Collection Management: Share the Experience @ Royal Holloway, 11th June 2019

Collection categorisation breakout session: discussion summary (discussion brief is attached at the end)

Do we all have similar goals and drivers behind our categorisation of collections?
What decisions are we each trying to make on the basis of the categories we identify?

- Similar drivers were mentioned by multiple participants:
  - Managing space and improving student experience;
  - Showing value for money and prioritising work (eg cataloguing);
  - Demonstrating professionalism and providing justification for decisions (eg withdrawals, refusal of donations);
  - Supporting conversations with stakeholders outside the library (eg with academic colleagues);
  - Identifying 'special' collections for targeted promotion and collection development, "collections as assets versus liabilities"

A number of libraries have adapted the Leeds categorisation (Heritage/Legacy/Self-renewing/Finite). How similar are our categories? What local tweaks have been applied?

- There was a perception 'Leeds' style categories are widely applicable but with different weights for different institutions. E.g. teaching-led institutions tend to be more driven by reading lists, and tend to weed on the basis of usage. However disposal decisions only based on usage could dispose of flagship/heritage type material.
- General agreement that 'finite' does not automatically mean dispose straight away.
- If the main driver is relegation, categorisation doesn't have to be as comprehensive (retain/not retain) as it would for a full 'intellectual assessment' of the collections.
- One institution identifies 'flagship' items by author/organisation. Items can be in more than one category e.g. 'flagship' as well as 'teaching & learning'.

Many institutions are using categorisation as a way of distinguishing between collections for long term retention and collections which may be considered for disposal.

Is there any interest in a local/bottom-up approach to national monograph retention (e.g. flagging a local decision to retain certain items on NBK)?

How much trust is required before the local retention decisions of other institutions factor in your own decision making? What would encourage that trust?

- There was interest in sharing categorisation information more widely as a way of supporting retention and disposal decisions at individual institutions.
- Some common concerns were:
  - Inconsistent categories and definitions e.g. 'heritage' used to mean different things in different institutions. Common categories or consistent terminology would help, within consortia if not nationally.

  - Preference from some libraries for regional projects/coordination, in favour of national, to keep items accessible for library users in a geographical area.
  - Would there be a risk of multiple libraries withdrawing books at the same time if it was uncoordinated? National libraries won't help if it's a non-UK book.
  - It could help if some institutions took on responsibility for retaining stock in certain subject areas? How do you reliably know that an institution will retain the books it said it would?

Is there any useful application to electronic/digital collections?

- No one was currently applying them to electronic/digital collections, although there was some interest in this as an idea.

What data sources/tools/skills are needed for effective categorization, and are they readily available?

- Collection categorisation is not a quick task (can be labour intensive and slow work). It needs sustained effort and organisational will. Library moves are a common driver.
- Need to 'get your house in order' first, which could take months or years.
- Reliable data is key, and the staff skills to work with the data. However, even if it's not perfect, it's better than the alternatives (or not doing anything).
- Identifying your good copies of a book needs a visual check.
- Usage data for non-loanable material is a perennial problem. Research Reserves or stores can be useful for statistics, to prove usage or not.
- Qualitative as well as quantitative factors are important, and there's a role for more 'intuitive understanding' of the collections too.

Other comments:

- Should we include categorisation at the acquisitions stage – why is the material being purchased?
  Also resale prices could be a factor in categorisation (can you buy it again if needed?). What's the Amazon price?

Breakout session brief:

Breakout session – collection categorisation (50mins)

What do we mean by 'collection categorisation'?

The use of **qualitative** and **quantitative** data to evaluate a library's collections, and divide it into different categories which will then **guide decisions** relating to purchase, location, retention and preservation of the items in each category.

Aims of the session

Good practice/idea sharing session for those who are either already engaging in collection categorisation at their institution, or who are interested in the subject.

Lightning talks/case studies – Examples of how have different universities approached it

- Kevin Wilson (LSE)
- David Morgan (RHUL)
- Karen Thomas (Bristol)
- Written case studies from York and Leeds

Questions for discussion (in smaller groups of c10 people)

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