

## **Library Gift Policy for Archival and Published Materials**

March, 2011

### **1.0 GENERAL**

Over the years, many thoughtful donors have made donations of gifts-in-kind to the University of Guelph Library, and the University is deeply grateful for their gifts.

In the future, the University will undoubtedly be offered additional collections of books and other library materials, and it feels a high sense of responsibility in accepting such gifts. This responsibility carries with it the obligation to inform potential benefactors of some of the principles that have emerged from its experience in receiving Library gifts. The following comments, therefore, are presented for the guidance of persons who may be considering gifts to the Library.

1.1 The Library welcomes inquiries from individuals regarding potential donations of academic library materials, as these are an important way of growing and enriching the Library's collections (especially archival and special collections). In order to best match donations with the University's current needs, all potential gifts-in-kind, including books, published materials and manuscript and archival materials, will be evaluated in terms of their alignment with the Library's collection development goals e.g. their potential for supporting the research and learning missions of the University. Donations are also an important way for the Library to connect with and cultivate ongoing or potential relationships with our donors, and these relationships form part of the context for evaluation of collections when they are offered.

1.2 The University of Guelph Library applies the same principles of selection in considering gifts as it does to books it buys. All gifts accepted by the Libraries should contribute either directly or indirectly to the program of teaching, research, and service of the University. Priority will be given to those potential gifts which are unique, rare, have significant provenance or those that complete or complement existing collections, especially in the following areas:

- Agriculture and Plant Science
- Animal Science and Zoology
- Campus history and publications
- Canadian Theatre
- Culinary publications
- Landscape Architecture
- Local/Regional History
- Pre-1900 Canadiana
- Scottish materials
- Veterinary Science

1.3 Donations of books sometimes raise problems which require mutual understanding to assure maximum usefulness of such gifts. The University welcomes gifts of books that enrich Libraries resources, but because the Library already has strong, basic holdings in most subject fields, a gift of books is most effectively administered if the librarian can be empowered to not accept or to

dispose of volumes, such as duplicates, for which the Library has no foreseeable need. The cataloging, storing and servicing of library books requires significant expenditure of time and money, and the Library cannot undertake substantial commitments to process and maintain items it does not need. It is hoped that donors will appreciate this fact since any given collection is likely to contain items of which the Libraries already has sufficient copies at hand. The need for funding to support the costs of processing gift collections is also an important part of the discussion which Library and Alumni Affairs and Development staff should have with donors who are offering major gift-in-kind collections to the Library.

In addition to duplicate titles, the following are examples of other types of materials the Library will not accept for the circulating collections:

- General textbooks and course workbooks
- Popular paperbacks (especially mass market publications)
- Photocopies or other reproductions/reprints
- Inspirational literature
- Outdated or superseded titles or editions
- Computer software
- Popular magazines (e.g. National Geographic, Time etc.)
- Newspapers
- Partial runs of periodicals not already held in the Library's collections
- Physically damaged items or material in poor condition; exceptions may be made for rare or archival materials

1.4 Sometimes, out of a natural desire to make sure that their gifts will permanently fulfill the purposes they intend, donors offer the University a collection of books or archival materials subject to certain specific limitations or conditions. Over time, the Library will very likely need to respond to changes in the University's role and needs by making changes to its areas of collecting emphasis, types of services offered, and space use. Since these adjustments can rarely be foreseen far ahead, rigid restrictions over the receipt of a gift can sometimes prevent the maximum utilization of a collection or monetary bequest. For this reason, it is generally preferable to rely on the Library's long-term mission of stewardship and client service to guarantee the responsible management of gifts for the benefit of generations to come, rather than establishing rigid conditions over any given collection or contribution. Therefore, with the exception of archival collections of significant value or importance, the Library will not accept gifts on which a donor places restrictions that will negatively affect the use of the materials.

## **2.0 PROCESS FOR ACCEPTING GIFTS**

2.1 All offers of gifts-in-kind of books and other published materials should be directed to the Head, Information Resources or his/her designate. All offers of non-published materials (archival or manuscript items) should be directed to the Head, Archival & Special Collections. Current contact information for these individuals is:

### **Head of Information Resources or designate**

*Current designate is*

**Helen Salmon**

Information Resources Librarian

Ph. 519-824-4120 Ext. 52121

[hsalmon@uoguelph.ca](mailto:hsalmon@uoguelph.ca)

**Kathryn Harvey**

Head, Archival & Special Collections | Library

Ph. 519-824-4120 Ext. 52089

[kaharvey@uoguelph.ca](mailto:kaharvey@uoguelph.ca)

2.2 While welcoming gifts which will enrich the Library's collections, we nonetheless strongly discourage "dropping off" of materials without prior arrangement, as the costs of disposing of unwanted materials is very high and sometimes a donation which is offered should more properly be referred to another academic institution or museum. The donor should be directed to contact one of the individuals listed in 2.1 above to discuss their donation; this is an important way of screening incoming gifts, but also an ideal opportunity to begin building a relationship with the potential donor. The Head of Archival and Special Collections and the Head of IR (or designate) will work with the Senior Development Office for the Library and the College of Arts, and with the Chief Librarian, to report on and help to cultivate all significant donor contacts arising through gift donations. This will facilitate appropriate recognition of major gifts, linking of Library gift donations with other connections that the donor may have to the University of Guelph, and ongoing stewardship of donors to the University.

