

ATHENS-CLARKE COUNTY LIBRARY HERITAGE ROOM COLLECTIONS MANAGEMENT POLICY

In support of the Athens Regional Library's mission to serve the community and region as a resource center by providing materials which satisfy informational needs, meet educational goals and promote the creative use of leisure time, the Heritage Room collects materials on the business, economic, social, cultural, and natural history, politics and government, geology, archaeology, and geography of the local area, Georgia and the South. The Heritage Room seeks to serve serious students of Georgia history, local history and genealogy of all ages, from the beginner to the experienced researcher.

To this end, the Heritage Room collects, preserves, organizes, and makes available on a limited basis these materials for the purpose of research and/or conservation. As a research area of the Library, the materials and resources should be used for the purpose of research and study.

GENERAL COLLECTION PRINCIPLES AND DEFINITIONS

Materials suitable for this collection must have relevance to Athens-Clarke County. It is recognized that materials are necessary that deal with Athens-Clarke County in the larger regional context including the State of Georgia and the South.

Because of the important role played by many Athenians in the War Between the States, a strong effort will be made to collect materials dealing with that period. Since Georgia also played a major role during the period of southern migration, materials about that period and phenomena will be added to this collection. Historically a large percentage of this area's population has been African American and materials relating to African American history, culture, geography, and economics are also collected.

The South is generally defined as those states which seceded from the Union in 1860-1861. Some materials are acquired on the "border" states i.e. Kentucky, Maryland and Missouri. Most emphasis will be given to acquisitions from the "core" Southern States: Alabama, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia. Materials for the states of Arkansas, Florida, Kentucky, Maryland, Missouri, and Texas are purchased less extensively.

Materials about other areas of the United States are purchased when they relate to the South. For instance, to cover the southern migration period, materials are collected for the Southern States as defined above and the Northeastern and Mid-Atlantic States.

ADVISORY COMMITTEE

The Heritage Room Librarian/Specialist may appoint an advisory committee of people to serve as a resource for networking in the community, accessing expertise in certain areas, helping to locate additional sources of possible donations, etc. The people on this Committee can include rare book dealers, archivists, genealogists, historians, photographers, antique dealers, estate salespersons, collectors, etc.

People nominated for this committee by the Heritage Room Librarian/Specialist should be approved by the Library Director of the Athens Clarke-County Library Board. Nominations will be accompanied by a summary of the person's expertise and a rationale from the Heritage Room Specialist as to why this particular person or their expertise is needed.

ACQUISITIONS

Materials will be collected through purchase, photocopy, gift or trade from individuals, businesses and institutions. The library reserves the right to refer or reject materials of questionable value to the collection. Various other exchange programs mutually beneficial to all institutions are pursued.

Every effort will be made to purchase materials as they are published/released as they are usually

less expensive and more easily acquired. Review media, basic lists of standard works, subject bibliographies, recommendations from members of the public or authorities in certain subject areas, and other sources are used by library staff in making decisions on the acquisition of individual items for the collection. Any of the following criteria may determine the inclusion or exclusion of an item:

- A. Authority and competence in presentation
- B. Permanent value
- C. Relationship of the item to the existing collection
- D. Physical characteristics of the item
- E. Relative importance in comparison with other works on the subject
- F. Current usefulness and public demand
- G. Price

The Heritage Room actively attempts to acquire local government publications of Athens-Clarke County and the City of Winterville and their departments.

Materials suitable for inclusion in the Heritage Room collection include these formats: books, letters, pamphlets, newspapers, periodicals, photographs and prints, negatives, other illustrative materials, oral histories, clippings, manuscripts, maps and measured drawings, aerial photographs, cassette tapes, videotapes, microforms, software and compact disks, works created to fulfill requirements for advanced degrees, and others deemed appropriate by the Heritage Room Librarian/Specialist.

Due to a lack of space, collections, memorabilia, and ephemera (unless of a relevant or unusual nature) will be purchased or accepted as donations on a limited basis. Exclusions for purchase: family histories, surname society publications, yearbooks for local schools, and colleges and universities statewide, local garden, civic, and study club yearbooks, minute books, financial ledgers, other records, papers, etc. from these local organizations.

