

# WRLC Retention and WRLC Permanent designation in Alma

## Overview

Within our consortium's Alma system, items that are designated for **WRLC shared retention** or **permanent retention** are identified directly in the **Item Record** using Alma's retention commitment fields.

These fields allow participating WRLC institutions to indicate materials that are committed to long-term retention as part of the consortium's collection management strategy.

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## Designation Criteria

Items are designated as **WRLC Retention** or **WRLC Permanent** by **WRLC Headquarters (HQ)** as part of consortium-level collection analysis and retention initiatives.

Retention designations are applied only to

1. Items NOT located in the [Exclusion List for WRLC Retention Designation](#), and
2. Within participating institutions.

### WRLC Retention

- Assigned to **one copy of each specific edition of a monographic title**.
- Matching of unique title editions is based on the **Network ID number** in Alma.

### WRLC Permanent

- Assigned to **monographs published prior to 2005**.
- Titles qualified if there were **ten or fewer copies in the United States listed in WorldCat** at the time of the original collection analysis.
- This analysis was conducted as part of the **WRLC Sustainable Collection Services (SCS) Project** in 2014.

For additional background, see the [WRLC Sustainable Collection Services Project 2014 Final Report](#).

*Note: Some sections of the report regarding the number of retained copies and item tagging procedures have since been updated and replaced by current practices.*

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## Shared Collections Facility Policy for WRLC Retention items

To support long-term preservation while minimizing unnecessary duplication, the WRLC repository maintains **one copy of each specific edition of a print monographic title** in retention-eligible locations.

- **No print monograph may be added to the repository if the same edition (i.e. if a WRLC Retention or Permanent item) is already stored in a retention-eligible location.**
- These restrictions apply **only to locations designated as eligible for WRLC retention participation** (see the [Exclusion List for WRLC Retention Designation](#)).

Items stored in **non-retention locations** are **not subject to this restriction**. For example, an institution may retain multiple copies of a title in a **Special Collections or Rare Books location at the Shared Collections Facility (SCF)** if that location is not designated as retention-eligible.

For more information, please see the [Shared Collections Facilities Policies page](#) of the WRLC Alma Wiki.

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## How Retention Is Indicated in Alma

Items that are part of the WRLC retention program are marked in the **Item Record** with the following values:

- **Committed to Retain:**
- **Retention Reason:**
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The selected **Retention Reason** identifies the type of retention commitment for the item.

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## Where to Find This in the Item Editor

Retention Information
▼

Committed to Retain  No  Yes

Retention Reason  Retention Note

↑

In the **Alma Item Editor**, the retention designation appears in the **Retention Information** section of the item record.

Staff can view the following fields:

- **Committed to Retain**
- **Retention Reason**

If an item has been designated as part of the WRLC retention program, **Committed to Retain** will be set to **Yes**, and the appropriate **Retention Reason** will be selected.

## Retention Reason Configuration

For each participating **Institution Zone (IZ)**, two retention reasons are configured in the **Item Retention Reason Code Table**, found in Configuration > Resources > Collection Retention > Item Retention Reason

These configuration entries control the retention options available in the item record.

Description	Code
WRLC Retention	WRLCRetentionDONOTDELETE
WRLC Permanent	WRLCPermanentDONOTDELETE

Retention Reason
Save

Values Notes

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Filter: English

Code	Description	Translation	Default Value	Updated By	Last Updated
WRLCRetentionDONOTDELETE	WRLC Retention	WRLC Retention	<input type="radio"/>	WRLCadmin	10/04/2022
WRLCPermanentDONOTDELETE	WRLC Permanent	WRLC Permanent	<input type="radio"/>	WRLCadmin	10/04/2022
LibraryLastCopy	Library's last copy	Library's last copy	<input type="radio"/>	WRLCadmin	10/04/2022
InstitutionLastCopy	Institution last copy	Institution last copy	<input type="radio"/>	WRLCadmin	10/04/2022

The **Description** values appear in the **Retention Reason** dropdown within the Alma item editor.

The **Code** values are the underlying system identifiers and **should not be modified or deleted**, as they support the WRLC retention workflow.

# Participating Institution Zones

The following Institution Zones participate in the WRLC retention project:

- American University
- Catholic University of America
- Gallaudet University
- George Washington University
- Georgetown University
- Howard University
- Marymount University
- University of the District of Columbia

*Please note that neither George Mason University nor any of the specialty libraries (Law and Health Sciences) participate in the WRLC retention program.*

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## Important Notes for Catalogers and Staff

- **Retention designations are assigned by WRLC HQ.**  
Local staff should **not manually assign or remove** the **WRLC Retention** or **WRLC Permanent** designations unless directed by WRLC HQ.
- If an item that is marked **WRLC Retention** or **WRLC Permanent** becomes **lost, damaged, or missing**, please open a **WRLC Service Desk ticket** so that HQ can review and reassign the retention commitment if necessary.  
Email: [servicedesk@wrlc.org](mailto:servicedesk@wrlc.org)

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## Resources

- [Shared Collection Print Monograph Retention Memorandum of Understanding \(2024 Update\)](#)
- [WRLC Sustainable Collection Services Project 2014 Final Report](#)
- [Shared Collections Facilities Policies](#)
- [Exclusion List for WRLC Retention Designation](#)

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