MI-SPI 2.0 – Project Kickoff

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Agenda

- Introductions
- MI-SPI context
- Project overview including key decisions
- Timeline review
- Next Steps

Introductions

- Your name, library, and role

- What your library is hoping to get out of this project

- Your situation with regard to space and/or weeding needs? Is there any weeding going on now, or do you anticipate any needing to be done during the project?

- Your biggest concerns or unanswered questions about the project

MI-SPI CONTEXT

A few MI-SPI firsts

- First library to ever work with SCS: Grand Valley State University

- First shared print group project: MCLS pilot group (later MI-SPI)

- First group to use GreenGlass for Groups: MI-SPI 2015

- First group to do a second project and now a third project

MI-SPI Participating Libraries	2012	2015	2019	COMMITTED RETENTIONS
Baker College			X	-
Central Michigan	X	X	X	84,247
Eastern Michigan	X		X	*172,346*
Ferris State		X	X	28,416
Grand Valley	X	X	X	47,215
Kettering University			X	-
Michigan State			X	-
Michigan Tech	X	X		32,446
Northern Michigan		X	X	40,596
Oakland University		X	X	48,408
Saginaw Valley	X	X	X	15,048
Univ. of Michigan, Dearborn		X	X	35,378
Wayne State	X	X	X	100,278
Western Michigan	X		X	*169,795*

MI-SPI 2015 Retentions & Retention Model

774,173 title-holdings retained

MI-SPI 2015 Retention Model (Featured)   Un-feature...

Retain ALL if
- MI-SPI 2015 holdings fewer than 3
- Retained by EMU & WMU holdings equal to 0 (any edition)
- US holdings fewer than 50 (any edition)
- University of Michigan holdings equal to 0 (any edition)
- Michigan State holdings equal to 0 (any edition)

Retain 2 if
- MI-SPI 2015 holdings more than 2
- Publication year before 2005
- Retained by EMU & WMU holdings equal to 0 (same edition)

Retain 1 if
- MI-SPI 2015 holdings more than 2
- Publication year before 2005
- Retained by EMU & WMU holdings equal to 1 (same edition)

PROJECT OVERVIEW

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SCS Team & Roles

- Cynthia DuChane   Primary Implementation Manager
- Jimmy Kuckelheim   Secondary Implementation Manager
- Matt Barnes   SCS Director
- Andy Breeding   SCS Senior Product Manager
- Eric Redman   SCS Software Architect

