



International Federation of  
Library Associations and Institutions

## Competency Guidelines for Rare Books and Special Collections Professionals

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On behalf of the IFLA Rare Books and Special Collections (RBSC) Section

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Endorsed by the IFLA Professional Committee



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# 1. Understanding Special Collections, their Context, and the Purpose of the Competencies

## *Introduction*

Libraries are the guardians of cultural memory and the preservers of cultural heritage. Libraries are also the catalysts for cultural change. Within larger libraries and as stand-alone repositories, special collections libraries are the specific sites where documentary and cultural heritage is preserved. Not only the information content of these handwritten works, printed texts, works on paper, audio-visual materials and artifacts deserves preservation, but also the objects themselves because of their historical and cultural significance. It is these collections that lie at the core of special collections librarianship. The collections mentioned in this document refer to the various cultural objects collected by libraries and institutions, regardless of format.

## *Purpose*

This document outlines the competencies that were developed as a guide for all library professionals who work with special collections materials, both analog and digital.

These guidelines provide direction and focus for special collections professionals to facilitate their own career development, as well as to manage their special collections in line with their institutional policies and user needs.

It is hoped that the guidelines can serve as a basis on which training programs can be developed to ensure special collections professionals develop core competencies relevant to their continuing professional development. The document also delineates the ethical framework within which special collections professionals are to perform their professional duties to uphold their positions as the trusted stewards of cultural heritage materials.

## *Scope*

It is understood that special collections professionals need to be familiar with their own institutional policies, practices and processes as well as have an overall understanding of various disciplines and subjects beyond general library knowledge, including emerging best practices worldwide and other related international guidelines.

As this is a document that recommends the skill sets and knowledge that a special collections professional need to acquire for their professional development and proper management of their special collections, it does not cover best practices or SOPs which are most likely institution specific.

It is, nevertheless, recommended that this document be read together with other relevant IFLA guidelines and policies that are listed in the bibliography.

## ***Target Audience***

These guidelines have been written for special collections professionals—be they rare book librarians, archivists, conservators or staff members—who are the stewards given the responsibility for the care and safe-keeping of these objects. The guidelines should also be useful for the managers of special collections professionals, and students aspiring to work in special collections. Special collections professionals accept these cultural materials as worth preserving, whether in analog or digital format, and this acceptance often will transcend the professional obligations to meet the immediate needs of current users. Therefore, special collections professionals must understand, respect and balance the needs of the objects in their collections while recognizing and respecting the needs of the users.

The IFLA Rare Books and Special Collections (RBSC) Standing Committee does not assume a single person will be expert in all of these competencies. Nor does the committee assume the full list of lifecycle stages and tasks will be relevant for every institution.

## ***Background***

*What are Rare Books, Archival Collections, Manuscript Collections, Special Collections, and Special Collections Libraries?*

The term ***rare book*** is a complex one, and one that is not easily defined. The concept originated not with educational or cultural institutions but with western book collectors and the rise of the antiquarian book trade in the seventeenth century. Early Dutch book dealers and collectors were the first to coin the term *rari libri* as evidenced by a sales catalogue from Delft dating to 1609.<sup>1</sup> The phrase was then adopted by German book dealers and later by French and British tradesmen to also describe certain books in their sale catalogues. It was a deceptive but effective advertising practice used by the dealers to sell books. The dealers provided no rationalization nor criteria for this unique label, and often sold contemporary editions alongside earlier works and identified all as rare books. It was simply a fabrication on the part of the dealers to make some of their wares decidedly more desirable and usually more expensive for the buyers.

In the last two hundred years, the field of rare book librarianship has evolved as has the definition of a rare book. In western libraries, there are several generally agreed upon factors which go towards determining whether a book is rare: its rarity (because few copies were printed or few survived); its condition (pristine, worn or soiled); its age (manuscript, proto-printing, incunables, or modern); format (fine printing) or copy-specific features such as bindings or ownership inscriptions. Rare books are also expected to hold historical, cultural, intellectual or monetary value, although ideas about what constitute these values have changed over time and may vary from secular, academic or religious institutions and from one country to another country.

Special collections libraries, like all libraries, have space, budgetary, staffing, policies, or other types of constraints that prohibit them from collecting every book, archival collection or cultural heritage item. In order to fulfill their missions to their home institutions, governing boards or government agencies, special collections libraries usually have collection development policies which outline the process of building collections over time within a set budget, based on assessments and the ongoing research of the needs of the libraries' users. For special collections libraries, the selection

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<sup>1</sup> David McKitterick. *The Invention of Rare Books: Private Interest and Public Memory, 1600-1840*. Cambridge, United Kingdom: Cambridge University Press. 2018.

criteria for rare books are often more specific and exclusionary than the selection guidelines for general library collections.

In this set of competencies, the term *rare book* is used to characterize a book based on any one or combinations of the following six broadly defined criteria<sup>2</sup>: 1) market value; 2) rarity and scarcity; 3) date and place of publication; 4) physical and intrinsic characteristics; 5) bibliographic and research value (historical, cultural or intellectual interest; and 6) condition (see Appendix 1). These six criteria should be used to assist special collections professionals in the determination, selection and identification of rare books in order to support their collection development decisions. The number of criteria and the type of selection criteria will differ from each institution. For some institutions, one criterion may be sufficient whereas for others two or more criteria may be necessary for selection. Perhaps most importantly, these criteria provide a common framework from which special collections professionals can use to build, support and maintain their collections.

The terms *archival collections* and *manuscript collections* refer to historically valuable unique, unpublished materials created and accumulated for their own purposes by an organization, individual, or family and preserved with other records from the same creator that document the same activities. Materials of historical interest may be collected over time by an institution's own archives or acquired as a collection of organizational records or personal papers by an unrelated collecting organization, such as a special collections library. Examples of archival materials might include official correspondence, account books, agreements, and documentation of meetings and special events. Examples of personal papers might include private correspondence, diaries or journals, working papers such as drafts of a book in an author's papers, and a wide variety of other materials that an individual creates or receives in the course of his or her activities. The word manuscript implies handwritten and unpublished documents, but many recent personal papers in special collections will also contain unique materials produced by typewriter or personal computer.

