

RBMS/SAA Joint Task Force (Standardized Holdings Counts and Measures)

Notes from our 2 March 2017 Meeting

Attending: Martha Conway, Adriana Cuervo, Rachel D'Agostino, Lara Friedman-Shedlov, Angela Fritz, Emily Gustainis, Haven Hawley, Lisa Miller, Katy Rawdon

We continued sharing our lingering concerns, nagging questions, unresolved issues, etc. regarding the Level 1 Count. It is essential that we are all on the same page regarding the Level 1 Count before we can (1) address the feedback we have rec'd regarding the Level 1 Count and/or (2) begin to articulate a Level 2 Count. Martha and Emily captured our "pain points" and will share shortly.

Conversation #1

In response to concerns expressed by some of us regarding actual or anticipated difficulties with categorizing collection material for purposes of (1) counting Titles Held and (2) measuring Physical Space Occupied:

These are likely to be the most frequently used categories, and we need to add wording to the guidelines to make this very clear and to (hopefully) alleviate some anxiety/confusion:

Archives and Manuscripts (managed as collections)
Manuscripts (managed as items)
Books and Other Printed Material

We should make it clear that "Archives and Manuscripts (managed as collections)" can and should be used for any/all flavors and varieties of "mixed materials" collections. Repositories should be encouraged to use other categories according to need or desire.

There was a brief discussion about possibly having these three categories as "required" with the other categories as optional. This idea was discarded; we just want to recognize that these are the big/main three and encourage their use as such.

Conversation #2

In response to concerns expressed by some of us regarding actual or anticipated difficulties with categorizing collection material for purposes of determining "digital space occupied" or "gigabytes managed":

2a. How does or should this count/measure related to other counts/measures (Titles Held and Physical Space Occupied)? We could offer the option of repositories counting digital materials in one number (space occupied of all digital collection materials managed) if repository isn't able to or doesn't want to categorize, with the understanding that the primary option (categorizing digital materials in the appropriate category in the same way as physical materials) is aspirationally preferred.

2b. Discussion of whether or not to count bytes currently on physical media but that will likely be someday migrated to server space, or some other "permanent" storage. Need to distinguish what we numbers we can provide about digital/stuff in gigabytes because we have "opened the box" from what we don't know (yet) because we haven't opened the box yet. Decision was to tell people NOT to count un-migrated bytes. This would be a level 2 count. We need wording to make this clear in the guidelines.

2c. Need to distinguish "digital content on physical media intended to be maintained on that physical media indefinitely" (such as commercially-available sound recordings on CDs and moving-image material on DVDs) from "other" digital on physical media (e.g. Word documents on floppy discs).

- digital content on physical media intended to be maintained on that physical media indefinitely: occupies physical space but not digital/virtual space
- digital content on physical media that has been or will be moved/migrated to servers/a "managed digital preservation environment:" occupies physical space and [now or eventually] digital/virtual space

We talked about what to count as "digital" -- is the repository managing the content in some way a digital form?

"Files have been moved to/content is stored in some kind managed preservation environment"

2d. Further discussion on determining what digital materials are collection materials versus surrogates. Decision continues to be that if a repository accessions the materials into the collection, it is collection material. This may vary by repository, but we cannot dictate what repositories accession or consider collection materials. We should include wording in the guidelines that makes clear this accessioned versus un-accessioned a.k.a. surrogate/use copy versus collection materials dichotomy. We also need to define terms such as surrogate, derivative, reproduction, copy, use/access copy, backup copy, preservation master, etc.