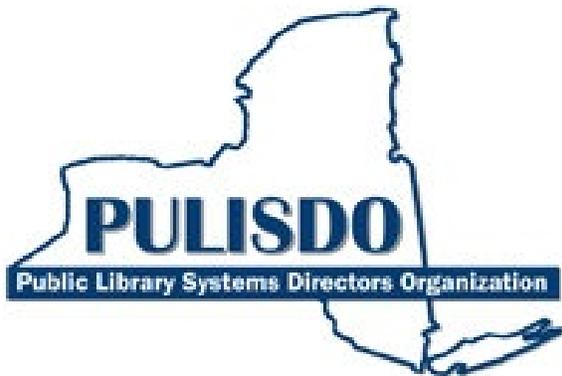


Public Library Collection Management Policy Template and Guide

Presented by:



Empire State
Library Network

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This "Public Library Collection Management Policy Template and Guide" (the "Template & Guide") is maintained by ESLN and PULISDO to assist NY Regents-chartered public libraries as they assess, develop and/or maintain a policy covering all aspects of collection management, including: selection, procurement, cataloging, evaluation, and removal. Areas in grey are spaces where the user should add the library's unique information. To the greatest extent possible, a final version based on this "Template & Guide" should be reviewed by the library's attorney for consistency with its charter, bylaws, other policies, and Plan of Service, before being adopted by trustees.

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Public Library Collection Management Policy Template & Guide

<p>LIBRARY NAME Collection Management Policy</p>	<p>Authority responsible for passing and revising policy: Board of Trustees</p> <p>Authority responsible for updating appendices as needed: Director</p>
<p>Date adopted: DRAFT</p>	<p>Most recent review by the board of trustees conducted on: DATE</p> <p>Most recent update of appendices done on: DATE</p>

I. Purpose

This "Collection Management Policy" (the "Policy") sets the NAME Library's policy and procedures governing:

- Selection
- Procurement
- Cataloging
- Evaluation
- Removal

of "Library Resources" as defined in this Policy.

The purpose of this Policy is to position the Library to assure its community, and relevant oversight authorities, that the Library's collection management practices meet the needs of the community served by the Library, uphold the Library's mission, and comply with relevant law and regulations.

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II. Definitions

Because the management of Library Resources by a NY Regents-chartered library is controlled by law, regulation, and Regents' policy, this Policy uses the following precise terms, drawn from those laws and regulations, to define specific concepts critical to orderly and compliant collection management:

(the) Library: The NAME Library, which is a [insert library type] chartered by the Regents in [year].

(the) Charter: The most recent version of the document that creates the Library, as approved by the Regents.

Area of Service: The precise, geographically-defined community served by the library, as described in its Charter and Plan of Service and any contractual or policy arrangements.

Trustees (or the "Board"): The members of the Library's governing board, responsible for setting Library policy and hiring the Library [Director].

Library Director: The professional hired by the Trustees to lead the library and supervise all other library employees. The minimum qualifications of a library director are set by 8 NYCRR 90.8, and include educational and continuing education requirements set by 8 NYCRR 90.7.

Library Resources: As defined by 8 NYCRR 90.3, "Library Resources" means "the print and nonprint materials owned by the library and any other services provided by the library to the resident borrowers of the Library's Area of Service." In this Policy, Library Resources held by the Library are collectively referred to as the "**Catalog**" or "**Collection Materials**."

Collection Management: The overall term for the selection, procurement, cataloging, evaluation, and removal of Library Resources.

Selection [of Library Resources]: The process by which Library Resources are chosen by Library staff (see "Selection Criteria" below), based on the Library's budget and through use of vetted materials.

Selection Criteria: The criteria determined by the Director and other Library staff, based on the goals and identified community needs in the Library's Long-Range Plan adopted by the Board, that must be met by the Collection.

Procurement: The process by which selected Library Resources are purchased. Procurement is governed by a combination of law, regulation, and Library policies,

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including: [insert name(s) of fiscal and procurement-related policy/ies]. For certain purchases, it may also be governed by grant terms required by funding sources.

Cataloging: The process by which purchased items are formally added into the Library's collection. "Cataloging" includes how selected materials are listed in the [insert specific catalog resources, such as ILS] and in what section of the Library they are placed (where they are "shelved").

Evaluation: The process by which collection materials are periodically reviewed to ensure they remain physically intact, relevant, and meet "community needs" as required by 8 NYCRR 90.2(6).

Request for Re-Evaluation: The formal process by which any trustee, library employee, or individual served by the Library [either by residing in the Area of Service, or being served by the INSERT Library System] may request re-evaluation of a Library Resource being included in the Library's Catalog, per the library's Selection Criteria.

