians, metadata librarians, and resource sharing librarians. Data was collected between November 2023 and April 2024.
- An online survey receiving 190 responses, conducted from June to July 2024. Survey respondents were affiliated with libraries participating in at least one monographic shared print program.

The focus of this work is monographic materials, so shared print programs managing journals or other forms of print materials were out of scope. Additionally, the project limits its attention to the US and Canadian shared print programs.

This report complements OCLC Research's long history of exploring collective collections from numerous perspectives.<sup>3</sup> Many of these studies address collective collections in the context of shared print, including:

- Analyses of the collective print monographic holdings of several major consortia.
- An exploration of regional print monographic collective collections to reimagine the geographical boundaries of shared print partnerships.
- A collaboration with the BTAA consortium on a study that offered recommendations for how BTAA could move toward greater coordination of their collective print holdings.<sup>4</sup>

Powered by the WorldCat database, OCLC's research is aimed at bringing collective collections to life and supporting their management and sustainability.

# Takeaways

Our conversations with shared print stakeholders, along with information gathered from the online survey responses, painted a rich picture of current perspectives on monographic shared print workflows, data, and tools. Some of the details we learned were distinct to the circumstances and practices of specific institutions or programs. But in examining the analysis as a whole, we identified several key takeaways. These takeaways form a broadly applicable assessment of where monographic shared print workflows are in their use of data and tools, and where investment should be prioritized to take them further. Anchored in the wisdom and experience of the shared print community, the takeaways discussed below offer insights for fostering community dialogue and informing strategic planning among stakeholders in the ongoing stewardship of the print published record.

**These takeaways form a broadly applicable assessment of where monographic shared print workflows are in their use of data and tools, and where investment should be prioritized to take them further.**

## Data is the key to delivering value to shared print programs

**What we learned:** Accurate and comprehensive data is essential for effective stewardship of collective collections, such as those managed by shared print programs. Monographic shared print programs involve six core workflow categories, with collection analysis, metadata management, and verification being the most data-driven—and in some cases, the most time-intensive—activities. The importance of data to shared print workflows is amplified by the fact that these programs primarily operate as distributed collections, requiring extensive coordination of holdings, retention, and bibliographic data across multiple partner libraries.

A significant operational challenge is data quality—inaccurate, incomplete, or incompatible data hampers workflow optimization and reduces confidence in collective holdings representation. Success in shared print programs heavily depends on precise intelligence about partners' holdings and retention commitments. Better data quality would not only improve confidence in collective holdings but also enhance local collection management capabilities. Prioritizing good data and tools to support data-driven workflows delivers clear value to stakeholders of the shared print program through optimized workflows and enhanced decision-making.

## Monographic shared print: Six core workflows



**Collection analysis**



**Discovery to delivery**



**Metadata management**



**Managing off-site storage**



**Verification**



**Program governance**

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### More details:

**1. Workflows supporting monographic shared print programs described by interviewees and focus group participants can be organized into six categories:**

- **Collection analysis**—analyzing holdings in support of collection management decisions: e.g., weeding, storage, determining contributions to shared print programs, and identifying last copies
- **Metadata management**—creating and updating cataloging data, setting retention commitments, and submitting/ingesting metadata in shared systems
- **Verification**—verifying that materials indicated by catalog data as held in the local collection are, in fact, in physical custody of the library
- **Discovery to delivery**—activities supporting the discovery, accessibility, and delivery of monographs in the shared print program collection
- **Managing off-site storage**—managing current operation of off-site storage facilities, such as staff allocation, environmental controls, and planning
- **Program governance**—participation in the operations of the shared print program itself, such as governance structures, committees, and policymaking

**2. Shared print is, first and foremost, a data-driven activity—collecting, organizing, and analyzing data about groups of collections. Workflows with high levels of data engagement were mentioned most frequently.**

- The most frequently mentioned workflow for all interviewees was collection analysis, followed by metadata management, and then verification.
- Survey respondents indicated that the activity they spend the most time on is creating and updating metadata.



**3. Shared print collections are often distributed across many local collections and exist only as data constructs, not as physically consolidated collections.**

- Many of the key monographic shared print programs mentioned by our interviewees (e.g., EAST, Hathi Trust, PBUQ) operate via a distributed model in which partner libraries retain, steward, and provide access to print monographs committed to the program.

**4. Shared print workflows depend on several key categories of data, including holdings, retention, and bibliographic data.**

- The primary source of value from data in current shared print workflows is precise intelligence on partners' print monographic holdings and what retention commitments have been placed on these holdings.
- Usage data (e.g., circulation data, ILL data, COUNTER data, etc.) is not used as extensively as other data categories but is often aspirationally spoken of as something that could bring value to shared print decision-making.

