Collection Policy

NOTE: The SP Collection policy has been revised as of May 2014. This page will be updated, but the new policy is restricted to OCUL members, so the below policy may remain in place for hisorical/informational purposes.

The revised Collections Policy can be found at:

https://spotdocs.scholarsportal.info/display/oculir/Scholars+Portal+Collections+Policy+-+Revised

Everything below this line is historical and probably outdated.

The following is Scholars Portal's Collection Policy, as approved by the OCUL Directors. The actual policy is located at:

http://spotdocs.scholarsportal.info/display/oculir/Scholars Portal Collection Policy-Final

Scholars Portal Collection Policy

Purpose
The purpose of this policy is to provide direction on how Scholars Portal (SP) is to be populated with a diversity of digital content in a way that is coherent, forward-looking, and sustainable. This is in accordance with OCUL's Strategic Directions, one of which is
to "Provide and preserve a rich academic resource for teaching, learning, and research" for Ontario's university population. This policy also serves to state Scholars Portal's policy of acquisition in its role as a trusted digital repository for its users and stakeholders.
Our goal in aggregating content is twofold: long-term preservation and enhanced discovery.
The purpose of SP is to host, whenever possible and in perpetuity, a critical mass of works that has intellectual significance and long-term value, and deliver this in an environment that allows for ease of searching, browsing, retrieval, and reuse. Content decisions are based on recognized collection development principles such as: authority, originality, curricular and research relevance, timeliness, breadth or depth of coverage, and demand. It is understood that these principles apply to all subject or research areas, across all chronological periods and geographical regions, and that the materials acquired would be in English or French predominantly, but could comprise other, including indigenous, languages.
This policy is intended to capture what is important to include in SP and is not limited to what will be hosted in perpetuity.

Background and Mandate
Scholars Portal is the cornerstone of consortial collection development strategy for Ontario universities. It provides a stable consortially-owned infrastructure for delivering digital collections to the Ontario university community based on a shared vision by Ontario universities for the provision of scholarly resources in a rapid, reliable, and cost-effective manner. Equally important is the stewardship and preservation of our owned materials for future generations of users, including: students, faculty, staff, and other patrons of OCUL member institutions; content producers; and members of the general public. In addition, relevant metadata is hosted alongside full-text content in order to expose users to a wider range of possibilities, thus offering the opportunity to enrich the researchers' environment. Underlying SP is the value proposition that a collaborative approach to resource delivery and preservation can yield powerful and innovative results by linking ideas, materials, documents, services, and researchers.

Scholars Portal is the digital library for the OCUL universities. It is more than the sum of its parts. To this end, it is essential that SP continues to explore infrastructure options and service needs in order to maximize the use and value of the digital collections.

Since its inception in 2002, SP has expanded from its initial focus on archiving and delivering e-journal literature to include a wide range of other resources - e-books, government publications, maps, and numeric and geospatial data. This can be considered a core body of material supporting the diverse requirements for learning, teaching, and research. As information technologies rapidly evolve, it is expected that other types of resources, often interdisciplinary, heterogeneous, and serving niche needs in individual institutions, will be added to Scholars Portal. It will be important to capture student and faculty outputs in various forms in order to highlight this material for further use in teaching, learning, and research.

To the greatest extent possible, SP is conceived as a one-stop portal that supports scholarship, innovation, and knowledge creation in its broadest diversity and potential for the Ontario university community. It is expected that there will be more non-conventional, non-textual resources loaded in the future, such as datasets, streaming content, multimedia resources, and mapping applications. Scholars Portal will develop models for incorporating and accessing emerging formats such as images and streaming audio across disciplines.

It is also understood that these digital collections need to be made available without barriers, to the greatest degree possible, in order to provide equitable access to everyone in the Ontario university community in accordance with the Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, c. 11.

Principles

1. Collection criteria pertaining to quality and relevance should be paramount and applied consistently across all resources.

2. Principal considerations include:

- establishing a coherent rationale for the addition of each resource into SP, thereby meeting faculty and student information needs;
- providing orderly access and guidance to the digital resources, and integrating them into library service programs.

3. Striving for balance to be maintained among:

- disciplines;
- teaching and research tools;
- diverse requirements of user groups (i.e. undergraduate, graduate, faculty, clinical faculty);
- information formats (i.e. reference, abstracting/indexing, full-text, e-books, e-journals, data – both numeric and geospatial, etc);
- unique needs of each OCUL institution, while recognizing that local institutional collection development decision-making and practices must be respected.

4. Resources that offer economies of scale by benefiting the most students and faculty across OCUL will be taken into account.

5. Consideration will be given to loading digital resources which offer significant added value over print equivalents in such ways as:

- more extensive content;
- broader functionality, such as the ability to invoke linkages to local and/or related resources;
- enhanced access due to the fact that there can be universal, rapid, and remote delivery of content;
- improved resource sharing due to the ubiquity of digital resources;
- ease of archiving, replacing, versioning, and preserving.
- meeting accessibility requirements as described in the Accessibility for Ontarians with Disabilities Act, 2005

6. Scholars Portal include content that supports undergraduate, graduate and faculty needs.

7. As permitted, collections will be added to SP more or less evenly among all disciplines so as to maintain a balance between broad subject categories while recognizing that some subject areas are more prolific in the production of digital content.

8. As much as possible, for each discipline the needed breadth and critical mass of electronic material should be loaded. This includes material licensed or acquired and material digitized from OCUL members' individual collections.

9. Material from OCUL institutional repositories will be considered for inclusion in SP based on this policy.

10. Priority will be given to collections of provincial and national significance.

11. Lower priority will be assigned to materials where access is already adequate, where there is no system-wide cost advantage, where there is comparable open-access material, and where materials present technical difficulties.

12. OCUL-IR will continue to use existing protocols for acquisition of materials and to make recommendations for selection and deselection.

13. Open-access materials will be considered for inclusion in SP based on this policy.

Establishing Priorities

The following list represents Scholars Portal's priorities when loading new resources. The list offers a guide to their relative importance, but unsuitability by one criteria will not necessarily disqualify a resource that is otherwise suitable. In all cases, the final decision will be made through discussion between Scholars Portal staff and members of the OCUL-IR committee.

(1) Extent of commitment - Number of OCUL subscribers

(2) Demand - How heavily the collection is used

(3) Technical issues - How smoothly resources load and integrate into existing SP platforms

(4) Collections at risk - Is the collection at risk of disappearing or becoming otherwise inaccessible

(5) Geographical scope - Whether content is from Ontario or Canada

(6) Availability - How easily is it found elsewhere

Given the evolving nature of information resources, this Collection Policy should be tabled for review triennially by the OCUL Directors.

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