

**SAA/RBMS Joint Task Force on Holdings Counts and Measures
Meeting Minutes
2014-09-17**

Present: Alvan Bregman; Adriana P. Cuervo; Rachel A. D'Agostino; Angela Fritz; Lara Friedman-Shedlov; Lisa K. Miller; Katy Rawdon; Cyndi Shein; Martha O'Hara Conway (Co-Chair); Emily R. Novak Gustainis (Co-Chair)

Absent: n/a

First Task

- Meeting opened with a discussion of JTF members' accounts of how collections are measured at their institutions
- Some members were both appalled and relieved to learn that they were not alone in the lack of holdings reports at their institutions

Survey/Inventory

- Some members are currently engaged in collection-wide inventory/survey [Cuervo, Rawdon]
- Inventory/survey at sites discussed are primarily focused on measuring containers (box, etc.), not the intellectual content
- Discussion of what is meant by the term "collection" (discrete body with same provenance?)
- Request for members to share their homegrown survey plans/templates

Consensus was that the JFT needs to provide some type of survey guidelines as part of our output. We need to communicate what should be counted/measured and how to count/measure it when conducting a survey.

Group recognized that institutions may have to report counts in different ways to the various bodies to which we are accountable. Was suggested that if the dimensions of containers are precisely measured and recorded, then one can apply a formula to the container count to transform it to any unit of measure (feet, meters, cubic, linear, etc.) to meet reporting requirements for specific agencies. Parallel statements of extent may be appropriate.

Group discussed how complex/difficult counting and measuring becomes for material that cannot be measured by box--such as folders, flat files, and AV material. For example, Katy recognized that measurements for AV containers do not reflect the total running time (TRT) of the content. Knowing the TRT provides some indication of the time and money it will take to convert and/or process the actual content.

Why do we measure collections? What is the purpose? [JTF needs to address]

- Angela: Different managers adopt different methods for different reasons. As our professions have adopted standards/schemas (DACS/ EAD) and collection management systems, we've adapted our counts to work with these standards, schemas, and systems.
- Katy: As a cataloger, she needs to know how to express extent in MARC. Group recognizes value of multiple parallel statements of counts and need to know how to express extent.

Group agreed that best practice is to measure the physical space the collection occupies as well as the intellectual content [need to scope intellectual content].

Lisa: First focus of group should be to identify the purpose/reason we count things. Might be helpful to also address the problems we've encountered while trying to count things, so our guidelines can take these challenges into account. (Group agrees.)

Issues:

- Multiple systems used for collection management and recording information. Information can be distributed in different systems based on material type (i.e., Cyndi reported that Special Collections rare books/volumes are counted in an ILS by one department, while collections/archives are counted in a database by another department at UNLV)
- How do we know we're comparing apples to apples even in a single system at a single institution? For example, sometimes the item record represents a single item, but sometimes it represents multiple items (volumes in a single title)
- Need to address challenge of measuring multiple material type

The group agreed that individual reports (by JFT members) based on material type needed as a starting point.

- Martha suggested OCLC report, "Taking Our Pulse," formats and that we remain mindful of the difference between item-level and collection-level counts.
- Alvan suggested using material type list and standards that govern specific material types from DACS as a starting point for material types.
- Angela expressed concern about trying to create a "list" of material types given the wide variance of formats and how differently we measure them. She suggested subgroups for each type of format.

The group agreed that individual reports (by JFT members) based on material type would set the stage for how we formulate questions we want to ask the community in our survey.

Emily asked whether or not we should ask a few other institutions to participate in our initial "list" to include some other non-academic library perspectives, such as institutional archives, genealogical societies, historical societies, etc.

One member stated she was reluctant to go beyond the JTF at this point in our research, stating that we have a wealth of information and variety represented in the JFT. (Group agreed)

Group discussed using the term "Levels" when referring to degrees/intensity/details/scope of what gets counted and how; it was agreed that using the terms (from DACS) "minimal," "optimum," and "added value" are more appropriate than Level 1, 2, 3. Group agreed that minimal = measuring the space occupied (whether on a shelf or on a server) by the material. The next step/level would be measuring the intellectual content [collection count].

Methodology: How to create individual reports on each format?

1. Examine the ten responses in the First Task. Use the responses to flesh out the individual reports on each format--details of how to count each format.
2. Include various standards relevant to measuring each format
3. Begin with DACS list of companion standards to see how the specialized communities (such as AMIA for AV) recommend measuring that format
 - a. Break down and address sub-types of each material (for AV that would include finer details of audio, video, analog, digital...)
4. Include purpose of standard/method for measuring this format/material type

The group returned to the question as to why we are measuring collections/material. Different needs will require different methods (space vs. workflow/processing time vs. how much content available for researcher). This question is pivotal to the development of our guidelines.

Emily mentioned that one communal purpose/need/reason for measuring collections is to aggregate holdings counts from across various repositories—to have one place where all repositories are measuring the same thing in the same way. Usually this is done by reporting based on our only common denominator...the footprint (amount of physical space) the space the materials occupy. This may, in fact, be the basis of the "minimum" standard we express in our guidelines and if so, we need to be clear about the objective of the minimum standard. The minimum standard must meet the most basic need of the largest number of repositories.

Action items:

1. Martha will follow up with Amy re: JTF announcement
2. Anyone who has local/homegrown survey guidelines should share them via Google drive
3. Martha will post OCLC and ARL survey definitions to Google drive
4. Martha to create Google doc for group to collaboratively build list of reasons/motivators for "why we count"
5. Martha will send out a Doodle poll ASAP to determine next meeting date (members' schedules booked weeks/months in advance)
6. Emily will be responsible for contacting notetaker for next meeting using A-Z list
7. Emily will create test template that will serve as example for the individual reports on formats. Chose complex/richest format that will yield the widest variety of information/categories/challenges. Template to include:
 - a. Summary of findings for group work
 - b. Standards that govern each format
 - c. Controlled vocabulary preferred for each format
 - d. Unit of measure (inches, feet, bytes, volumes, rolls...) appropriate for each format