The term *special collections* refers to a collection or collections of materials such as incunabula, rare books, printed books, manuscripts, archival records and materials, ephemera, photographs, prints, maps and other graphic works; audio-visual material in all formats; born-digital and digitized media; art objects and three-dimensional (3-D) objects<sup>3</sup> deemed irreplaceable or considered to be unusually rare and invaluable. The selection criteria for these materials are comparable to that used for rare books. Special collections are usually managed separately from general library collections because their preservation needs and the methods of providing access are different from the circulating book collections that make up most library holdings. Special collections are often housed in secure and environmentally controlled locations.

The phrase *special collections library* is used to encompass rare book, manuscript, archival or other types of special collections housed together as a distinct unit. Usually, special collections libraries are located in or associated with a home library or institution. They are staffed with skilled and trained professionals who are responsible for managing the collections. Special collections libraries often invoke stricter rules for the use and access of their collections. They have secure

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<sup>2</sup> Books and Manuscripts Section, Association of College and Research Libraries. *Guidelines on the Selection and Transfer of Materials from General Collections to Special Collections*. Accessed February 24, 2019. <http://www.ala.org/acrl/standards/selctransfer>.

<sup>3</sup> Rare Books and Manuscripts Section, Association of College and Research Libraries. *ACRL Guidelines: Competencies for Special Collections Professionals*. Accessed February 24, 2019. <http://www.ala.org/acrl/standards/comp4speccollect>.

and monitored facilities with climate-controlled environments to preserve and protect the collections.<sup>4</sup>

The names or titles for these special collections libraries will vary depending on language, cultural history, and institutional organization. Examples of such libraries include:

- Biblioteca Palácio Nacional de Mafra (Mafra Palace Library)
- The Cultural Heritage Collections (University College Dublin)
- Les Collections de la Réserve des livres rares (Bibliothèque nationale de France)
- Alte und seltene Drucke (Bayerische Staatsbibliothek)
- Livros raros e coleção de manuscritos (Biblioteca nacional de Portugal)
- The Beinecke Rare Book & Manuscript Library (Yale University)
- Sezione Archivio Storico (Biblioteca Universitaria di Bologna)
- Special Collections and Archives (Southern Methodist University)
- Coleção Memória da Biblioteconomia-FBN/UNIRIO (Universidade Federal do Rio de Janeiro, Brazil)
- Colección Especial Maestro Luis Iglesias (Universidad Nacional de Luján, Buenos Aires, Argentina)
- Biblioteca Apostolica Vaticana (Città del Vaticano).

However, it is not unusual for special collections libraries to exist as personal or family libraries (e.g., The Brenthurst Library, South Africa), stand-alone institutions (e.g., *The Casa de la Literatura Peruana*, Peru), in museums (e.g., The Smithsonian Libraries), or as private research organizations (e.g., The Library of the General Society of Mechanics & Tradesmen, United States).

#### *How Could These Competencies Be Used?*

These competencies may be useful for—but are not limited to—all types and levels of managers and staff, special collections professionals, educators, and individuals interested in special collections librarianship careers. Managers and staff can use these competencies to assist with the recruitment of new employees, the creation of job descriptions, to provide guidance for non-expert custodians of special collections, or to advocate for qualified staff in their libraries. These competencies can also be used by special collections professionals to assess the skills and training needs of present staff, to improve practices within their organization, or as a guide to help with individual professional formation or development. Library and information schools can use the competencies to assess their curricula and pedagogical programs in relation to current trends or future needs. Library school students can use the competencies as a general overview of the field of special collections librarianship and the skill sets required to work in it.

As the library profession increasingly focuses on content or information, regardless of format, there is a need to ensure that those responsible for the preservation, description, and access of the physical and virtual objects identified as cultural heritage materials understand the significance of such objects and are qualified to care for them. One irrevocable tenet in special collections librarianship is the need for professionals to have an intimate connection to their collections and their context. Examples of such contexts include the general historical and cultural background of objects or collections and the history and provenance of the collections themselves, the knowledge

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<sup>4</sup> University of Glasgow. *What are Special Collections?* Accessed February 24, 2019. <https://www.gla.ac.uk/myglasgow/specialcollections/whatarespecialcollections>.

for their access, discoverability, handling, treatment, storage and preservation, and the knowledge of current professional standards, guidelines, and best practices concerning the objects or collections under their stewardship.

The competencies set forth here do not focus entirely on professional formation nor do they create an unachievable exemplar of the special collections professional, but rather they are to serve as guidelines for the types of knowledge and expertise expected of professionals working with rare books and special collections at various stages of the items' lifecycles. The IFLA RBSC model aligns with the competencies guidelines recently adopted by the Association for College and Research Libraries (ACRL) and Rare Books and Manuscripts Section (RBMS) for special collections professionals.<sup>5</sup> The IFLA RBSC model differs, however, as it is international in scope and recognizes the global diversity of routes into special collections librarianship, with some countries and sectors emphasizing scholarly expertise while others emphasizing general professional qualifications. The IFLA RBSC competencies model describes best practices and explains the necessary skills required, but it also allows for countries, sectors and regions to develop their own more focused and detailed competency guidelines reflecting specific requirements and practices.

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<sup>5</sup> Rare Books and Manuscripts Section, Association of College and Research Libraries. *ACRL Guidelines: Competencies for Special Collections Professionals*. Accessed February 24, 2019. <http://www.ala.org/acrl/standards/comp4specollect>.



