

Developing a Collection Evaluation and Retention Policy

Presenters: Annie Bélanger and Ben Robinson
Dana Porter Library, University of Waterloo
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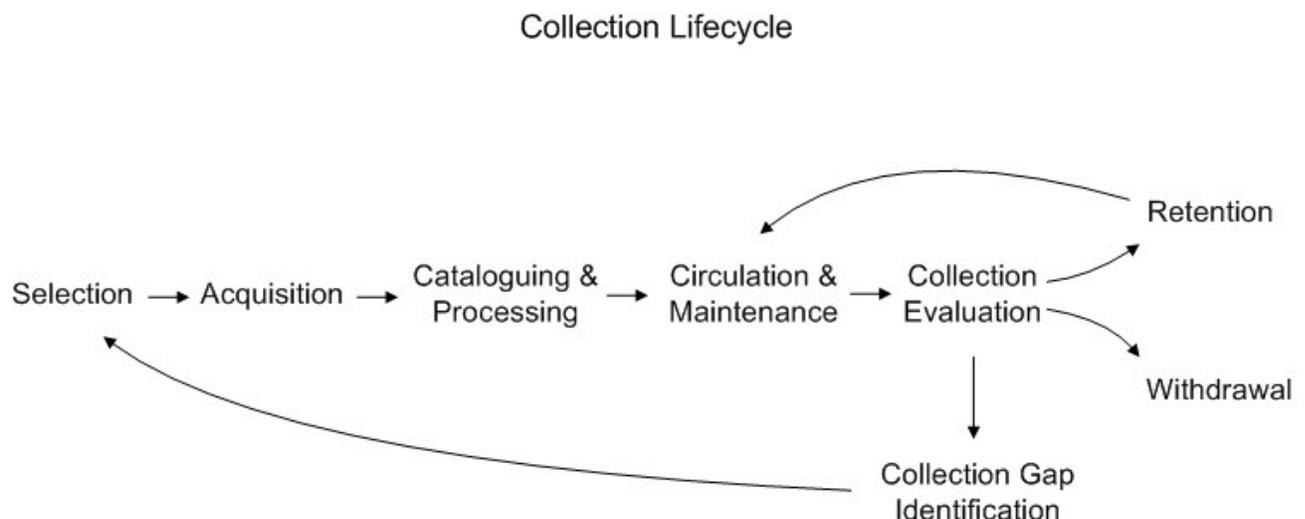
The Need for Evaluation and Retention

Collection evaluation is commonly perceived as a task that requires a great deal of time. However, finding the time to perform collection evaluation:

- Strengthens decisions regarding the lifecycle of a collection
- Ensures that individual collections encompass materials that effectively meet the changing research needs of its users
- Gives opportunity to identify and remedy a collection's weaknesses
- Exhibits proactive engagement with a collection
- Helps maintain liaison librarians' accountability to users, academic departments, and stakeholders

Collection retention is an integral part of the collection lifecycle by:

- Creating a bridge between collection development activities and withdrawal of materials
- Validating collection development principles through collection evaluation activities
- Ensuring strategic collection maintenance and review over time



Why Create Retention Policies?

Collection retention policies lead to effective and responsible decision making in the form of strategic withdrawal action by explicitly identifying necessary materials to be retained in a collection over the long-term.

The implementation of subject-specific collection retention policies will foster a number of visible outcomes. Retention policies will:

- Institute an efficient, streamlined collection evaluation process that can be carried out on a regular basis, in a manageable manner, by all liaison librarians. Focusing on retention will efficiently structure the withdrawal review process
- Promote a proactive approach to collection retention and withdrawal that facilitates continuous review rather than a reactionary and defensive “crisis management” approach applied only when required
- Directly address the often unique long-term research needs particular to individual collections
- Provide personal incentives for liaison librarians over the long-term by saving them considerable time and effort as well as by assuring that their collections are perpetually relevant to the students and faculty using them
- Improve communication among faculty in regard to collection maintenance.

Collection Evaluation & Retention Toolkit

The aim of the toolkit is to provide liaison librarians with simple, step-by-step guidelines for writing subject-specific collection retention policies.

The toolkit includes:

- An explanation of the need for retention policies
- Instructions for preparing to evaluate individual collections
- A breakdown of evaluation methods and tools
- Instructions for preparing subject-specific collection retention policies using the collection retention policy template
- Next steps in collection maintenance
- A list of helpful readings, links, and resources

The toolkit is available at: <http://subjectguides.uwaterloo.ca/evaluation>.

Contact

Annie Bélanger
Head, Information Services & Resources
Dana Porter Library
University of Waterloo
Annie.belanger@uwaterloo.ca