Long-Range Plan: A community needs-based, board-approved, written long-range plan of service developed by the Library Trustees and staff. As required by 8 NYCRR 90.2, the Library's Long-Range Plan includes the goals and identified community needs that must be met by the Library's Collection.

Annual Report (to community): An annual report to the Library's community setting forth the Library's progress in meeting its mission, goals, and objectives, as outlined in the library's Long-Range Plan. This requirement became law in 2021.

Annual Report (to Education Department): An annual report to the State Education Department, required by 8 NYCRR 90.1 and the NY Education Department's Division of Library Development.

Record Retention Period: How long different records pertaining to actions under this Collection Management Policy are retained, after which they are purged. [**Choose:** As a public library, the Library follows the record retention periods in the LGS-1. **OR** As the Library is an association library, the Trustees set this policy.]

Donated Materials: Books or other materials that are donated to the Library. These items are not immediately added to the Collection; they are evaluated according to the same Selection Criteria that are applied to purchased material. Donated Materials which do not meet the library's Selection Criteria will be disposed of at the discretion of the Library.

Accession: "Accession" is a term not defined by law or regulation in New York, but is used by libraries, museums, and archives to refer to collection development where the origins ("provenance") of the item is relevant. As noted in the LGS-1, "some libraries

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"accession" manuscripts, rare books and special collections, but not their general library holdings." This policy does not address "accession"; if your library has a collection of rare items and/or archives, it should be governed by a separate policy.

III. Collection Management

A. Selection

The Selection Criteria of the Library, as informed by the Long-Range Plan approved by the Trustees, are attached as Appendix "A."

Selection Criteria are set by the Director.

Selection Criteria are maintained as a schedule to enable ease of amendment and flexibility with respect to evolving community needs.

It is expected, but not required, that Selection Criteria as set forth in Appendix "A" may be updated more frequently than this Policy. Such revision does not require approval by the Board.

Records management: records pertaining to Selection of Library Resources are kept for 0 years after no longer needed (see LGS-1 #600).

B. Procurement

The Procurement of selected Library Resources by the Library is governed by the Library's [insert policy name] policy.

At all times, the Director and the Board distinguish between Selection and Procurement. "Selection" is how Library Materials are chosen; "Procurement" is how they are purchased using library funds (for example, Donated Materials are not procured).

Records management: records pertaining to Procurement of Library Resources are kept for 1 year (see LGS-1 #599).

C. Cataloging

The procedures for Cataloging the Collection of the Library, as informed by the Library's Long-Range Plan, are attached as Appendix "B."

The procedures for Cataloging are set by the Director, as informed by the Long-Range Plan approved by the Trustees, and the Director's familiarity with current relevant standards as set by the Library and the library and information management profession.

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The procedures for Cataloging are maintained as a Schedule to enable ease of amendment and flexibility to evolving community needs.

It is expected, but not required, that the procedures for Cataloging may be updated more frequently than this Policy. Such revision does not require approval by the Board.

As required by 8 NYCRR 90.2, the Library provides a circulation system that facilitates access to the Library's Collection as cataloged after selected materials are acquired.

Records management: as the final cataloging is set out in the Catalog, records pertaining to the procedures for Cataloging are kept for 0 years (see LGS-1 #62). Printed manuscript or published library catalogs are kept permanently; continuously updated library catalogs (such as databases) are kept until updated (see LGS-1 #598).

D. Evaluation

1. Routine Evaluation

As required by 8 NYCRR 90.2(6), Library Resources in the Library's Collection are routinely evaluated to ensure the Collection meets community needs; to ensure routine evaluation, the Library Director oversees such evaluation per the schedule attached as Appendix "C."

The Director reports to the Board on the routine evaluation of Library Resources not less than annually.

Routine evaluation decisions are often affected through a process referred to as "Weeding" the Library's procedures for Weeding are included in Appendix "C."

Records management: records pertaining to Routine Evaluation are kept for 0 years after no longer needed (see LGS-1 #600).

2. Request for Re-Evaluation

A trustee, employee, or person served by the Library (a "Request-Maker") may request that the Selection or Cataloging of a Library Resource or Resources be re-considered.

To initiate a Request for Re-Evaluation, the Request-Maker may fill in the "Request for Re-Evaluation" form attached as "D." **Only the factors listed in the form are a suitable basis for a filing such a request.**

The procedure for removal based on a Request for Re-Evaluation is addressed in Section III.E.3 of this Policy.

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Materials shall generally only be subject to Re-Evaluation under this sub-section "2" once every 5 years. For repeat requests within 5 years, unless the Selection Criteria have changed with respect to the subject Materials, the prior determination shall be supplied.