## 2. The Stages in a Special Collections Lifecycle: From Acquisition to Discovery

### **Selection: Rationale and Means of Acquisition**

By deciding what or what not to collect, special collections professionals actively participate in the preservation and framing of intellectual and cultural history and the formation of their institution's individual identity. As special collections professionals select, build, and manage their collections, they do so in accordance with their institutions' mission statements, the history of their collections, the collection development policies of their institutions, funding and budget allocations, institutionally defined responsibilities, and considerations of current and future user needs and expectations. Even if some collections may be closed to new acquisitions, the special collections professionals responsible for them may still find these tasks relevant to their legacy or historical collections.

### **Competencies:**

1. A special collections professional builds and maintains special collections based on collection development policies that support their institutions' missions. Criteria used to create collection development policies are usually institution specific and based on institutional interests, needs, and/or areas of specialization. Criteria may also include: format type, rarity, scarcity, age, physical and intrinsic characteristics, condition and stability, market value, historical and cultural significance, pedagogical and research value, and assessed and/or expressed user needs.
2. Engages in pro-active collecting in targeted areas. Seeks to establish respectful and collaborative relationships with organizations or individuals from groups underrepresented in the historical record, and with local organizations as possible sources of appropriate materials.
3. Understands the circumstances when it is appropriate not to add potential acquisitions to collections. Conversely, understands when potential acquisitions that do not fall into existing collections areas may be made in anticipation of new interests, exhibits and/or outreach value.
4. Develops and maintains knowledge of practices relevant to their institutions' purchase, donation, and documentation activities, including the antiquarian book trade, manuscript, memorabilia, and ephemera marketplaces, private individuals, artists, and presses, documentarian and web archiving activities, scheduled deposit programs, and other sources for acquiring materials.
5. Employs effective and ethical acquisition methodologies based on knowledge of the wide range of acquisition methods (auctions, book, memorabilia, and ephemera fairs, sale catalogues, direct offers by book sellers, private collectors, public institutions) in accordance with institutional, professional and ethical standards and values.

6. Engages with donors and creates strategies for identifying and cultivating potential future donors, both short and long term, and for accepting or negotiating gifts. Prepares deeds of gift and deposit agreements. Accounts for current and future intellectual property and copyright concerns. Maintains accurate records of communication between institutions and donors.
7. Identifies the financial value of acquisitions based on market knowledge, use and application of appropriate information tools, media knowledge and experience.
8. Knowledgeable of the legal framework (e.g., issues of provenance, cultural heritage protection, reparation or restitution issues) associated with their collections. Maintains professional contacts for monetary appraisals, relevant tax regulations, customs regulations, and legal resources.
9. Knowledgeable of stewardship requirements for newly acquired materials and acts responsibly when preparing for acquisitions and the impact they may have on staff and resources.
10. Considers and develops collaborative collecting strategies with other institutions.
11. Develops or revises collection development policies as necessary.

### **Acquisitions: Arrival, Documentation, Assessments, and Entry into Library Information Systems**

In most instances, the institutional life cycle of special collections materials begins upon its arrival in its library. While general acquisitions policies, procedures and practices vary from library to library, special collections materials require specific handling and security procedures to ensure their safekeeping. It is at the initial point of entry into the library, the acquisitions stage, when special collections professionals should assume full responsibility for their objects. Here, these professionals are responsible for inventorying or accessioning materials, maintaining accurate and complete transaction records, assessing conditions, prioritizing workflows, providing security and monitoring materials as they physically and virtually move through the library and its information system. These issues may be relevant to historical or legacy collections as well as to new acquisitions if some steps were not done when the collection was originally acquired.

#### **Competencies:**

1. A special collections professional is knowledgeable of inventory methods and practices. Documents the arrival of each acquisition (object or collection) either in accession, inventory or bibliographic record formats.
2. Documents and records all paperwork pertaining to acquisitions including correspondence, agreements, gift or deposit agreements, invoices, and bills of sales. These records should be maintained for the life of the materials or at the very least, in compliance with each country's records management laws in order to document institutional ownership and document provenance.

3. Knowledgeable of special collections physical conditions attributes, characteristics and terminology. Assesses the condition and preservation needs of individual items and collections and makes recommendation for future preservation or conservation treatments. Makes recommendations about integrating new acquisitions into the library's collections and user availability.
4. Develops processing (e.g., preservation, cataloging, digitization, and housing) policies, priorities, and strategies and determines workflows.
5. Establishes security procedures to track and monitor materials as they move through the institution and library information system.
6. Ensures materials receive proper preservation treatment and protective enclosures, objects are labeled and receive ownership marks and security tags in accordance with professional standards.
7. Contributes to the development of procedures concerning special collections acquisitions, prioritizations for processing, shelf preparation, collections management, and the preservation of special collections materials in all formats.

## **Cataloguing and Resource Discovery**

Professionals with responsibilities in processing and/or describing special collections materials in all formats need a strong working knowledge of the general and material specific standards, practices, and the tools for bibliographic and archival control. They also need subject expertise to interpret, describe, and provide access to materials in their collections. Specific language skills and knowledge of alphabets may be required to describe and catalog the collection. The environment for creating, exchanging and discovering metadata is constantly developing, and special collections professionals should be current on cataloguing best practices.

### **Competencies:**

1. A special collections professional ensures materials are appropriately and effectively processed and described, by applying a knowledge of bibliographic and archival principles, book history, book arts, paleography, philology, codicology, subject and historical context, use and provenance of materials, physical characteristics, and production techniques of special collections materials.
2. Determines appropriate processing and description levels and practices considering assessed user needs and informed by knowledge of institutional priorities and resources. Ensures description is made available to patrons in a timely manner and understands the role of access and retrieval in making descriptive decisions.
3. Develops and maintains knowledge of current and evolving standards, guidelines, rules, best practices, tools, and trends regarding processing, describing and connecting special collections materials in all formats.

