

Minutes for October 1 meeting of the ACRL-RBMS/SAA Joint Task Force on Standardized Holdings Counts and Measures, prepared by Rachel D'Agostino

The task force met via conference call to discuss reporting levels. Level 1 (minimal) was the focus of the discussion, our first on the topic.

It was explained that Level 1 is premised on the fact that counts should be made of holdings in whatever way those holdings are managed, whether as items or groups. Furthermore, in addition to the number of intellectual units, there needs to be a count of physical units – number of volumes, boxes, drawers, etc., rather than titles.

The group discussed whether or not we are advising on counting unprocessed collections. There were strong positions expressed both for and against the inclusion of unprocessed collections, or of collections not discoverable online.

The concern was expressed that if data gathered according to these standards were aggregated, it would be inaccurate if institutions counted materials at different stages of processing and discoverability.

It was stated that counting physical space/units might be more difficult if the count is limited to processed items, whereas an intellectual count might be much easier to limit in this way. A Level 1 intellectual unit count would be based on catalog records, whether created or not - this count would be a count of things that would warrant a catalog record. One record would equal one item in a Level 1 count.

The matter of discoverability was discussed briefly, with the clarification made that the level of processing an item has received does not necessarily correspond to its discoverability online.

The discussion of whether to count unprocessed materials was tabled and it was decided that the standards will instruct people to clearly state what they are reporting, in regard to its stage of processing.

Looking at the spreadsheets, it was noted that the Level 1 sheet is not tabbed out like Levels 2 and 3. It was explained that this was because we were not going to guide people on counting in separate formats in this level. The thinking was that Level 2 would be the first level in which we would separate categories of materials. For Level 1, an intellectual unit count would include all formats (object, archives, etc.) based on what would warrant a catalog record.

This was discussed and it was decided that we would break out Level 1 into the different formats.

**ACTIONS:** Emily offered to circulate some examples of what we discussed, i.e. some examples of things we think will count as one item. Further, it was decided that each of us would go through the categories to provide additional examples of what we each think would warrant a count of "1" in every category we can speak to. Emily offered to create a spreadsheet into which we can add these

examples and additional thoughts on each category's Level 1 item count examples. The results will be discussed at the next meeting, to be conducted via conference call, on 10/21 at 12:00 Eastern time.