‘Streamlined Collection Management using Categorisation: The Leeds Method and Practice’
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Selected slides from a presentation delivered by Chris to the National Acquisitions Group seminar on 15th May 2019, shared with his kind permission.

The Context: Leeds Categorisation

- **Heritage**: Excellent (rare & sizeable) subject collections to retain **AND** actively develop as strong University activity.
- **Legacy**: Excellent (rare & sizeable) subject collections to retain **BUT** growth incidental as not core University activity.
- **Self Renewing**: Solid but not unique collections of working material (not only textbooks). Maintain while Univ. active.
- **Finito**: Small collections not relevant to current University activity.

STAGE A: Practical

- **KEY**: Identified that **Heritage & Legacy = Retain**
- Assessing strength of PAST holdings (existing stock)
- Apply CCM Tool **PLUS** past activity as a Filter
- Some work generated new areas of investigation…
  …while others proved to be dead ends.
- Work was in context of site refurbishments & new builds
  (not an isolated or theoretical exercise)

STAGE A: Criteria used as a Filter for ‘Retain’

- **A1**: Reputation / Historic
- **A2**: Special Collections
- **A3**: Named Collections
- **A4**: Reference material
- **A5**: Full Classification - Rarity
- **A6**: Full Classification - Comparative Size
- **A7**: Sub Classification - Rarity
- **A8**: Sub Classification - Comparative Size
- **A9**: Rationalisation
- **A10**: Journals
- **A11**: Seminal Authors or Works
- **A12**: Individual item rarity
To January 2019

- Ruled on (largely) standard CCM thresholds and assigned 'retain' criteria to ranges of classmarks
  - Rarity: >= 40% of collection with <= 4 duplicates elsewhere in UK
  - Comparative Size: Leeds 3x more items in subject than other UK site
- Flagging item records within classmarks with (internal) tags for 'retain' and criteria used eg A1, A2 etc.
- Journals separately, including exhaustive parallel UKRR submissions (informed by the book categorisation)

STAGE B: Final Full Categorisation

- Focus not on Past but CURRENT University Activity
- Split analysis between STAGE A results...
  - Retain (Distinguish between Heritage v Legacy)
  - Other (Distinguish between Self-Renewing v Finite)
- Multiple criteria required for higher categories, not a filter eg must be University Active and proven (higher thresholds)

- Modelling and testing work is ongoing

STAGE B: Re-apply Criteria for Full Categorisation

- B1: Sci-Val analysis etc. Current University Activity
- B2: REF-RAE analysis Current University Activity
- B3: Rarity CCM Tool (BUT apply Higher thresholds)
- B4: Special Collections
- B5: Reputation / Historic

If RETAIN from Stage A, must have...
B1 or B2 AND satisfy 2 criteria of B3, B4 or B5 = Heritage,
otherwise subject = Legacy

If NOT RETAIN from Stage A must have...
B1 or B2 = Self-Renewing, otherwise subject = Finite