4. Understands the shared frameworks for metadata creation and resource discovery, including national and historical bibliographies, union catalogues and aggregators, and actively contributes information from one's own institutional collections to these as appropriate.
5. Creates and manages descriptive data for digitization, born-digital and digitized materials. Knowledgeable of the specific metadata requirements of special collections, of format-specific needs, e.g., the differences between early printed and modern materials, and/or OCR requirements.
6. Provides a secure holding area for special collections materials staged to be catalogued.

## **Digital Data Management**

Special collections professionals use information technologies to manage collections and provide enhanced access to materials. As part of their mission to make their collections available to users, they explore, evaluate, and adopt appropriate tools to achieve their goals. Working with rapidly changing information technologies requires them to be flexible, committed to continual learning, and able to collaborate with other librarians, archivists, and staff. They cultivate general communication and organizational abilities as well as a core set of specific and technical skills. Special collections professionals develop standards and best practices for the application of information technologies relevant to their work and for all materials in all forms, taking into consideration the policy of their own institutions. In many institutions, specialized technical staff may be responsible for this work, but the principle that those responsible for doing work with special collections should understand the special needs of these materials is equally true for these skills.

### **Competencies:**

1. A special collections professional selects items for digitization when appropriate, assessing the requests of scholars and users, and using criteria documented in institutional collection development policies including rarity, age, physical and intrinsic characteristics, condition and stability.
2. Communicates the importance, methods, needs, and priorities of digital projects to a variety of partners, including those with limited technical knowledge; is an effective and diplomatic educator of colleagues and collaborators in matters relating to information technology; identifies and includes stakeholders in decision-making.
3. Develops and maintains current knowledge of issues, standards, trends, and best practices regarding the creation, management, development, curation, storage, organization, appraisal, description, and preservation of digitized and born-digital special collections.
4. Applies knowledge of data models and query languages to effectively maintain and deliver access to special collections and archival metadata.

5. Uses and configures digital repository, digital preservation, data management, content management, and discovery systems, including open-source solutions in cooperation with digitization managers.
6. Manages digital repositories, applying knowledge of best practices to access, catalogue, create, edit, describe, disseminate, ingest, and preserve digital objects.
7. Maintains active knowledge and awareness of data creation management and manipulation tools to support assessment and research activities.
8. For long term digital preservation, evaluates formats, specifications and systems and selects data for long-term preservation; develops and implements long-term digital preservation environments; cultivates profound knowledge of the realization of data backup, data rescue and long-term backup strategies.
9. Has sufficient knowledge of the legal issues related to the creation, management and preservation of digitized collections.

### 3. The Stages in a Special Collections Lifecycle: From Access to Deaccessioning

#### Access

Access has been defined *as the means of discovery and encompasses the processes followed to make materials of all formats available to users, the tools used to publicize materials to potential users, and the openness with which special collections materials are made available to the public.*<sup>6</sup> Providing access, physical or virtual, presents unique and ongoing challenges to special collections professionals. They must promote their collections and make their holdings discoverable to the public in a timely manner after their acquisition. They must also provide equitable access to all materials including original source materials. It is a delicate balance of making collections discoverable and accessible while protecting them from damage from use and safeguarding them against theft.

#### Competencies:

1. A special collections professional ensures materials are processed and described in a timely manner. Provides bibliographic information to the public through the institution's information system, digital repositories or other platforms.
2. Provides access to all materials unless restricted by law, donor agreements or institutional access policies. Communicates to researchers and colleagues clearly defined library access policies.
3. Develops and implements policies and procedures for the reading rooms and the retrieval, proper handling and storage of requested materials formed by professional guidelines, standards, and best practices.
4. Develops and implements public services (reference, duplication, circulation, exhibition, and intra- and internal library loans) policies and procedures as determined by professional guidelines, standards, and best practices.
5. Provides reference assistance to all inquiries; maintains the confidentiality of researchers and their work.
6. Develops and implements security policies and procedures for public and non-public staff or work areas determined by current trends, professional guidelines, standards, and best practices.
7. Publicizes and communicates the library's clearly defined access services, public services and service fees procedures and policies.
8. Continually assesses the condition and preservation needs of individual items and collections and makes recommendation for future treatment and access.

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<sup>6</sup> Barbara Jones, "Hidden Collections, Scholarly Barriers: Creating Access to Unprocessed Special Collections Materials in America's Research Libraries", *RBM: A Journal of Rare Books, Manuscripts and Cultural Heritage* 5, no. 2 (2004): 88–105. <https://rbm.acrl.org/index.php/rbm/article/view/230>

9. Develops and maintains knowledge of the library's individual special collections and of current collections related research and publications in order to provide expert reference assistance.
10. Publicizes and communicates the library's concise credit citation and copyright policies.

## **Collection Management, Preservation and Conservation**

Collection Management is one of the most important functions of the staff in a special collections library. Professionals assigned collection management duties are responsible for the long-term maintenance of their collections, regardless of format. As they manage collections ranging from good to fragile condition and ranging in format from manuscripts to printed books to born digital media to archival collections to artwork and three-dimensional cultural heritage artifacts, these professionals must be knowledgeable of the current and emerging principles of library, archival, and museum preservation and conservation. They must know the standards and best practices including appropriate standards for the storage, transportation and exhibition of materials. Special collections professionals must ensure that their materials remain secure and protected from all internal and external environmental threats, theft and damage.