Records management: records pertaining to a Request for Re-Evaluation are kept for 6 years (see LGS-1 #601). In addition, also per the LGS-1 #601, because such records deal with serious constitutional issues and may have value for future research, the Library shall appraise such records for historical significance prior to disposition.

E. Removal

Per Education Law Section 260, "*prior to the discarding of used or surplus books or other such reading materials by trustees of a chartered public, cooperative or free association library which receives over ten thousand dollars in state aid, the Trustees shall offer to donate such books or materials to a not-for-profit corporation or political subdivision located within the area of the library system or offer to sell such books or materials to the general public.*" Also as required by law, the Trustees shall retain any proceeds received from the sale of such books and materials for the purpose of maintaining and improving library service within the system.

1. Removal of damaged or technologically obsolete items

Upon finding that a Library Resource is too damaged to be useful or has become technologically obsolete to the point where it can no longer function in the manner intended, the item will be removed from the Collection.

Records management: records pertaining to Removal of damaged or technologically obsolete items are kept for 0 years (see LGS-1 #600).

2. Removal based on Routine Evaluation

Upon finding, after Routine Evaluation, that a Library Resource no longer meets the then-current Selection Criteria (see Appendix "A") of the Library, the item will be removed from the Collection.

Records management: records pertaining to Removal based on Routine Evaluation are kept for 0 years (see LGS-1 #600).

3. Removal based on Request for Re-Evaluation

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If a "Request for Re-Evaluation" form is properly submitted and either the Director, or the Board of Trustees upon appeal, determine that the Library Resource it pertains to should be removed from the Collection, it will be removed from the Collection and the Catalog by the Director (or their designee).

All Requests for Re-Evaluation will be evaluated per the Library's Plan of Service, this Policy, and the following excerpts from the American Library Association's Code of Ethics:

- I. We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.*
- II. We uphold the principles of intellectual freedom and resist all efforts to censor library resources.*
- VI. We do not advance private interests at the expense of library users, colleagues, or our employing institutions.*
- VII. We distinguish between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.*

Decisions shall be communicated using the Appendices "E", "F", and "G", with modifications as determined by the issuing authority.

Records management: records pertaining to Removal based on Requests for Re-Evaluation are kept for 6 years (see LGS-1 #601) and may be kept longer based on a determination of operational or historic significance.

IV. Access to this Policy

To facilitate community understanding of the Library's services, operations, and governance, this Policy and its Appendices shall be posted on the Library's website, available in hard copy at the Library, and a copy shall be provided when a person or authority inquires or raises a concern related to Collection Management.

V. Review and Update of this Policy

This board-approved written policy for Collection Management shall be reviewed and updated by the Trustees at least once every five years (as required by 8 NYCRR 90.3 (b)(4), OR earlier if required by law, OR if a law, regulation, or policy impacting it changes.

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Table of Appendices and Authorities

<p>Appendices</p>	<p>Appendix A: Library's Selection Criteria</p> <p>Appendix B: Library's Cataloging Procedures</p> <p>Appendix C: Library's Routine Evaluation of Collection Materials Schedule & Procedures</p> <p>Appendix D: Library's Request for Re-Evaluation Form and Procedure</p> <p>Appendix E: Template for Director Determination of Request for Re-Evaluation</p> <p>Appendix F: Template for Board Resolution pertaining to Trustees' Determination of Appeal of Request for Re-Evaluation</p> <p>Appendix G: Template for Trustees' Determination of Appeal of Request for Re-Evaluation</p>
<p>Related policies and documents</p>	<p>Charter & Bylaws</p> <p>Library Director Job Description</p> <p>Library's Procurement Policy</p> <p>System Member Agreement and System's Collection-related policies (for example, ILS services)</p> <p>ALA Code of Ethics</p> <p>NYLA Code of Ethics</p> <p>System Code of Ethics</p> <p>Library Code of Ethics</p>

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Controlling laws and regulations	New York Education Law Title I, Article 5, Part 2 8 NYCRR 90.1, 90.2, and 90.3

Appendix "A"

[INSERT Library's Selection Criteria]

Appendix "B"

[INSERT Library's Cataloging Procedures]

Appendix "C"

[INSERT Library's Routine Evaluation of Collection Materials Schedule & Procedures]

Appendix "D"

Form to Request Re-Evaluation of Library Resource

This Request for Re-Evaluation is governed by the Library's Collection Management Policy and the Library's current procedures for Selection and Cataloging.

For current copies of these documents, visit ADDRESS or ask at PLACE for a copy.

To initiate a Re-Evaluation of a Library Resource, please fill out the form and follow the instructions below:

NAME	
Address	
Library Card #	
Catalog # of Material of Concern	

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Title of Work	
Basis of Concern (select all that apply):	<ul style="list-style-type: none"> ○ Does not meet current Selection Criteria ○ Improperly Cataloged (please note specific issue) ○ Does not fall within needs of community
Please include any comments you would like the Library to consider:	Comments:
Date submitting form:	
Signature:	

Instructions and process:

Please only list **one work** per form.