DONATIONS

Donations (with the exception of those listed items below in the third paragraph) will be judged on the same basis as materials selected for purchase. The Heritage Room will accept gifts with the understanding that it may use them in accordance with its policies and dispose of them as it deems desirable.

Patrons wishing to deduct donations made to the library should have their item(s) or collections appraised before donating them. A completed Deed of Gift form must accompany all donations. This will specify restrictions, publishing and research rights. Donors will be informed that materials may not be sealed for more than fifty (50) years.

Items accepted as donations but not usually purchased include: family histories, surname society publications, yearbooks for local schools, colleges, and universities statewide, local garden, civic, and study club yearbooks, minute books, financial ledgers, other records, papers, etc.

Individual family bibles or bible records will be accepted and sent to the appropriate genealogical society for preservation and publication.

ITEMS PLACED IN CUSTODY OF HERITAGE ROOM

Materials that are not owned by the collection may be in the Heritage Room for research or other purposes. These items would be handled with a form called the "Deed of Deposit". For these items, the entity may let the Athens-Clarke County Library have physical possession of the items, on a temporary or on a permanent basis, but they may want to retain ownership and copyright. An example of these types of materials would be the Tax Digests of the City of Athens.

DE-ACCESSIONING/DISPOSAL

Since most materials in the Heritage Room are collected or accepted for permanent retention, the collection is generally not weeded. An effort is made to review materials discarded by other departments and branches that may be appropriate for possible transfer to the Heritage Room. Copies of materials that are duplicates or so mutilated that they are unusable will be discarded. Materials are replaced when they become shelf-worn, mutilated or scarce. Reprints of many books are available and in some cases microform or compact disk copies may be used as replacements.

At times, items may be offered to the Heritage Room that although of value and importance are not suitable for this collection. After clarifying with the potential donor that they will not be added but we would like to dispose of them to the Heritage Room's advantage the Advisory Committee will make a written proposal as to how to dispose of the item(s) to the best advantage of the Heritage Room. The donor will be given the option of reclaiming such items.

If a decision is made to remove (de-accession) something that the H.R. Advisory Committee deems to be of significant value from the collection, the Heritage Room Librarian/Specialist must obtain an appraisal from an outside source and determine the method of disposal (exchange, donation or sale). This should be approved by the Library Director upon the recommendation of the Heritage Room Advisory Committee in consultation with the Heritage Room Librarian. In either of the above situations, the funds thus generated would be used to purchase other items for the Heritage Room.

Issues to be considered when disposing of items include : private sale or public auction, will scholarly or cultural organizations be preferred recipients, what criteria was used to determine that item should be removed, is it too expensive to continue to keep in collection, do we offer back to donor if donor is still alive. These issues should be addressed by the Heritage Room Advisory Committee in its written proposal.

ACCESS

With essential security restrictions, the collection in the Heritage Room is available for serious students of Georgia history, local history and genealogy of all ages, from the beginner to the experienced researcher.

The Heritage Room staff welcomes and encourages research involving the materials in this collection while acknowledging the limitations of the collection and staff time. The Heritage Room's primary objective will be to provide material and resources on Georgia, local history and genealogy for patrons to research. An effort will be made to teach patrons to use the collection and to provide self-help materials for reference use. Information regarding courses, programs on the subject, and groups or individuals specializing in certain areas will be made available to patrons.

Written research questions via Internet, e-mail, fax, and U.S. Postal service will be answered by staff as time permits at the fees listed in the Fines/Fees schedule. No research questions received over the phone will be answered. Staff will be happy to fax or mail a form to people calling with research questions. (Research questions are more detailed and complex than reference questions and tend to take more than 10 minutes to research and answer via telephone.) If a patron who calls long distance cannot wait on the phone for the answer to a reference question, they should call back later to get the answer.

The vault in the Heritage Room is designed to hold rare, original, fragile and/or valuable materials. Items are stored in the vault at the discretion of the Heritage Room Librarian/Specialist or the Library Director. Access to the vault is by key and only regularly scheduled Heritage Room staff, the Heritage Room Librarian/Specialist, the Library Director, and the Administrative Assistant have access to the key or the vault.

