

Collection storage strategy

Scope of storage strategy

'Storage' is considered to be all locations where Libraries' collections are kept. It includes open shelving, closed library stacks and off-site storage but it excludes temporary holding areas and processing spaces. This broad definition of storage reflects the nature of the Bodleian Libraries system and the interplay between library sites and off-site stores. It mirrors the Museums' perspective where storage is considered to include remote off-site storage, city "off-site" storage and on-site museum storage.

Storage includes logistics, handling, management and all associated activities relating to the storage and movement of library collections. In the Libraries' service-based environment, storage is only effective if the collections stored are available and accessible to readers so storage encompasses all activities that enable a collection item to be made available at a service point.

Bodleian Libraries

There are 28 libraries in the Bodleian Libraries system. Each library stores collections relating to its purpose and they are selected based on several considerations, which are described in the Guiding principles below.

Collections are typically stored on open shelving, accessible to readers, or in closed stacks where access is mediated. A list of libraries with closed stacks is included in the appendix.

The principal off-site store is the Collections Storage Facility (CSF) at South Marston, Swindon. This large-scale, warehouse operation opened in 2010 and currently stores over 11 million collection items in a controlled environment to British Standard BS5454:2000. Readers access the collections by ordering them on the Libraries' catalogue, SOLO. Twice daily deliveries are made to the main libraries in Oxford, with smaller libraries receiving deliveries once a day. In total there are 21 delivery points.

Guiding principles

1. The storage location of library material is determined by Collection Management policies, usage, handling considerations, security, preservation needs and cost. Selection decisions are based on Collection Management policies.
2. Storage strategy is informed by consultation with users. This is achieved through consultation with academics at termly Committees on Library Provision and Strategy (CLiPS), through reading-list provision, multiple online and printed feedback channels and subject librarians' knowledge and interaction/networking with users.

3. Special collections material and material held for permanent retention should be held in conditions that meet required national and international standards. Collection items at the CSF are stored in a controlled environment to British Standard BS5454:2000. [NB this has now been superseded by the new standard BS EN 16893:2018 Conservation of Cultural Heritage.]
4. Consideration must be given to a variety of security issues including inclusion of security tags in books, access gates, library card access to particular libraries and library opening-hours.

For security reasons, special collections material is held in closed stacks with the exception of Duke Humfrey's Library.

Access to closed stacks is restricted in order to control access to the collections. Only authorised staff can access collections directly and the ordering system provides an audit trail for items fetched for other groups of staff and readers.

5. Higher use material is held on open access shelving, where possible, allowing for browsing by readers. Some higher use material, in demand at multiple sites, may be held remotely for more efficient shared access.

Some collection items may cross subject areas so shared access can be achieved by storing these items off-site and delivering them where required. The principle is to bring the item to the reader rather than send the reader to another library to provide access to it.

High-use material can be identified by usage statistics, inclusion on reading-lists, high use textbooks and important reference works plus subject librarian knowledge.

6. Lower-use material is held more remotely from libraries, where storage costs are lower.

Estate and infrastructure costs are lower outside of Oxford. Economies of scale are achieved by storing a large number of items in a single location. By storing lower-use material off-site, space is made available in the library for material that is either perceived to have higher use and/or selected based on a collection management decision.

7. Reference material that is low use can still be on open shelf access where this is deemed to be the most suitable location.
8. All material in remote off-site storage can currently be called to most libraries. The flexibility of the delivery system enables collection items to be made accessible in 21 of the libraries in the Bodleian Libraries system.

9. All library material is held in good quality storage conditions to ensure adequate preservation. This enables continued access to the collections in the long term. We are legally obliged as one of the six Legal Deposit Libraries to continue to preserve legal deposit material as an archive of national published output for the use of future generations.
10. The Bodleian Libraries aim to retain one copy of every acquired item for preservation. It is anticipated that any decisions made regarding the retention of non-legal deposit material will be informed by the relevant collection management policies and in consultation with academic colleagues as appropriate.
11. The temporary retention of material for reasons of short-term need or in cases where there are insufficient resources to adequately process the material should be formally managed. Temporary retention can be considered by the Movement Management Group (MMG) with a decision to be made by the Collection Management Strategy Group on exceptional requests only. See the Collection Management policy for disposal, retention and transfer for guidance.
12. All material should be accurately described, recorded and locatable through accurate inventory tracking systems. The library management system provides descriptive and location information for the majority of collection items. Other analogue finding aids exist for some collections items. Items stored in the CSF are controlled by the warehouse management system BSFIS.
13. Good storage requires good record-keeping to ensure consistent monitoring of usage, fill-rate and capacity. To make effective use of storage, growth is accurately modelled and tracked. An appropriate and consistent methodology is applied for all collection surveying and reporting activity. The fill of the CSF is monitored on a quarterly basis and this information informs modelling to predict the future fill of the warehouse. We know that an assessment of the space in the libraries has been undertaken and we need to look at how to track this data.
14. The cost of storage should be considered when determining retention periods or designing storage systems.
15. Collection management policies will be applied to material transferred to the Collections Storage Facility:

“The Collections Storage Facility is intended for the long-term retention of unique copies of materials acquired and, for reasons of space management and financial efficiency, the Bodleian Libraries will ensure that material transferred to the facility does not normally duplicate material already stored there by other Bodleian Libraries. Additional copies of material may be stored on an exceptional and normally short-term basis by agreement with the Collection Management Strategy Group.

Applications for exception in principle including indication of numbers involved will be made to and assessed by the Movement Management Group (MMG); significant exceptions will be referred to the Collection Management Strategy Group by MMG. The Bodleian Libraries should manage their space locally by regular weeding exercises taking-into-account the above which is taken from the “Collection management policy: disposal, retention and transfer”.

Revision history

Drafted by Ann Evans, Toby Kirtley, Michael Williams, May 2017

Updated by Ann Evans, Michael Williams, November 2017

Updated by CDG, March 2018

Approved by CMSG, June 2018

Updated and approved by CMSG, November 2023

Appendix – Closed stacks

The following list shows all libraries in the Bodleian Libraries systems that have closed stacks. This list does not include reading/seminar rooms in libraries where there are locked bookcases

- Vere Harmsworth Library: Stack
- English Faculty Library: Rare Books Room
- Music Faculty Library: Reserve Stock Room
- Art Library: Archive Room*, Rare Books Room
- Taylor Institution Library: Rare Books Room, section of West Basement*

*(plan to resolve when time allows)