Please submit this form by either emailing it to INSERT, mailing it to INSERT, or faxing it to INSERT.

Your submission will be reviewed by the Library Director within fourteen (14) calendar days of receipt.

You will receive a response in writing that indicates either:

a) your request for Re-Evaluation has been evaluated and no change is required;

OR

b) your request has been evaluated by the Library and the Selection or Cataloging of the item will be changed, which shall be briefly described in the reply.

If the Library determines that no action is needed, and you disagree, you may appeal this determination within fourteen (14) calendar days by submitting a copy of your

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original Request, and the Director's reply, together with statement saying "I request an appeal" to the Board of Trustees by either email to INSERT, fax to INSERT, or USPS to INSERT.

The Board of Trustees is an all-volunteer organization that meets no less than 4 times per year. Therefore, any appeal regarding a Request for Re-Evaluation will be finalized within sixty (60) days. Any material under review will remain in circulation until such time as the Library determines it must be removed.

All Requests for Re-Evaluation will be evaluated per the Library's Plan of Service, policies, and the following excerpts from: [**Choose:** the American Library Association's Code of Ethics **OR** applicable code of ethics for the Library's specific community]

I. We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.

II. We uphold the principles of intellectual freedom and resist all efforts to censor library resources.

VI. We do not advance private interests at the expense of library users, colleagues, or our employing institutions.

VII. We distinguish between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.

The Board of Trustees' determination is final.

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Appendix "E"

Request for Re-Evaluation of Library Resource Form for Notice of Director's determination

Request for Re-Evaluation of Library Resource
Notice of Director's determination made on DATE
Regarding Request for Re-Evaluation of
TITLE, CATALOG NUMBER
Submitted on: DATE

RE: Notice of Director's Determination

Dear NAME:

The NAME Library received your above-referenced Request for Re-Evaluation on DATE.

In evaluating your request, I as Library Director have applied the Library's Collection Management Policy, its Long-Range Plan of Service, and the Code of Ethics of the American Library Association.

Based on that criteria, I have determined that [the Library Resource was properly included in the Library's collection] **OR** [the Library Resource was not properly included in the Library's collection, and will be removed/re-cataloged as INSERT].

The NAME Library strives to meet the needs of everyone in the community, as required by our Long-Range Plan of Service. If you would like to appeal this determination, you may direct your appeal to the Board of Trustees care of NAME at ADDRESS.

Sincerely,

NAME
Director,
NAME Library

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Appendix "F"

Template for Board of Trustees' Resolution pertaining to Trustees' Determination of Appeal of Request for Re-Evaluation

Text of resolution once decision has been reached:

WHEREAS the Board timely received an appeal of the Director's decision attached to this resolution from NAME OF REQUEST-MAKER; and

WHEREAS the Board has evaluated the appeal by applying the factors in the Library's Collection Management Policy, its Long-Range Plan of Service, and the Code of Ethics of the American Library Association;

BE IT RESOLVED that the appeal is [granted, and the item it pertains to is to be removed by the Director per library policy within 5 business days, and the Board shall notify the Request-Maker of this decision within 5 calendar days] **OR** [denied, and the Board shall notify the Request-Maker of this determination within 5 calendar days] as provided by the Library's Collection Management Policy; and

BE IT FURTHER RESOLVED that this Board re-affirms its commitment to New York State Constitution, the United States Constitution, and the American Library Association Code of Ethics, as adopted by the New York Library Association.

AYES:

NAYS:

ABSTAIN:

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Appendix "G"

Request for Re-Evaluation of Library Resource Notice of Board Determination of Appeal of Decision made on DATE Regarding TITLE, CATALOG NUMBER

RE: Notice of Library Board of Trustees' Determination upon Appeal

Dear NAME:

The board of trustees of NAME Library received your above-referenced appeal on DATE. On DATE, the Board met to consider your appeal.

In evaluating your request, the board applied the Library's Collection Management Policy, its Long-Range Plan of Service, and the Code of Ethics of the American Library Association.

Based on that criteria, the board has determined that [the Library Resource was properly included in the Library's collection] **OR** [the Library Resource was not properly included in the Library's collection, and will be removed/re-cataloged].

Thank you for entrusting the board of trustees with your concerns. The NAME Library strives to meet the needs of everyone in the community, and this requires careful attention to the needs of all, and the many factors governing selection of library materials.

Your understanding of, and input into, that process is appreciated.

Sincerely,

NAME
President,
NAME Library Board of Trustees