### **Competencies:**

1. A special collections professional is knowledgeable of current library and archival preservation and conservation standards, techniques and practices.
2. Adheres to professional standards for the public use, handling, housing and storage procedures of special collections materials.
3. Routinely conducts collection preservation assessments. Identifies the preservation and conservation needs of individual items or entire collections and determines treatment priorities.
4. Maintains contact information of professional experts and resources and will request professional advice when needed.
5. Conducts regular inventories of both catalogued and uncatalogued portions of all collections. Maintains up-to-date shelf lists; maintains up-to-date records of missing / lost items and follows security procedures for reporting missing items to appropriate administrators or agencies.
6. Knowledgeable of security measures and strategies for preventing and responding to vandalism and thefts. Able to develop security programs for a department or library.
7. Knowledgeable of health and safety issues relating to the collections, which may include storage and access conditions, materials of a dangerous or toxic nature, or mold on collection items. Knowledgeable of measures and strategies for preventing risk to staff and patrons, and of procedures for dealing with such items in their collections, including destruction when appropriate.
8. Knowledgeable of disaster response programs. Able to respond to disasters by implementing standard policies and procedures. Able to develop a disaster response program for a department or library.

## **Outreach, Exhibits, and Instruction**

Special collections professionals need to engage in and support active outreach, exhibits, and instructional programs in line with their institutional missions. These participatory programs encourage collections usage which is often vital to the collections' ongoing stewardship and institutional support. Outreach, exhibits, and instruction programs could be initiated to include researchers, teachers, students, and the public through exhibits, pedagogy, programming, events, online experiences and visitations. Outreach, exhibit and instruction programs should encourage the access and the study of all special collections materials, including primary source and cultural heritage materials when possible. Instruction and outreach activities should be viewed as opportunities to reduce barriers to access and increase the numbers and types of users who can benefit from the collections.

### **Competencies:**

1. A special collections professional reduces administrative, physical and social access barriers to the special collections when possible. Provides an environment supportive of study, research and scholarly collaboration.
2. Knowledgeable of current research, areas of public interest and social trends relating to the institution's special collections. Recognizes the potential research and pedagogical uses of the collections and is able to effectively match them to the needs of the diverse audiences.
3. Able to identify and target potential researchers, instruction or audiences for use of special collections materials.
4. Encourages researchers, teachers, students, and visitors to engage with all types and formats of materials held by the institution including primary sources, cultural heritage materials, rare book collections, archival collections and manuscripts as well as navigate the use of other related physical and digital information sources.
5. Develops and facilitates interactive programs, seminars, workshops, exhibitions, and events that promote special collections materials and enhance the experience for users and engage visitors. Develops programming for diverse populations.
6. Creates appropriate interpretive exhibition, informational or instructional content when presenting or teaching with materials with potentially sensitive gender, ethnic, cultural or historical issues.
7. Supports opportunities for special collections materials to be used in classes or curriculum design in parent or other institutions. Develops instructional programs utilizing primary source materials (when condition allows use).
8. Develops and delivers effective library instruction sessions to diverse audiences. Structures presentations, from selection of materials to interpretation to content to delivery, that are appropriate for each audience level.
9. Supports institutional collaboration and cooperation through internal and external loan programs.



## Promotion and Marketing

Promotional activities increase the visibility of special collections libraries. Through effective digital, media and print methods, special collections professionals can disseminate information about the value of their collections and the services and events they offer. By developing and implementing strategic communications and marketing plans, special collections professionals educate their audiences to the mission, vision, values, and contents of their libraries or parent institution or organizations, ensuring that potential users and visitors know about the resources and programs available.

### Competencies:

1. A special collections professional develops marketing strategies that promote the library, collections and accessibility to materials in order to raise its profile in the community and at the national and possibly global levels.
2. Develops marketing strategies that identify and target continuing, new and underrepresented audiences, groups and organizations at the local, national and global levels.
3. Uses social media, digital, print and other physical formats to effectively publicize the library, its materials, events, programs, services, and special events.
4. Collaborates with parent or other institutions to promote collections or events.
5. Demonstrates the value of the special collections library, its historical or cultural significance and of its impact on the local economy.
6. Promotes a safe, welcoming and respectful environment.

## Advocacy

Advocacy encompasses external advocacy or the ability to explain the importance of special collections to the public and the tools to reach a broad audience with that message. Advocacy also includes internal advocacy which is the means of articulating to management, budget allocators, and organizational stakeholders the value of the special collections while encouraging internal partnerships and internal use of special collections. Advocates for special collections must explain the importance of preserving these cultural heritage collections for the long term and the resource implications of doing this well.

### Competencies:

1. A special collections professional articulates the need to preserve special collections materials and the funding, staff and facilities required to undertake such responsibilities.
2. Demonstrates to its parent institution, stakeholders and the public the value of special collections libraries through assessment surveys, programming and outreach activities.
3. Integrates the special collections library into broader institutional and community environments through collaboration, outreach, recognition programs and infrastructure development mission. Connects special collections libraries to parent institutional goals, curriculum and local community involvement.

4. Engages with and supports diverse user populations in working with special collections materials.
5. Knowledgeable of national and international cultural heritage trends and how they relate to the special collections library.
6. Seeks external funding opportunities to promote, preserve and protect the special collections.