- Argentic Software: Data loading team

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Shared Print Workflow
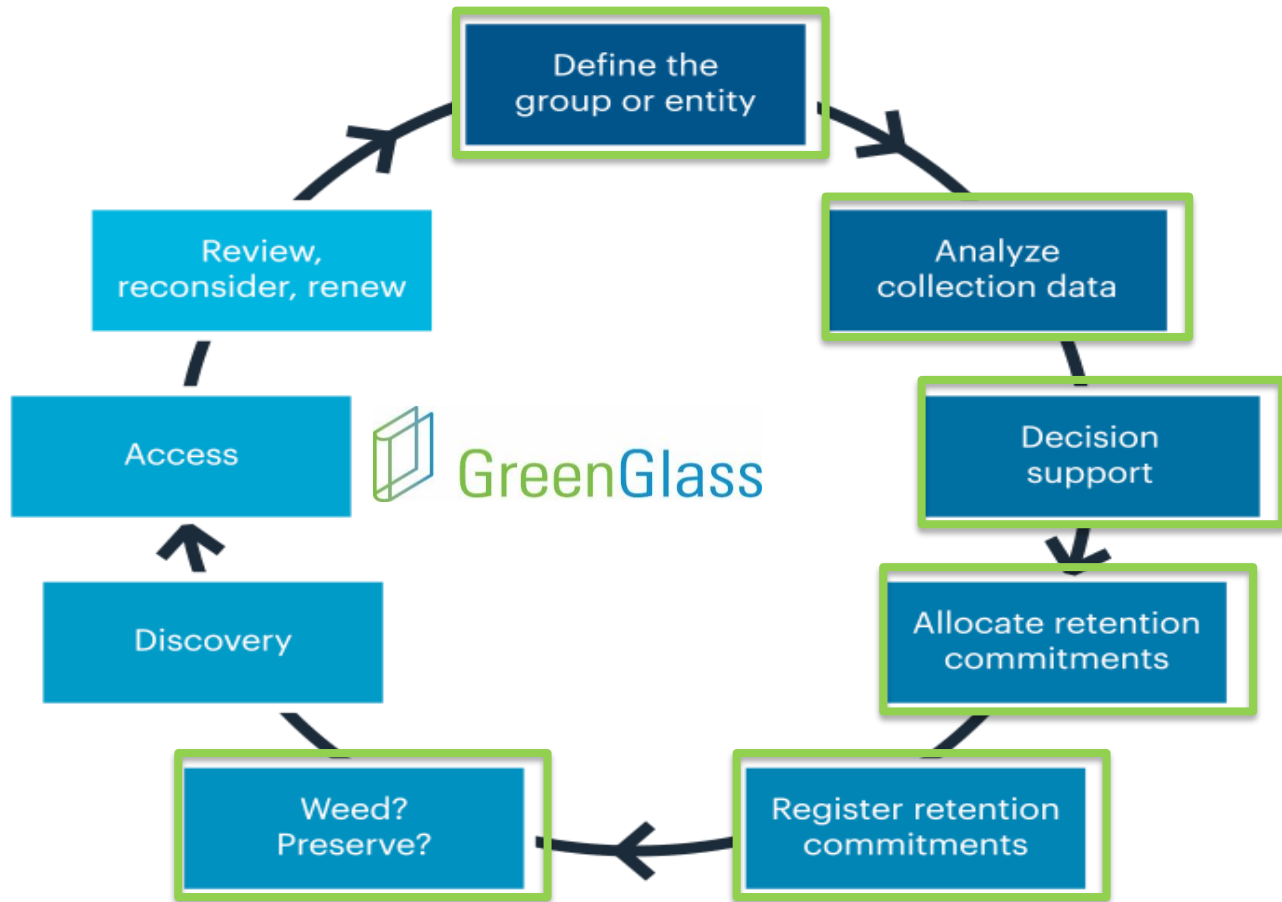
Project scope for group analysis and retentions

- **In Scope:** <u>circulating print monographs</u>
- **Out of Scope:**
  - Scores
  - Juvenile Literature
  - Serials/Journals (anything with a record type 's')
  - CDs, DVDs, Videos
  - Micro-formats/fiche
  - Reference books
  - Special Collections
  - Ebooks
  - Theses/Dissertations (except those classed in circulating collection)
  - Maps

Project Scope

What about…

- Reserve items?
- Item status codes or other type codes that indicate an item may be unavailable
  - Lost
  - Missing
  - Withdrawn
  - Billed
  - Non-circ

Project scope for individual library analysis

Individual libraries have the option to include additional materials not in-scope for group analysis.

- Scores (4 libraries)
- Government documents class in LC/DDC
- Theses (2 libraries)
- E-books (1 library)
- Juvenile literature (1 library)

SCS

OCLC WorldCat®

HATHI TRUST

CHOICE OUTSTANDING ACADEMIC TITLE

GreenGlass

Library's bib, item and transaction data for PRINT MONOGRAPHS

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Project Steps

- Data extraction and delivery
- Data cleansing, normalizing, matching, filtering
- Data loaded to GreenGlass
- Exploration and discovery via GreenGlass
- Libraries take advantage of GreenGlass Remediation Lists
- Experimentation with retention models
- Group-wide consensus on the group retention model
- Allocation of retention candidates – reload GreenGlass
- Review of retention candidates
- Opportunity for rejection of retention candidates
- Allocation of commitments – finalized in a third load of GreenGlass
- Local steps taken to protect and reveal retention commitments
- Safe and responsible deselection

COMPARATOR GROUPS

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Comparator groups

- All holdings for state and US libraries will be included

- Up to 6 more comparator groups for group use
  - View Tutorial (3 min)
  - Focus on primary ILL partners

- Individual libraries can specify their own separate comparator groups as needed

Questions that comparator holdings can answer

- How easily could we obtain a title if we no longer had it?

- Is a title held by one of our key lending partners?

- Is the title held elsewhere in a consortial or affinity group that we belong to?

