

Selected slides from a presentation delivered by Chris to the National Acquisitions Group seminar on 15th May 2019, shared with his kind permission.

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The Context: Leeds Categorisation

- **Heritage**: Excellent (rare & sizeable) subject collections to retain AND actively develop as strong University activity.
- **Legacy**: Excellent (rare & sizeable) subject collections to retain BUT growth incidental as not core University activity.
- **Self Renewing**: Solid but not unique collections of working material (not only textbooks). Maintain while Univ. active.
- **Finite**: Small collections not relevant to current University activity.

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STAGE A: Practical

- KEY: Identified that **Heritage & Legacy = Retain**
- Assessing strength of PAST holdings (existing stock)
- Apply CCM Tool **PLUS** past activity as a Filter
- Some work generated new areas of investigation...
...while others proved to be dead ends.
- Work was in context of site refurbishments & new builds
(not an isolated or theoretical exercise)

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STAGE A: Criteria used as a Filter for 'Retain'

- A1: Reputation / Historic
- A2: Special Collections
- A3: Named Collections
- A4: Reference material
- **A5**: Full Classification - Rarity CCM Tool
- **A6**: Full Classification - Comparative Size CCM Tool
- **A7**: Sub Classification - Rarity CCM Tool
- **A8**: Sub Classification - Comparative Size CCM Tool
- **A9**: Rationalisation CCM Tool
- A10: Journals UKRR informed
- A11: Seminal Authors or Works
- A12: Individual item rarity

To January 2019

- Ruled on (largely) standard CCM thresholds and assigned 'retain' criteria to ranges of classmarks
 - **Rarity:** >= 40% of collection with <= 4 duplicates elsewhere in UK
 - **Comparative Size:** Leeds 3x more items in subject than other UK site
- **Flagging item records within classmarks with (internal) tags for 'retain' and criteria used eg A1, A2 etc.**
- Journals separately, including exhaustive parallel UKRR submissions (informed by the book categorisation)

STAGE B: Final Full Categorisation

- Focus not on Past but CURRENT University Activity
 - Split analysis between STAGE A results...
 - **Retain** (Distinguish between Heritage v Legacy)
 - **Other** (Distinguish between Self-Renewing v Finite)
 - Multiple criteria required for higher categories, not a filter eg must be University Active and proven (higher thresholds)
- *Modelling and testing work is ongoing*

STAGE B: Re-apply Criteria for Full Categorisation

- B1: Sci-Val analysis **etc.** Current University Activity
- B2: REF-RAE analysis Current University Activity
- **B3:** Rarity CCM Tool (BUT apply Higher thresholds)
- B4: Special Collections
- B5: Reputation / Historic

If RETAIN from Stage A, must have...

B1 or B2 **AND** satisfy 2 criteria of B3, B4 or B5 = **Heritage**,
otherwise subject = **Legacy**

If NOT RETAIN from Stage A must have...

B1 or B2 = **Self-Renewing**, otherwise subject = **Finite**