## **Deaccessioning**

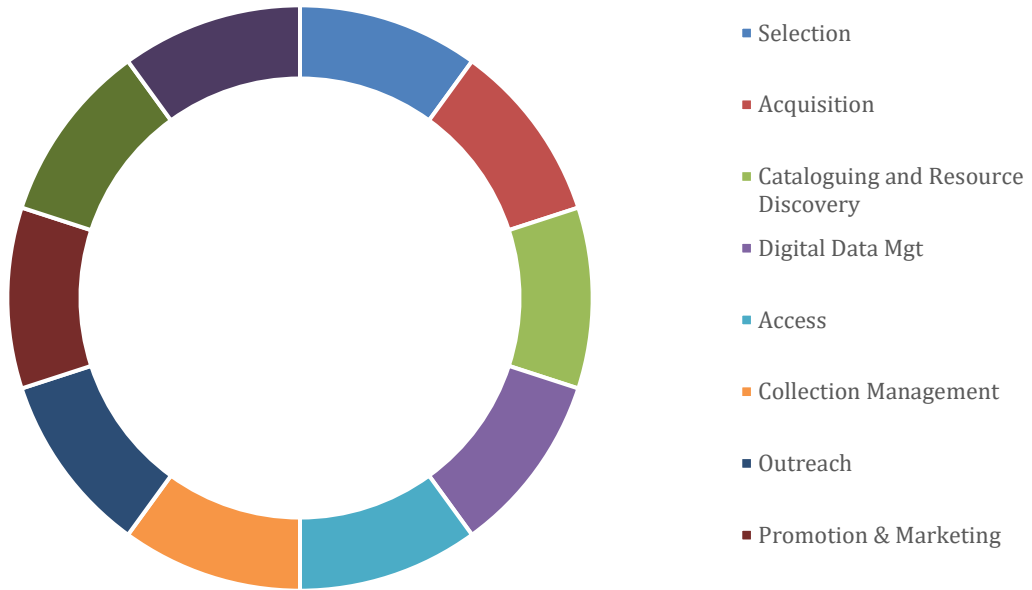
Deaccessioning within special collections repositories is not a common practice. However, special collections libraries may have the need to deaccession materials due to duplication of items (particularly of high value), the closure of an institution, the repatriation of cultural heritage materials, the reappraisal of unused or out-of-scope materials, or for a number of other reasons not cited here. Materials to be deaccessioned may be returned to the donor, transferred to other scholarly institutions, offered for public sale or destroyed. In such instances, decisions about deaccessioning items, particularly those with significant research or financial value, must be conducted in an ethical way with due consideration of relevant factors. Special collections professionals must have the background and skills needed to assess the materials to be deaccessioned in order to properly determine their disposition.

### **Competencies:**

1. A special collections professional determines if any internally imposed restrictions such as institutional stipulations or externally imposed restrictions such as donor or other legal issues would prevent materials from being deaccessioned. Reasonable attempts are made to contact the donor when materials are considered for deaccession.
2. Determines if on-loan or semi-permanent loan agreements stipulate the circumstances under which owners may withdraw collections and have the materials returned to them.
3. Uses collection development policies to determine if materials fall outside of the scope of current collecting practices.
4. Determines if material is a duplicate and/or duplicates information already held in the library or elsewhere in another format.
5. Ensures appraisal reports are included with deaccessioning selection decisions.
6. Conducts condition surveys to assess the state of materials to determine if they have deteriorated beyond usefulness and requires preservation or conservation treatment that is prohibitively expensive.
7. Knowledgeable of international, national and local legalities concerning restitution and repatriation of cultural heritage materials. Works with appropriate authorities to resolve any issues that arise affecting the collection.
8. In the event of the closing of an institution, is aware of the appropriate legal framework or professional guidelines for the dispersal of items or collections.

9. Determines the impact of deaccessioning items on public access to the information. When possible, makes recommendations for the relocation of deaccessioned materials to other institutions.
10. Deaccessioned materials should be clearly marked (with stamps or seals) to indicate they are no longer part of a specific collection or institution.

### Special Collections Lifecycle



## 4. Professional Formation: Education and Training

### Formal Education and Training

Special collections professionals come into this field of librarianship from varying backgrounds. There is a global diversity of routes into special collections librarianship with some countries and sectors emphasizing scholarly expertise while others emphasize general professional qualifications. Formal education or training may consist of library or archival undergraduate or post-graduate course work resulting in a diploma or terminal degree which may be required for employment in certain institutions. Informal education or training may consist of practical work experience or professional development activities, workshops or conferences. Regardless of the path taken, the training of special collections professionals should encompass library or archival methods and theories and the disciplines within the humanities or liberal arts studies that will prepare the librarian, archivist, or technician for the work and idiosyncrasies associated with such materials.

### Competencies:

1. A special collections professional understands libraries are cultural memory institutions and the materials they house are of importance to preserving the world's collective cultural and intellectual heritage.
2. Possesses a working knowledge of the basic history, theory, and best practices relating to materials found in special collections libraries. Able to work with materials in different physical formats including printed books, manuscripts, archival materials, ephemera, works on paper (photographs, prints, maps and other graphic works), audio-visual materials, digital media, artwork, artifacts and 3-D objects, cultivating, at the same time, a personal main area of competence.
3. Knowledgeable of the history of the book, the book arts, history of printing, book production, book publishing, and book terminology.
4. Develops and maintains knowledge of production methods used to create archival and non-print materials by various physical, photographic, and digital processes.
5. Knowledgeable of book and archival processing and cataloguing procedures based on current methods and theories. Understands the concepts of respect des fonds, provenance, and the need to maintain original order when processing archival collections.
6. Develops specialized competencies in particular areas of practice as necessary for responsibilities (e.g., collection development, description and access, teaching and learning, preservation, information technologies, data management, and digital technologies).
7. Knowledgeable of professional standards for the public use, handling, housing and storage procedures of special collections materials.
8. Knowledgeable of current library and archival preservation and conservation standards, techniques and practices.
9. Possesses the historic knowledge and linguistic skills needed to process, interpret and promote their collections.

10. Develops management skills for strategic planning, supervision of staff, and workflow organization, for recruiting and training staff, and for developing practical and economical business and cost models used to evaluate projects.

### **Informal Education and Training: Continuing Education and Professional Development**

Special collections professionals must be committed to a career of lifelong learning and engage in continuing education activities. They must seek professional development opportunities inside and outside of their organizations in order to expand their foundations of knowledge and stay current with trends, methods, theories, best practices, and new technologies.

#### **Competencies:**

1. A special collections professional enrolls in post-graduate college or university level work related classes, attends extension courses and/or workshops to acquire necessary skills.
2. Engages with professional organizations. Attends and/or presents papers on work related topics at professional conferences, meeting or seminars.
3. Stays current with the professional literature, in print or online. Publishes in professional journals when appropriate.
4. Knowledgeable and inquisitive of other institutions' special collections libraries.
5. Provides leadership and mentors colleagues within the professional community.
6. Supports professional development for all staff.