- Is a title held by the major ARLs in our region? In the country?

Comparator group limitations

- They don't tell you what titles comparator libraries have that you don't have (gap analysis).

Other advice we usually give:

- Consider what decisions / actions will be supported by knowing the WorldCat holding count of a given group

- Extremely large comparator groups may not add much information to what you already have

Comparator Groups from 2015

- ALI (Academic Libraries of Indiana)
- University of Michigan (EYM)
- Michigan State (EEM)
  - now a participant so would not be needed as a separate comparator

If an individual library has a specific comparator group needed outside of those that are defined for the group we can accommodate. Please let us know if this is something you anticipate needing for your library.

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Comparator Groups – Additional Considerations

Are there existing retention commitments that you want represented? For example:

- Commitments from past MI-SPI participants
- Or all known SCS retentions

Special Category

A special category is title-level flag that identifies titles of local interest and in a group context titles that should receive special attention in retention decision making.

It is derived from meta-data available in your catalog extracts such as MARC tags, subject-headings, keywords.

Examples in group projects

- Titles of local/ regional interest (Maine, UNC, COPPUL)
- Ephemera (EAST)

Special category decisions

- Does the group want to use a special category flag?

- If so, who will take the lead in compiling the information SCS needs to configure such a flag?

Flexible Participation: what does it mean?

1. You can add materials for local analysis that are out-of-scope for the group

2. You can specify local comparator groups or a special category that are pertinent/visible only to your library

3. Once this data-set is built:
   – You will be able to remove weeded items and add or delete committed retentions in GreenGlass
   – Other libraries will be able to join MI-SPI without having to wait for the next full-group project

LIBRARY DATA WE NEED

Library Tasks

- Complete data and cataloging questionnaire
- Provide export table/map for item fields
- Provide a list of all in/out of scope:
  - Collection (branch/campus) and/or Location (shelving) codes
  - Item Statuses
  - Item/material types
- Extract and send your data to OCLC via FTP
  - Bib/Item data MARC binary (.mrc) or XML files preferred
  - Item/Usage data tab delimited preferred

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MARC records for circulating print monographs*

- Record type 'a' (print resource) in MARC leader byte 06

AND

- Bib level 'm' or 'a' (monograph or monograph part) in MARC leader byte 07

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All corresponding item and usage data

- Item and circulation data can be delivered in 9XX sub-fields of the MARC record in which case, we also need a mapping – so that SCS can know which data element will be found in each sub-field. (XML files are also fine).

- Item and circulation data can also be delivered in a separate delimited file. In this case, we need very clear (descriptive) headers, again so that SCS can know how each column is populated. Be sure that the associated bib record number is included for each item, so that we have a dependable match point.

- Sometimes, critical item data is in a MARC Holdings record (MFHD). If so, be sure to send them!

Exclude extract out-of-scope* titles

- Scores

- Juvenile Literature

- Serials/Journals (anything with a record type 's')

- CDs, DVDs, Videos

- Micro-formats/fiche

- Reference books

- Special Collections

- E-books

- Theses/Dissertations (except those classed in circulating collection)

- Maps

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Filter out from extract all materials out-of-scope for your library

(but err on the side of inclusion)

Item and circulation data

- item call number
- enumeration
- copy #
- barcode
- last check-in date *(optional)*
- last check-out date
- item create date
- item record number
- total checkouts
- in-house uses

- Collection code*
- location code*
- item type code*
- item status code*
- note field *(not required)*
- opac message *(not required)*
- last reserve date *(not required)*

* code keys also needed

Library Usage Data Decisions

- Is any in-house usage logged separately from standard ILS charges?

- Do you want to combine this and/or any other usage tallies with standard ILS charges to get total Recorded Uses?

Getting Started Help

- We are happy to schedule one-on-one time to meet with libraries to review the data questionnaire and individual questions

- Please contact Cynthia duchanec@oclc.org with suggested dates/times when you would like to meet

Your data is static. It's a snapshot.