When the UDC, DAR, Colonial Dames or other organizations bring in materials for storage, the materials must be accompanied by a complete descriptive inventory of all items with a description. Two originals should be prepared by the donor organization and after being checked thoroughly by both

Heritage Room Specialist and representative of the organization together, inventory should be signed and dated. Any additions should be handled in the same way. The conditions of all agreements of this type must be spelled out and signed and dated by both Heritage Room Specialist or Library Director and a designated representative of the organization. These organizations should arrange to do periodic checks of these inventories to make sure items are still there.

Members of these groups must call in advance and make arrangements to enter the vault when someone can be available to let them in. Everyone who enters the vault is to list the time in and out, purpose for entering, etc. in the use register for the vault.

A written request should be made in advance by researchers who want to use items from the vault. Written permission must be given by the Heritage Room Librarian/Specialist or the Library Director. Patrons using materials from the Heritage Room vault must fill out a registration form/card on their first visit each fiscal year and show a picture I.D.. They still must sign into the Heritage Room and show a picture I.D. upon request on subsequent visits. As a rule, only authorized staff will be allowed to enter the vault. Materials to be used will be brought out to the reading room to be used.

Fees for services are addressed in the Fines/Fees Schedule of the Athens Regional Library Policy Manual. **SEE FINES/FEES SCHEDULE.**

REPRODUCTION AND USE POLICY

Before material (print, manuscript, photographic, illustrative or other formats) from the collections of the Heritage Room may be quoted in print, or otherwise reproduced, in whole or in part, in any publication, permission must be obtained from 1) the owner of the physical property, and 2) the holder of the copyright. It is the responsibility of the researcher to obtain both sets of permission.

Researchers should maintain meticulous records of materials they examine while at the Library. The description of the item (example: broadsheet, dated 1890, Muster Roll of Company C, 44th Regiment, Georgia Volunteer Infantry, Army of Northern Virginia, C.S.A., Clarke County, Georgia, Johnson's Guards) All this data should be cited when requesting permission to reproduce or quote.

Requests for permission to quote or reproduce should be addressed to: Heritage Room Librarian, Athens-Clarke County Library, 2025 Baxter Street, Athens, GA 30606. Permission to publish or exhibit images will be from the Library Director. When requesting permission, please cite the title of the work in which the item will appear, the publisher, and expected date of publication or information concerning plans for exhibition. Permission is granted for one usage only. Additional uses will be considered upon application.

Permission to quote from manuscripts and written records owned by the Heritage Room is granted freely and non-exclusively. Reproduction of illustrative material normally requires the payment of a fee to the Heritage Room. These fees will be based on reproduction and handling costs including staff time and will be included in the Fines/Fees Schedules of the Athens-Clarke County Library Policy Manual. **SEE FINES/FEES SCHEDULE**

In the case of materials on loan, deposit, or that we have photocopies of, the Heritage Room will supply name and address of owner(s) who must be contacted for permission. Should the address of an owner prove not to be current, Heritage Room will require a legal form be signed by the researcher who wishes to proceed with publication without the owner's permission.

The Heritage Room, the Athens-Clarke County Library or the Athens Regional Library System are not responsible for any illegal or improper use of material from its collection or reproduction of same.

Reproductions may not be made for or donated to other collections, libraries, archives, museums, or other repositories by the applicant without prior written consent of the Library Director.

Under the Copyright Law of the United States (Title 17, as amended by PL 94-553), effective 1 January 1978, the copyright to any writing, whatever its date of creation, is held by its author or his heirs or designated agent(s) for a period of the author's lifetime plus fifty years unless the material passes(d) into the public domain. The creator, or his heirs, of any material not under statutory copyright on 1 January 1978 and not in the public domain on that date, automatically holds copyright until 31 December 2002, and longer in certain instances. For works published after March 1, 1989, no notice is required to establish copyright regardless of whether or not the work has been published. The researcher must make serious attempts to locate the holder of the copyright to both published and unpublished writings and illustrative materials to obtain permission for publication.

Copying of illustrative material or photographing of items in the Heritage Room collection by researchers using their own photographic equipment is not allowed. All illustrative material must be reproduced by the Library or a commercial studio using methods approved by the Library Director. Transfer of materials to and from a commercial studio will be done by the Heritage Room staff.