## 5. Professional Ethics

Special collections professionals work in memory and culture institutions and hold positions of trust. As stewards of cultural heritage materials, these professionals are responsible for the care, preservation, access, security, and administrative duties associated with such materials. These professionals adhere to a set of core values that serve to guide them in their practices and activities.

### Competencies:

1. A special collections professional adheres to codes of professional conduct that govern special collections work. Understands that special collections work must be done in an ethical way, and that explicit codes of ethics for special collections professionals and archivists exist for reference.<sup>7 8</sup>
2. Employs effective and ethical acquisition methodologies based on knowledge of the wide range of acquisition methods (auctions, book fairs, sale catalogues, direct offers by book sellers, private collectors, public institutions) in accordance with institutional, professional and ethical standards and values.
3. Understands the provenance of collections being considered for acquisition so illegally acquired materials can be identified and avoided.
4. Ensures materials are processed and described in a timely manner. Provides bibliographic information to the public through the institution's information system, digital repositories or other platforms so as to avoid creating hidden collections or materials that cannot be discovered or used.
5. Provides access to all materials unless restricted by law, donor agreements or institutional access policies.
6. Provides assistance to all inquiries and maintains the confidentiality of researchers and their work.
7. Ensures proper custodial care for the materials entrusted to him or her.
8. Avoids conflicts of interest and appearances of conflicts of interest.
9. Works collaboratively with other collecting institutions.
10. Works in a collaborative, consultative way with the communities who created the collections, for example, indigenous peoples or minority communities.
11. Understands and adheres to all local, national, and international laws.
12. Understands and respects national and international laws relating to intellectual property and copyright relevant to special collections.

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<sup>7</sup> Rare Books and Manuscripts Section, Association of College and Research Libraries. *ACRL Code of Ethics for Special Collections Librarians (2003)*. Accessed February 24, 2019. [http://rbms.info/standards/code\\_of\\_ethics](http://rbms.info/standards/code_of_ethics).

<sup>8</sup> Society for American Archivists. *SAA Core Values Statement and Code of Ethics (2011)*. Accessed February 24, 2019. <http://archivists.org/statements/saa-core-values-statement-and-code-of-ethics>.

# Appendix 1

## Criteria for Determining Special Collections Status

The following criteria for evaluating special collections materials have been adapted from the *ACRL Guidelines on the Selection of General Collection Materials for Transfer to Special Collections* (2008).<sup>9</sup> The examples listed for each criterion are for informational purposes and should not be considered as the only or definitive exemplars of the different characteristics. It is important to note that as values and circumstances change over time, each institution should periodically review its policies to ensure it has current and effective special collections criteria for its selection process. Also, these criteria are for all formats of books including codices and scrolls. They can also be used when evaluating non-book items for special collections libraries such as archival or historical collections, print and non-works, ephemera, photographs, prints, maps and other graphic works; audio-visual material in all formats; born-digital and digitized media; art objects and three-dimensional (3-D) objects deemed irreplaceable or considered to be unusually rare and invaluable.<sup>10</sup>

1. *Market value* The market value of an item or a collection is the highest estimated price that a buyer would pay, and a seller would accept for an item in an open and competitive market. Books with high market values are at a greater risk for theft. In order to protect their resources, special collections libraries often impose an upper monetary limit or threshold value of a book for its inclusion into a special collection. Books with high monetary values at or above the threshold level are automatically considered for inclusion into a special collections library. The threshold value should be reviewed periodically and adjusted as needed.

2. *Rarity and Scarcity* ACRL's guidelines define rarity as "not found in large numbers and consequently of interest or value." A "scarce" item is defined as "insufficient for the need or the demand." For example, books printed in limited editions are considered to be rare because they were originally produced in limited quantities. However, books become scarce as a result of human actions or any number of natural or catastrophic factors. Books, maps, manuscripts, ephemera, audio-visual, or 3-D materials that meet these criteria and determined to be rare or scarce are usually selected for a special collection.

Examples of rarity include:

- Fewer than ten copies discoverable in print or electronic databases (The number of discoverable copies varies between institutions as certain libraries may use 5 copies as the deciding criteria whereas others might use 15 copies as the upper threshold)
- Books, maps, broadsides or ephemera printed in limited editions or quantities of 100 copies or less
- Fewer than three copies of an item held in a consortium or a geographic region
- Unique photographs or audio-visual recordings
- Expeditions notes or journals

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<sup>9</sup> Rare Books and Manuscripts Section, Association of College and Research Libraries. *ACRL Guidelines on the Selection of General Collection Materials for Transfer to Special Collections* (2008). Accessed February 24, 2019. <http://www.ala.org/acrl/standards/selctransfer>.

<sup>10</sup> Rare Books and Manuscripts Section, Association of College and Research Libraries. *ACRL Guidelines: Competencies for Special Collections Professionals*. Accessed February 24, 2019. <http://www.ala.org/acrl/standards/comp4speccollect>.

Examples of scarcity include:

- Private or personal archives or papers
- Books not usually found for sale
- Privately printed editions such as family histories or memoirs
- Books and other materials of local interest, local history, or by local authors
- Posters, signs, or broadsides

3. *Date and Place of Publication* A book's imprint (date and place of publication) is an important criterion for it places a book in time and space. In general, the older a book is, the more value and significance it is given by special collections professionals. For example, codices produced prior to the sixteenth century will always be considered rare given their age and the technology used to create them. For the printed word, books identified as incunabula (early printed works) will always be categorized as rare materials. In Europe, books printed between 1450 and 1500 AD are identified as incunabula as they represent the first generation of a new print technology: movable type and the printing press. However, in East Asia, the earliest examples of incunabula including wood block printing (Korea, 751 AD) and metal (Korea, 1234 AD), clay (China, 11<sup>th</sup> century) and wood (China, 1297 AD) movable type printed text significantly pre-date western incunabula by several centuries. Dates for incunabula will vary as printing traditions developed independently in different geographic locations and at different times resulting in regional incunabula.

