

Collection management policy: special collections



Mission: Advancing learning, research, and innovation from the heart of the University of Oxford through curating, collecting, and unlocking the world's information.

1. Terms of Reference

This document provides an overview of the basic principles and procedures governing the management of special collections within the Bodleian Libraries. The policy should be read in conjunction with the Libraries' overall Collection Management Policy and may be amended and revised from time to time.

2. Overview

The Bodleian Libraries' special collections have been developed since the late sixteenth century, pre-dating the establishment of the British Library by over 150 years. Currently measuring some 60,000 linear metres, these internationally significant materials are made accessible to academics, students, and other researchers, in reading rooms, in seminar rooms as part of University teaching, and increasingly through digital technology. For the wider benefit of the public, they are shared through exhibitions, publications, events, and digital initiatives. The collections form one of the world's most important coherent bodies of documentary heritage and include items inscribed on the Unesco Memory of the World register. In addition to the written word, the collections include outstanding holdings of art and photography and a significant quantity of objects. The collections are recognised in Arts Council England's Designation Scheme which 'identifies the pre-eminent collections of national and international importance held in England's non-national museums, libraries and archives, based on their quality and significance'.

Some categories of special collections material include legal deposit material (e.g. maps, music and rare books) but most is acquired through bequest, donation, purchase and via the Arts Council England's tax incentive schemes for acquisitions, including allocation-in-lieu of death duties and the cultural gifts scheme. Occasionally, material is taken on loan (or 'deposit').

3. Governance

The Department of Special Collections is led by the Keeper of Special Collections who reports up through the Deputy Librarian to Bodley's Librarian and ultimately the Curators of the University Libraries. The Keeper has general responsibility for the management of the University Archives; but in recognition of the latter's role in support of the University administration, there is a separate University Archives Subcommittee of the Curators, of which the Keeper is a member. The Libraries' public right to receive special collections allocated under the ACE schemes is regularly tested by The National Archives, latterly under its Inspection and Approval scheme and henceforth through its [Archives Accreditation Scheme](#).

4. Staff and Resources

The Department of Special Collections is allocated an annual budget in support of its staff and non-staff activities, but increasingly relies upon a variety of external sources to develop and manage the collections and to make them accessible. Adequate permanent resources for the management of special collections, including staffing, will form part of the organisational health criteria assessed by the National Archives in its accreditation scheme, and the Libraries seek to achieve an appropriate complement of staff across the Department.

5. Scope

The Department of Special Collections develops, administers, and makes accessible materials of widely differing form and content. The scope of collections is explained in further detail in the Special Collections Collection Development Policy.

6. Extent and Storage

The Libraries house some 60,000 linear metres of special collections in a variety of locations, including some site Libraries, but have been gradually consolidated in order to achieve optimum security and environment and appropriate levels of accessibility.

The majority of special collections material is divided between the Book Storage Facility and the Weston Library, both of which conform to the highest standards of modern storage for special collections. Policies exist for determining future locations of material and detailed statistics are maintained relating to current and proposed locations. Special Collections staff work with colleagues in other Bodleian Libraries to achieve best practice in the care of material held outside the Weston.

The Libraries' rapidly developing holdings of digital collections, whilst usually forming an integral part of paper collections, require different forms of management and are stored and managed by the BEAM (Bodleian Electronic Archives and Manuscripts) service.

7. Accessioning

Accessioning signifies the general acceptance of collections into the Libraries' holdings but not necessarily on a permanent basis (see 8 below). Accessioning varies according to the management requirements of diverse formats of material, which may range from a single printed book to an archive comprising 10,000 boxes, but all material is appropriately recorded in registers or on a collection management database and stored before being fully accessioned through cataloguing.

8. Disposal policies

The Bodleian Libraries retain the right to weed, return, transfer, or dispose of unwanted non-legal deposit material, and would normally identify such material in the process of accessioning or cataloguing in the case of large collections which are impossible to appraise fully in advance of their physical arrival. This material would generally include categories such as non copy-specific texts readily available elsewhere, including offprints, publications, un-annotated proofs, mimeographed, photocopied or otherwise duplicated typescripts, facsimiles of archival material, duplicate books, maps, and musical scores. Such material will be retained where it adds to the intellectual coherence or integrity of any collection of which it forms a part, or where it has a significant cultural value in its own right. The Libraries retain the right in exceptional circumstances to de-accession and transfer material when it can be more suitably used and accommodated elsewhere (for example diocesan records to local authorities).

9. Cataloguing

Since the foundation of the Bodleian, the Libraries have undertaken numerous cataloguing initiatives and many historic catalogues still serve an important function in providing access to Library collections. Several different approaches are taken to current cataloguing, depending upon format and the availability of funds, but in each case the approach conforms to recognised standards such as RDA, DCRM(B), local OxCat rules in the case of printed materials, and ISAD-G in the case of manuscripts. Current cataloguing initiatives aim to make information relating to collections available online and, where resources allow, are supplemented by campaigns to retrospectively convert earlier manual finding aids to searchable online catalogues.

10. Collection Care

- Bodleian Libraries' Preservation Policy.
- Bodleian Libraries' Digital Preservation Policy.

11. Loans

Special collections material is regularly lent to recognised institutions for the purpose of public exhibitions. Loans to other institutions follow established protocols and are subject to the authorization of the Curators of the University Libraries. Loans between British institutions or involving private lenders (including deposited collections) may be covered by the Government Indemnity Scheme.

12. Access

In keeping with the vision of its founder, Sir Thomas Bodley, the Libraries aim to enable the widest possible use of their special collections by students, scholars, and other researchers able to present a reasonable case for access, and to do so within a framework of regulations designed to preserve and protect rare, valuable, and delicate materials. In addition, readers are required to abide by legislation pertinent to the use of special collections, including Data Protection, Freedom of Information, and Copyright. Special Collections also feature prominently in the Libraries' public engagement activities.

