

# **SAA-ACRL/RBMS Joint Task Force for the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries**

## **Our Charge**

The SAA-ACRL/RBMS Joint Task Force for the Development of Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries (hereafter “Task Force”) is responsible for the development of guidelines (hereafter “Guidelines”) that will provide metrics, definitions, and best practices for quantifying the holdings of archival repositories and special collections libraries. The Guidelines will consider and address both the wide range of types and formats of material typically held—including analog, digital, and audiovisual materials—and the different ways collection material is managed and described. The Guidelines might also accommodate a two-tiered approach involving basic/minimum metrics and advanced/optimum metrics and/or include recommendations for institutions that wish to engage in collections assessment.

## **Our Tasks**

1. Determine the categories/types of collection material for which we will develop guidelines regarding metrics, definitions, and best practices for quantifying holdings.

- Archives and Manuscripts (managed as collections)
- Books and Other Printed Material
- Cartographic Material
- Digital Material
- Graphic/Visual Material
- Manuscripts (managed as items)
- Microforms
- Moving Image Material
- Objects and Artifacts
- Sound Recordings

2. For each category/type of collection material

a. Provide a definition; explain what it includes (or could or should include) and what it excludes (or could or should exclude); address potential problem areas, issues arising from variations in practices; etc.

b. Propose metrics, best practices, and/or guidelines for getting at the following three counts/measures:

- (1) bibliographic units (e.g. titles)
- (2) physical units (e.g. volumes, sheets, audiocassettes, film reels)
- (3) space occupied (e.g. linear feet, cubic feet, gigabytes)

c. Account for and address the need to distinguish

**(1)** Material managed and described at the collection level from material managed and described at the item level

**(2)** Material that has been described and is available for use from material that has not been described/is not available for use

**d.** Account for the different counting capabilities of the wide variety of archival repositories and special collections repositories constituting the SAA/RBMS memberships (for example, staffing) and the types counts required and/or desired by individual repositories.

**3.** For all of the above, keep in mind the following:

**a.** How we are counting/measuring – ways to count/measure/get numbers:

- generate a report (from a catalog, database, archival collection management system, etc.)
- do an actual/physical count/inventory (of containers, volumes, items, etc.)
- get an actual/physical measurement (of [floor, shelf, online, etc.] space occupied)
- track and tally (accretions, additions, deaccessions, withdrawals, etc.)
- sample and extrapolate (volumes per shelf, items per container. etc.)

**b.** Why we are counting/measuring – reasons for counting/measuring/getting numbers:

- for collection management purposes (inventory/security, insurance/risk management]
- for space planning purposes (including transfer to offsite storage facilities, facility renovations, and repository mergers)
- for formal (e.g. ARL Statistics) and informal (e.g. the OCLC survey) reporting needs, including aggregated reporting across multiple repositories at an institution or to ensure institutional compliance (such as IPEDS)
- to inform broad/general-purpose statements about holdings, collection strengths, etc.
- to inform cataloging, digitization, processing, rehousing, and other activities/initiatives, including those that are collaborative and/or grant-funded