A location by itself can be a helpful but minor criterion—Dunhuang, Goa, Leiden, Mexici, Moguntiacum, Venezia, or Westmynstre---as it provides a geographic context. However, a location combined with a date provides the necessary historical background information for a proper evaluation. For example, a book with Mexici as a location and a date between 1536 and 1560 would be considered one of the earliest printed books in the Americas, and most likely attributable to the printer, Juan Pablos. A book with the date 1484 and Westmynstre in its colophon would be recognized as one from Wylliam Caxton's print shop, and example of one of the earliest printed books in England. Finally, a book with Augsburg and 1484 in its colophon may be the work of Anna Rügerin, the first female typographer. Date and location can effectively establish the provenance of each work and aid in their identification and evaluation.

4. *Physical and Intrinsic Characteristics* Certain physical and intrinsic books characteristics that set a book apart from others are often used to determine its rarity. It could be a Ming dynasty chop seal, the signature of a significant historical figure, the stamp, supralibros or bookplate of a famous collector or library, a specific bookseller's ticket on the paste-down, a late 18<sup>th</sup> century tree calf binding, or any characteristic that meets a special collections professional's standards or a collection's profile.

Examples of physical and intrinsic characteristics include (but not limited to):

- Illuminated manuscripts
- Calligraphic scrolls or works
- Works attributed to identified specific scribes (e.g., Lúcas Ó Dalláin, Stanislav of Lesnovo, or Adam Pynkhurst), calligraphers (e.g., Ibn Muqla, Wang Xizhi, Kim Jung-hee, Hon'ami Kōetsu), illuminators (e.g., Anastasia, Zanobi Strozzi) or artists (e.g., Wen Peng, Pol and Hermann Limbourg, Andrew Wyeth)
- Works from specific printers or printing houses (e.g., Elzevir, Anna Fabri, Charlotte Guillard, Johann Guttenberg, Aldus Manutius, Anna Rügerin of Augsburg)
- Maps attributed to specific printers, workshops or expeditions
- Books with decorated end papers (e.g., block printed, marbled, illustrated)



- Books with maps, engraved plates, unbound plates, original art or photographs
- Books with original paper wrappers or dust jackets
- Books with unique, vellum or decorative publisher's bindings (e.g., Coptic bindings, palm leaf bindings, wooden board books, cloth embroidered bindings)
- Unique volumes (e.g., extra-illustrated books or hand-created compilations)
- Books with moveable parts, pop-ups, or foldouts (e.g., early science or medical books)
- Books made by hand or of unusual material (e.g., artists books)
- Books/objects in non-standard sizes or shapes (e.g., scrolls, miniature books, girdle books, elephant folios)
- Scrapbooks, photograph albums, and manuscript (handwritten or typed) materials
- Books and other materials with significant provenance or evidence of association (including binders' tickets, bookplates, inscriptions, Chinese chops, and marginalia)
- Printed works including broadsides, posters, printed ephemera, maps, woodblock prints and original art (print and non-print)
- Prints attributed to specific artists or engravers
- Photographs attributed to specific photographers or time periods
- Musical recordings attributed to specific artists or time periods
- Films attributed to specific artists or directors or time periods

5. *Condition* While a book's condition is a relative or subjective value it is still a key criterion. This criterion sets both the demand and the monetary basis for the book's evaluation. Intact books in excellent, nearly new or fine condition<sup>11</sup> with original bindings are highly desirable and sought after by libraries, dealers and collectors, and as a result, these buyers will pay premium prices for them. Books that are soiled, water stained, have been repaired, rebound, are missing pages, have loose, missing boards or otherwise in less than a pristine state are usually less desirable, and their market values are usually adversely affected. However, as this is a subjective value, if a book is a damaged Gutenberg Bible, a 14<sup>th</sup> century text on medicinal remedies from the Yuan Dynasty or a Timbuktu manuscript, such a historically significant work will still retain a high market value, though probably not as high as a copy in better condition. Overall, preference is given to works in fine, good, clean or satisfactory condition than to their lesser counterparts in poor, damaged or soiled condition.

6. *Bibliographic and Research (historical, cultural or intellectual) Value* This criterion contains types of works often overlooked: government documents, gray literature and other books valued for their historical, cultural or intellectual significance. While some of these primary sources may have been digitized or are available as reprints, the original editions have substantive significance to researchers.

Examples of works with bibliographic and research (historical, cultural or intellectual) value include:

- Select federal, state, and local government documents (e.g., general holdings such as The India Office Records or the Archives nationales d'outre-mer records or specific titles such as *"Titanic" Disaster: Hearings before the Subcommittee of the Committee on Commerce United States Senate, pursuant to S. Res. 283 directing the Committee on Commerce to investigate the causes leading to*

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<sup>11</sup> For book condition descriptions, see John Carter, revised by Nicholas Barker. *ABC for Book Collectors*. New Castle, Delaware : Oak Knoll Press. 1998.

*the wreck of the White Star Liner "Titanic,"* S.Doc. 726, 62nd Congress, 2nd sess. (1912).  
Washington, D.C.: Government Printing Office.)

- Nineteenth-century scientific discoveries and expeditions
- Government publications containing maps or plates
- Ethnographic reports
- Primary source materials produced during major historical events.
- Censored, repressed, or challenged books
- Books of a significant importance to a field of study or genre of literature
- Gray literature or documents produced for use by a private organization (e.g., theses, dissertations or studies conducted by contractors for the World Bank)
- Auction catalogs, reference works and certain journals

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- Acquisition and Collection Development
- Art Libraries
- Continuing Professional Development and Workplace Learning Section
- Local History and Genealogy
- National Libraries
- Preservation and Conservation

And these IFLA Special Interest Groups:

- New Professionals
- Digital Humanities – Digital Scholarship

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