2.3 If the collection being offered is deemed to be of interest to the Library, the donor will be asked to provide a full description (an itemized list) of their intended donation so that it can be fully considered in relation to the University of Guelph's academic programs and existing collections. The Library may, if the value of the gift to the library or the scope of the collection warrants it, undertake an on-site evaluation of the collection by library staff before a determination to accept can be made.

**3.0 PROCESS FOR EVALUATING GIFTS**

3.1 All gifts shall be evaluated in light of the criteria outlined in Sections 1.2-1.4.

3.2 An Information Resources team librarian and/or the Head, Archival & Special Collections will evaluate gift collections which have been provisionally accepted by the Library, and will make the final decision as to which individual items within the collection will be processed and added to the Library's collections. When specialized knowledge is required to evaluate a gift, library staff may consult with members of the faculty or others with appropriate expertise. Items received as gifts-in-kind which are not deemed to be appropriate acquisitions will not be added to the collections and will be disposed of as described in section 5.0 below. Print maps and AV materials will not normally be accepted as gifts-in-kind donations because these formats have specialized copyright (Public Performance Rights) restrictions and/or will require ongoing investment in format migration.

3.3 In accordance with Canada Revenue Agency regulations, and, if deemed necessary, an external appraiser approved by the University (a reputable book dealer or member of the National Archival Appraisal Board) will appraise donations valued at more than \$1000. Donations valued at under \$1000 may be appraised by the Head, Archival & Special Collections or designate. Due to the cost of preparing the paperwork and evaluations for income tax receipts, the Library will not provide receipts for valuations under \$200.

3.4 The donor must indicate whether or not he/she is requesting a tax receipt on their signed donation form at the time of submission.

#### **4.0 TERMS OF ACCEPTANCE**

4.1 When the Library accepts a gift collection, the donor may have confidence that it will be administered according to the following principles: (1) conscientious effort to assure good physical care to all library materials thus secured; (2) physical arrangement that will make the gift available to faculty, students, or visiting scholars under conditions of responsible use; (3) maintenance of catalogs and other records prepared according to the best practices of librarianship or archival management; (4) future acquisition of materials supplementary to those obtained by gift, as funds permit and in alignment with then-current Library emphases of collecting.

4.2 If appropriate, for large and valuable collections, and as determined by the Head of Information Resources in consultation with the Head of Archival and Special Collections (or their designates), the donor will be asked to sign a Deed of Gift provided by the Library, and the gift then becomes the property of the University of Guelph.

4.3 Tax certificates will be issued in accordance with the Cultural Property Export and Import Act and the Income Tax Act. Normally, tax receipts or certificates will be issued for the calendar year in which the gift is received.

4.4 Gift materials will be acknowledged through a note added to the online catalogue record, through a notice on the Library's donor webpage, and (for significant gifts or with major donors) with a personal acknowledgement of thanks from the Chief Librarian and the Senior Development Officer for the Library and the College of Arts.

4.5. Due to space considerations and the subject arrangement of the library's resources, donors of books should be aware that it is rarely practicable to maintain separate collections.

#### **5.0 DISPOSITION OF GIFT MATERIALS**

5.1 Subject to the terms of any deed of gift arrangements (see 4.1 above), the Library will only retain those materials it decides are appropriate to add to the collection based on current holdings, other OCUL holdings, and knowledge of Guelph's curricular and research needs.

5.2 If, at any time, gifts are de-accessioned, they will be disposed of in the manner considered most appropriate by the Head, Information Resources or the Head, Archival & Special Collections, and in accordance with the deed of gift agreement with the donor and with their Cultural Heritage status.

5.3 Gift disposal options may include (but are not limited to) the following:

- Donation to other post secondary institutions or libraries
- Book sales to the public†
- Sale to local book dealers†
- Recycling

†Proceeds from any sale of materials will be used to support future library acquisitions, processing of gift collections, or conservation and preservation activities.

5.4 As per the Library's Procedure for Disposal of Library Materials, de-accessioned materials are not normally offered to members of the campus community.