

## **SAA-ACRL/RBMS Joint Task Force on Holdings Metrics**

Conference call: 11 June 2015, 2:00-3:30 EDT

### **Present**

Martha O'Hara Conway; Adriana Cuervo; Rachel D'Agostino; Lara Friedman-Shedlov; Emily Novak Gustainis; Katie Rawdon; Cyndi Shein (recorder)

### **Absent**

Alvan Bregman; Lisa Miller; Angela Fritz (?)

**Purpose of meeting:** Discussion of category definition for digital/electronic material

### **I. Terminology for this category**

Digital, born-digital, or electronic? Records, resources, or materials?

Agreement to be as inclusive and flexible as possible resulted in decision to use the term **Digital Material** based on following discussion:

The term **electronic** was eliminated for the following reasons:

- Electronic is a form of energy rather than a format of material
- Various machines (not just computing devices) convey information electronically
- We may not use electronic means to access digital material in the future

The term **digital** was selected over **born-digital** as more inclusive (provides repositories with the option to count digitized material and derivatives).

The term **records** was eliminated as too narrow (and because of its longstanding association with the work product of organizations).

The term **resources** was debated at length, but ultimately rejected to avoid confusion:

- The term **resources** implies content that is available (a resource) for users
- Library system interfaces often use the term **electronic resources**, which are digital versions of published monographs or subscriptions rather than unpublished/archival material

The term **material** was agreed upon for the following reasons:

- The scope of **materials** is more inclusive than **records**
- Majority of the task force's previously defined categories use term **material**
- Selected singular of **material** to be consistent previously defined categories

### **II. Definition of Digital Material**

See Category definitions for decisions resulting from this conversation. The definition was crafted with the intention to be inclusive and flexible, enabling users of the guidelines to determine what types of digital materials are appropriate to count in their local environments.

Agreement was that the defining characteristic of this category is that the material in it is/can be counted in bits and bytes/binary code. It may also be counted in parallel by physical carrier (tape, disc, disk, server, hard drive, etc.); by number of titles; by number of files; etc. Someone expressed importance of allowing the count of DAT or DigiBeta in this category if desired by the repository. Distinction between born-digital, surrogates, and derivatives was acknowledged and included in definition.

### **III. Discussion about counting digital material separately vs as a subset of previously defined categories**

Decision to encourage counting of digital material in parallel with the counting of physical material in the previously defined categories (e.g. count digital images within the visual material category), while accommodating the counting of digital material separately as bytes (particularly for digital mixed media that cannot be accurately counted in one of the existing categories or for digital files of unidentified content/format).

Discussion about counting carriers vs bytes—the relevance of format vs content vs physical carrier kept coming up. Issue was raised about whether or not to count digital audiovisual material as audiovisual or digital material. Suggestion was made to count the material "as managed" rather than "as stored" (no consensus). Consensus is to keep the guidelines flexible enough to allow the repository to determine which category it chooses to use for various materials, as long as they only count each item once. Ability to report extent of physical carriers in parallel with bytes in current systems (such as ArchivesSpace) was pointed out. This is acceptable (maybe common) practice.

### **IV. Additional points**

- Nuances of how/why to count digitized vs. born-digital, versions, surrogates, derivatives, etc. may be addressed later in our process
- Acknowledged importance of getting feedback from testers of our guidelines before we can "tease out" areas that need clarification
- Recognition and acceptance that this category may diverge from the template we are using for other categories, due to the complexity of digital material
- Concern about reporting bytes for an archival version of a dynamic website were quelled:
  - Explanation that we capture a snapshot of a website (static size) at any given time
  - Likewise, counts of physical material change with each report—no counts are stable, they are always growing
  - Will rely on testing to reveal if we need to add specific directions for counting archives of web content

### **V. Next steps**

- Move on from creating draft category definitions
- Compare draft definitions to existing reporting techniques and terminologies
- Task force members to look at survey responses to inform/refine our draft definitions
  - What are they counting?

- What is their process?
- How do their categories map to ours?
- Outliers we need to address?
- All task force members should review the Smithsonian's survey response
- Emily will email next steps for tag-team reviewing of additional survey responses
- Emily will also email information on Yale's survey practices

**Notes:**

Few members are attending ALA, so there will be no working meeting at ALA in June. JFT members in attendance will use this as an opportunity to share our progress with others.

Lara will be off the grid until mid-July.