**5. The state of the data currently used in shared print workflows often makes workflow optimization challenging.**

- Inaccurate/non-current data was the survey respondents' most frequently mentioned data challenge; incomplete data and incompatible data were other significant challenges.
- Among survey respondents, the most frequently reported outcome of better data was that it would instill more confidence that the collective holdings of shared print partners are accurately represented. The second most reported outcome of better data was improved management of local holdings.
- In our interviews, retention data was by far the most frequently mentioned data type currently used in shared print workflows.<sup>5</sup> It was also the most frequently mentioned data type in terms of perceived data needs. For example, resource sharing librarians we spoke to noted that retention commitments are often invisible in resource sharing systems.

**Prioritizing good data and tools to support data-driven workflows delivers clear value to stakeholders of the shared print program through optimized workflows and enhanced decision-making.**

# Shared print tools should be integrated with local collection management workflows

**What we learned:** A critical gap—perhaps the most significant—in shared print workflows is the lack of integration between shared print tools and local collection management systems, forcing libraries to operate parallel workflows that limit information flow and efficiency. This integration challenge was identified as the top priority by both department heads and individual contributors, as it particularly affects collection analysis activities where standalone applications require separate data processing.

Better integration would directly address libraries' primary challenge of limited staffing by creating new efficiencies and reducing the burden of managing siloed systems. Tactics such as adopting common identifiers, interconnecting acquisition and shared print workflows, and ensuring visibility of retention commitments in resource sharing systems can help maximize the value of shared print participation while reducing its operational overhead. In contrast, siloed workflows and tools for local and shared print collections create inefficiencies, duplicative efforts, and barriers to data flows. Participation in shared print is part of local collection management; tools and functionalities should reflect this reality.

## More details:

### 1. The most significant perceived gap in current shared print workflows is integrating shared print functionalities and tools into systems for managing local collection stewardship.

- Shared print functionalities are too often separated from local collection management activities, leading to a need to operate parallel, “siloed” systems that strain limited local resources to operate and limit the flow of useful information across workflows.
- Integrating shared print with local systems was the top functionality need mentioned in our interviews and the most commonly cited workflow improvement need in our survey. Department heads/managers and individual contributors responding to the survey both emphasized this gap.
- Our interviewees frequently discussed integrating shared print and local systems in the context of the collection analysis workflow. For example, some collection analysis tools are standalone applications that operate independently of local management systems, requiring separate data loads and processing.

## **2. Integrating shared print workflow and decision support tools into local collection management systems—rather than operating in parallel—would improve efficiency and alignment.**

- Better integration of shared print workflows with local collection management workflows offers great potential for realizing new efficiencies, which connects back to a primary workflow challenge of participating libraries: staffing.
- Shared print workflow integration may also help in better aligning the local collection and the shared print collection. Potential connection points between shared print tools and local systems include common identifiers across systems, integration of the shared print collection with acquisition systems, and visibility of retention commitments in resource sharing systems.

**A critical gap—perhaps the most significant—in shared print workflows is the lack of integration between shared print tools and local collection management systems, forcing libraries to operate parallel workflows that limit information flow and efficiency.**

## **Collection analysis is already a key shared print workflow, but there is room to expand its scope and value**

**What we learned:** Collection analysis tools are one of the most critical and frequently used components of shared print workflows, generating strategic intelligence from overlap analysis and other forms of collection assessment. There are significant opportunities to expand these capabilities through improved comparative metrics, AI integration for predictive analytics, tools that provide ongoing, real-time collection insights, and enhanced analysis to identify complementary collecting patterns among partners.

Data-driven collection analysis is essential for addressing space management challenges (a frequently cited reason libraries join these programs), identifying subject or material specializations that highlight unique contributions to collective stewardship, and even supporting the preservation of rare or last copies. Continued development of robust collection analysis capabilities will be crucial for libraries to optimize their shared print participation and make compelling cases for program expansion or improvement.

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### **More details:**

#### **1. Tools supporting the collection analysis workflow were by far the most frequently mentioned in our interviews regarding current tool usage.**

- Collection analysis is a key component of organizing a new shared print program or joining an existing one.
- Interviewees mentioned a variety of tools currently used to support collection analysis, including GreenGlass, which was mentioned frequently; Choreo Insights,<sup>6</sup> which one interviewee described as, “from our perspective, probably one of the only tools that allows us to get in and do some analysis at a human level”; KNIME, which one interviewee described as an “emerging tool for overlap analysis”; and Gold Rush, an electronic resource management system developed by the Colorado Alliance of Research Libraries.

