

## Developing a North American Strategy To Preserve & Manage Print Collections of Monographs

Agenda for the Workshop  
October 27-28, 2010  
Chicago, Illinois

*This event is made possible by a grant from the  
U.S. Institute of Museum and Library Services.*

### Wednesday, October 27, 2010

#### **8:45AM-9:45 AM: Plenary Session #1**

Refreshments & Greetings

Welcome from LYRASIS  
Timothy Cherubini, LYRASIS

Review of background document, schedule, and conduct of meeting  
Bob Kieft, Occidental College

Discussion  
Karen Schmidt, Illinois Wesleyan University; Workshop Facilitator

What is the status of existing cooperative projects for library materials, including emerging strategies, procedures, and policies; what can we learn from them, what do they suggest or what direction do they give us for a program for monographs?

OUTCOME: list of lessons learned and their possible application to the design of the framework.

#### **9:45-10:45 AM: Breakout Session #1**

Affinity Groups (University Librarians, Collections Officers, Consortial Leaders).

Discussion based on Topic A: What are the problems to be solved and what will be the impediments or facilitators of a solution? What are your main concerns about and goals for a nation-wide framework for monographs? What research or other work will need to be done to address the issues that monographs raise?

OUTCOME: lists of concerns and goals that will inform work on Topics B-E and that the framework needs to respond to.

University Librarians (Conveners: Ivy Anderson, California Digital Library & Mark Sandler, CIC)  
Collection Development Officers (Conveners: Bob Kieft & Timothy Cherubini)  
Consortial and research organization staff (Conveners: Lizanne Payne, CRL; Kim Armstrong,  
CIC; Emily Stambaugh, California Digital Library)

**10:30 – 10:45 AM: Break**

**10:45 AM-12:00 PM: Plenary Session #2**

Report out from affinity groups; synthesize plenary #1 and affinity group results, especially as they point to issues to be taken up in afternoon breakout sessions.

**12:00-1:30 PM: Lunch**

**1:30-3:30 PM: Breakout Session #2**

- Topic B: Describe the relationship between digital surrogates and print archive copies (Convener: Ivy Anderson)
- Topic C: What are the requirements for a bibliographic information/disclosure system that will support collaborative monograph archiving (Convener: Lizanne Payne)
- Topic D: What are the characteristics of service models and business models needed to sustain retention commitments and provide new modes of discovery and access to retained copies (Convener: Emily Stambaugh)

As part of the discussion, each group will note the research or demonstration projects needed to build and test a nation-wide framework for library cooperation on legacy monographs.

OUTCOME: preliminary description of the components of the framework as defined by Topics B-D; tentative list of projects and research that will be refined on Thursday.

**3:30 to 3:45 PM: Break**

**3:45 – 5:00 PM: Plenary Session #3**

Group reports from Breakout Session #2; identification of work that still needs to be done by each group; adjustment of Thursday agenda as needed.

**6:00 PM: Dinner (on your own)**

**6:00-8:00 PM: Steering committee meeting**

## Thursday, October 28, 2010

### **9:00-10:00 AM: Plenary Session #4**

Review of previous day; overnight thoughts

Discussion: What have been success factors and measures for large cooperative collections projects in the past; what will be the overall success factors and measures for a nation-wide project on monographs?

OUTCOME: groundwork laid for Topic E.

### **10:00-11:30 AM: Breakout Session #3**

Group work as suggested at end of Wednesday.

Group C: What are the requirements for a bibliographic information/disclosure system that will support collaborative monograph archiving (Convener: Lizanne Payne)

Group D: What are the characteristics of service models and business models needed to sustain retention commitments and provide new modes of discovery and access to retained copies (Convener: Emily Stambaugh)

Group E: Enumerate the components of a process for assessment of success of the framework that includes goals, milestones, and points to review and evaluate the strategy (based on plenary discussion) (Convener: Mark Sandler)

OUTCOME: description of the components of the framework that will feed the post-lunch discussion.

### **11:30 AM-12:00 PM: Plenary Session #5**

Group reports

### **12:00-1:00 PM: Lunch**

### **1:00-3:00 PM: Plenary Session #6**

- Summary/Synthesis of framework
- Identification of research needed
- Identification of potential demo projects and partners
- Next steps: Publicity/future communication; grant writing

### **3:00 PM: Workshop Adjourned**

## Friday, October 29, 2010

**8:30 AM – 1:00 PM:** Steering Committee meeting