- Avoid deaccessioning in-scope monographs
- Avoid relocation projects related to monographs
- Avoid major changes to the monographs collection

Until the group is ready to move forward
in a coordinated way, all participants should
minimize changes to inventory

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TIMELINE

High Level Timeline in the Project Proposal

1 May 2019	Library Data and Cataloging questionnaires distributed to members
15 May 2019	Deadline for all Library Data and Cataloging questionnaires submitted to SCS
June – Aug. 2019	MI-SPI members extract collection data and send to SCS
15 Sept. 2019	Deadline for all MI-SPI members' collection data files to be submitted to SCS
Sept. – Dec. 2019	SCS compiles MI-SPI members' files
Jan. – Feb. 2020	SCS analysis completed; retention assignments completed and shared with MI-SPI members

Proposed Project Timeline

Task		Timeframe
Kick-off Meeting		July 1
MI-SPI: Complete Cataloging and Data Questionnaire		July/August
MI-SPI: Decide on library comparators / "special categories"		July/August
MI-SPI: Supply bib, item, circ data extracts to SCS *(Deselection activity should cease after the extract is delivered)*		July/August
SCS: Compile and validate individual library data-sets		September to December
SCS: Compile MI-SPI group-wide database		December
SCS: Present MI-SPI data-set in GreenGlass / Training		December

You are here

Proposed Project Timeline

Task	Timeframe
MI-SPI: Develop retention scenarios & decide on retention model	January
SCS: Allocate retentions and reload GreenGlass w/retentions	January
MI-SPI: Review (and as needed) reject retentions (optional)	February
SCS: Remove rejected retentions and reload GreenGlass	February
MI-SPI: Individual libraries begin deselecting titles as needed	TBD
MI-SPI: Decide on retention disclosure, WorldCat registration	TBD
SCS: Ongoing data management (2 years after initial GreenGlass access)	

Timeline questions

For this group what are reasonable deadlines to set for:

1. Completed data and cataloging questionnaires?
   – Including lists of item codes indicating which ones are in and out of scope, both for group modeling purposes and for your individual instances of GreenGlass
2. Finalize comparator groups for the group?
3. Finalize special category specification (if desired)?
4. Deliver catalog extract

GREENGLASS OVERVIEW

For a comprehensive series of GreenGlass video tutorials go to:

http://www.oclc.org/sustainable-collections/resources.en.html#tutorials

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GreenGlass tutorials

Individual Library Features in GreenGlass

- What is GreenGlass? (2 minutes)
- Understanding Key Metrics (4 minutes)
- Collection Visualization (4 minutes)
- Item Lists and Item Details (4 minutes)
- GreenGlass Analysis (7 minutes)

Group Features in GreenGlass

- What is GreenGlass group functionality? (2 minutes)
- Embarking on a Shared Print Project with SCS (10 minutes) (NEW)
- Retention Model Builder (9 minutes)
- Title Sets, Title Holdings, and Items (3 minutes)
- Successfully Implemented Retention Models (12 minutes) (NEW)
- Post-Allocation Features in GreenGlass (4 minutes)
- Adjusting Retention Commitments in GreenGlass (8 minutes) (NEW)

Preparing for a GreenGlass Project

- Cataloging Questionnaire and Code Keys (5 minutes) (NEW)
- Your Library's Catalog Extract (8 minutes) (NEW)
- Establishing Your List of Comparator Libraries (4 minutes)

Brief Topical Tutorials

- Possible Duplicates (5 minutes) (Updated)
- SAME and ANY Edition Holdings Tallies (3 minutes)
- State and Country Holdings Tallies (3 minutes) (NEW)
- Multi-Edition Titles (3 minutes)
- HathiTrust Matches and URLs (3 minutes)
- Ebook/Print book overlap data in GreenGlass (6 minutes)
- Understanding Out-of-Scope Records (5 minutes)
- Combining GreenGlass Queries (4 minutes)
- Sharing GreenGlass Queries (2 minutes)
- Collection AND Location Codes in GreenGlass (3 minutes) (NEW)

For now, focus on:

1. Completing your questionnaire
2. Your 9XX sub-field map (if appropriate)
3. In/out of scope item type, status, collection and location codes

Send all these things to Cynthia DuChane

duchanec@oclc.org

Next up…delivering your extract – bib and item data via FTP

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Also ....

- Think
- Talk
- Ruminate

… on what would make this a successful project for your library.

What are your LOCAL goals, expectations, needs?

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Questions?

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Because what is known must be shared.SM