#### **2. There are opportunities to expand collection analysis capabilities in shared print workflows.**

- Analytics and decision support, in the form of clearly defined metrics (and the tools to produce them) for comparative collection analysis, was a top functionality need identified by interviewees.
- There was interest in adding AI capacity to shared print tools, which could augment collection analysis and provide suggestions or predictions that place local collections in the context of the shared print collection. One interviewee suggested that AI might expedite certain kinds of analysis, such as analyzing FAST headings to assess the diversity of a collection.
- It would be helpful to have the functionality to identify institutions within a specified region that collect certain types of materials.
- There was interest in shifting collection analysis tools from a model based on providing a one-time snapshot of a collection to one (perhaps offered through a subscription) where updated, “real-time” analytics could be accessed regularly as the collection evolves.
- Shared print program managers are a cohort that may particularly welcome benchmarking or dashboard-type data that describes the shared print landscape's current status and ongoing evolution.

### **3. Data-driven analysis can help identify contextual factors and incentives that highlight the value of collectively managing print collections.**

- Incentives to participate in shared print programs include a desire to contribute to a collective responsibility to steward the published print record and safeguard the last copies of print monographs.
- Local collection characteristics, such as specializations in subject matter or material types, could lead to important complementarities with the holdings of other partners.
- Management of physical space was the most frequently mentioned factor for joining shared print programs, highlighting the need for overlap/duplication analysis.
- Comprehensive, accurate data combined with robust analytic tools can help libraries identify untapped opportunities to create, expand, or optimize shared print efforts and make the case for shared print.

## **Tools and functionalities are needed to streamline workflows and fill gaps**

**What we learned:** Updating, exchanging, and cleaning data are key pain points in shared print workflows that new tools or functionalities could address. Streamlining data updates and providing adequate data cleaning tools are critical infrastructure needs for effective shared print participation, with shared print program managers identifying these as top pain points requiring group-level coordination and automated processes.

The absence of adequate tools is driving libraries to develop costly local workarounds, such as custom scripts for data cleaning, which can consume significant staff time and technical resources. Libraries also frequently rely on spreadsheets for core activities, such as tracking retention commitments and conducting overlap analysis, which creates operational risks due to decentralized, ad hoc data management practices. Replacing suboptimal local workarounds with reliable tools and unified data practices and standards could significantly reduce administrative burden and improve data quality, potentially freeing up staff time resources for higher-value activities.

**The absence of adequate tools is driving libraries to develop costly local workarounds, such as custom scripts for data cleaning, which can consume significant staff time and technical resources.**

### More details:

1. **Streamlining data updates through improved processes for exchanging data and ensuring that data is updated in a timely way is a significant functionality need. Another important need is the availability of data cleaning tools to prepare data for submission to shared print catalogs or databases.**
  - Streamlining data updates includes group commitments to unified data models, standards, policies, and guidelines, and automated processes for verifying and updating collection data.
  - Streamlining data updates seems to be of special importance for shared print managers, perhaps indicating that this is a pain point felt primarily in the context of a workflow centralized at the group level.
  - Data cleaning includes removing duplicate records, managing discrepancies across different metadata management systems, and correcting inaccuracies. For example, one interviewee emphasized the extra staff time consumed by using Python scripts for data cleaning before uploading—time that could be spent on other tasks.
2. **The lack of available tools in some shared print workflows leads to local workarounds and ad hoc solutions like spreadsheets.**
  - Several interviewees mentioned locally developed tools created to cover gaps in workflows; for example, one interviewee noted that “our metadata librarian . . . is trying to develop her own tool to help with record matching.”
  - Spreadsheets were frequently mentioned as a tool in supporting workflows, such as tracking retentions and performing overlap analysis. We have heard about this practice in other contexts.<sup>7</sup> This can create problems if the spreadsheets are maintained ad hoc, are not centrally managed, require additional workflow setup, and/or if spreadsheet data is not integrated into shared print systems.

## Challenging conditions impacting shared print workflows can be mitigated with data-driven and programmatic solutions

**What we learned:** Libraries participating in shared print programs face critical staffing challenges, which are amplified by the need to dedicate adequate personnel to labor-intensive activities such as verification workflows and managing retention commitments. Moreover, the lack of systematic coordination across different shared print programs creates inefficiencies and conflicts for institutions participating in multiple programs, particularly around competing retention policies and incompatible workflows. The absence of

a unified community of practice can lead to duplicated efforts, misaligned standards, and inequitable distribution of retention responsibilities across participating libraries.

Shared print program managers must balance centralized system requirements with the diverse operational configurations of individual participating libraries. While the chronic lack of staff and coordination—both within and across shared print programs—are formidable challenges, they can be mitigated with both data-driven and programmatic solutions. These solutions improve coordination between programs, establish common standards and workflows, and reduce labor-intensive activities through automation and integration.

### **More details:**

#### **1. Staffing challenges include insufficient staff with dedicated responsibilities for shared print activities and inefficient use of limited staff time by labor-intensive tasks.**

- In our interviews, the libraries participating in shared print programs were concerned about supplying sufficient staff to operate the technical infrastructure.
- The verification workflow was mentioned repeatedly in our interviews as costly in terms of time and staff effort. Verifying holdings and inventory data was the second most frequently mentioned activity performed by survey respondents, and it was the most frequently mentioned for respondents who identified as individual contributors.
- Setting or updating retention commitments and exposing them to partner institutions within a shared print program was flagged as a complex and labor-intensive activity.
- Discovering ways for programs, staff, and systems to interact with better coordination and clarity of communication can potentially unlock greater value from shared print efforts.

#### **2. There is little systematic coordination across shared print programs.**

- Inefficiencies and duplication of effort can occur when program-specific shared print priorities are established without reference to a broader view of the shared print landscape.
- Issues or conflicts can arise when an institution participates in multiple shared print programs, such as conflicts in retention policies and different practices, conventions, and workflows.

**While the chronic lack of staff and coordination—both within and across shared print programs—are formidable challenges, they can be mitigated with both data-driven and programmatic solutions.**



3. **There is an ongoing need for efforts to cultivate a shared community of practice in workflow organization, encourage the use of standards or conventions, and foster equitable distributions of retention commitments. A lack of this coordination capacity can cause inefficiencies and extra work.**
  - Shared print program managers often struggle to align centralized systems and workflows with a wide range of local operational environments in participating libraries.

## **Messaging and advocacy are needed to shift perceptions and secure support for collective collections**

**What we learned:** Collective collections offer great potential for optimizing stewardship, increasing access, amplifying library impact, providing enhanced capacities for smaller institutions, and diversifying collection content and library practices—all of which rest on collaborative foundations that extend the library beyond local scale. Monographic shared print programs, as stewards of collective collections, offer similar opportunities to achieve these ambitions. However, to do so, collective collections—and by extension, shared print programs—need to be viewed as a strategic stewardship priority that strengthens the library's value proposition. This requires compelling advocacy and communication strategies aimed at securing the necessary buy-in and funding from university leadership.

Data and analytical tools are critical for creating evidence-based messaging that demonstrates the value of group-scale resources to institutional stakeholders. Successful messaging can help move collective collections beyond a retrospective focus on legacy holdings toward a prospective model that embeds coordinated collection development into long-term strategic planning.

### **More details:**

1. **There is a need to shift institutional perceptions to view shared print as a stewardship priority and a strategy to strengthen the local library value proposition. This includes communication with senior university leadership, advocacy strategies, and compelling talking points to secure buy-in and funding.**
  - Data and tools are needed to support this messaging and advocacy.
  - The current environment suggests that budgetary pressures will only increase in higher education. Therefore, effective collection management through shared resources will be more important than ever, amplifying a shift from the “bought collection” to the “facilitated collection.”



- 2. Shared print programs—already dedicated to inclusive partnerships and resource sharing—can build on their collaborative foundation by diversifying collection strategies, remediating metadata/inclusive descriptions, and supporting smaller institutions.**
- Some interviewees indicated that promoting collection diversity goals through shared print was not a current priority, but they could imagine opportunities to do so in the future. Efforts in this area may be tied to a continuing evolution of shared print strategy from one that is retrospective in focus (i.e., focused on legacy print holdings) to one that is prospective (where future collection development becomes embedded in deeper coordination within collective collections).

**Successful messaging can help move collective collections beyond a retrospective focus on legacy holdings toward a prospective model that embeds coordinated collection development into long-term strategic planning.**

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## CONCLUSION

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Taken together, these findings highlight a perceived need to optimize operations across data, tools, and workflows in the shared print space. Improvements in efficiency, integration, and functionality—from data quality and comprehensiveness to workflow integration, tool development, and process streamlining—all point to opportunities to make monographic shared print programs more effective through stronger operational foundations. The key areas of opportunity for advancing operational optimization are:

- **Data-driven efficiency and integration**—optimize operations by leveraging data as a foundation for value delivery, integrating shared print tools seamlessly with existing local workflows, and expanding collection analysis capabilities to maximize their operational impact.
- **Workflow enhancement and bridging gaps**—develop tools or functionalities that address current workflow gaps and improve performance despite challenging operational conditions.
- **Strategic communication for operational support**—improve messaging and advocacy efforts to secure the stakeholder buy-in and support necessary for shared print activities.

As collective collections—such as those managed by shared print programs—are operationalized and move from concept to reality, they must be underpinned with efficient workflows to support their long-term stewardship. These three areas of opportunity combine to address operational optimization by strengthening data and technical foundations, improving workflow efficiency, and securing institutional support and resourcing for shared print. A shared perspective from the practitioner community, as reflected in the findings reported here, helps crystallize data and functionality needs and identify future development priorities. This is an important step in maintaining ongoing improvements and realizing new sources of value from monographic shared print programs.

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## NOTES

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For more information about the Stewarding the Collective Collection project, please visit: **[oclc.org/scc-data-project](https://oclc.org/scc-data-project)**.



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