Fees charged for reproducing illustrative images or photographing items do not in any way constitute the sale of these images or the rights to them, but are charges for obtaining prints for use in lieu of the original prints or negatives. All rights are retained by the Heritage Room or the depositor.

If copy negatives are made in the reproduction process, all such negatives shall become the property of the Heritage Room of the Athens-Clarke County Library.

The Heritage Room expects that original source materials found in the collection will be credited to the Athens-Clarke County Library and original authors when used for publication. The following credit line will be used for the library:

Courtesy of The Heritage Room, Athens-Clarke County Library, Athens, Georgia

Photocopies of original documents/materials which are in the collection may be used for informational/research purposes; the owner of the original must be contacted for permission to publish and the source must be cited as dictated by U.S. Copyright Law.

Failure to abide by the above regulations, including the failure to give proper credit, is grounds for the permanent denial of access to material in the Heritage Room of the Athens-Clarke County Library.

EQUIPMENT USAGE

To provide library users maximum access to information, the Heritage Room makes available materials in a variety of formats accessible on machines. This includes microforms that can be read on microform reader/printers and computer access to the Internet and software programs. Usage on each machine is for one hour per person. Usage time may be extended if no others are waiting to use the machine.

For Computer Use Policies and specific Computer Use Procedures, see those sections of the Athens Regional Library Policy Manual.

Internet access is for the purpose of genealogical and/or historical research and abuse of the privilege may result in removal from the Heritage Room and possibly the Library. (See Internet Acceptable Use Policy in Athens Regional Library Policy Manual.)

CARE OF THE COLLECTION

An effort will be made to preserve materials in the condition in which they are received in a specially controlled environment. Heritage Room staff will clean and repair materials that are the property of the Athens-Clarke County Library in accordance with standard preservation procedures and will attempt to store in proper containers as funds become available for purchasing such containers. Conservation and restoration may be undertaken by experts on some items as funds become available for that purpose. To that end, a priority list of items needing attention and the prescribed treatment needed should be maintained

and updated annually. Photocopy and microfilm use will be urged in handling valuable originals.

Heritage Room books will bear the distinguishing mark "G".

LOANS

Materials will not be removed from the Heritage Room without the authorization of the Library Director or the Heritage Room Librarian/Specialist. As a general rule, only materials which the Heritage Room has duplicate copies of will be available for Interlibrary Loan. These may be loaned to other institutions with an "In Library Use Only" stipulation. When the physical condition of material permits, photocopies may be made. It is unlikely that materials donated to the Heritage Room for a particular collection ie. Phinizy Spalding Collection, will be loaned even in the instance of duplicate copies.

Special permission may be granted by the Heritage Room Specialist/Librarian or the Library Director for loan of Heritage Room materials to another institution for exhibition or other such purposes. Such permission would involve written agreements detailing responsibility for insurance, liability, transportation costs, length of loan, provenance, record keeping, monitoring, security, etc.

In most cases, fragile materials would not be loaned due to risk of further deterioration.

RECORDS

A Deed of Gift form will be filled out on each gift item added to the collection. Two originals on letterhead, including a complete description of the gift, will be filled out and mailed to the donor for signature(s). Both copies will be mailed back to the Heritage Room by the donor, signature of the Heritage Room Specialist or Library Director will be added and one original of the then complete form mailed back to the donor for their records.

A record will be kept of all items added to the collection and sent to Technical Services. A record will also be kept of materials donated to the Library, but which will not be added to the collection. These records track the donor, date donated, date the donor was thanked, date material was added to a collection in the Athens Regional Library System or date sold, donated, or traded to another collection.

When the UDC, DAR, Colonial Dames or other organizations bring in materials for storage, the materials must be accompanied by a complete inventory of all items with a description. Two originals should be prepared by the donor organization and after being checked thoroughly by both Heritage Room Specialist and representative of the organization together, inventory should be signed and dated. Any additions should be handled in the same way. The conditions of all agreements of this type must be spelled out and signed and dated by both Heritage Room Specialist or Library Director and a designated representative of the organization.

INVENTORIES

A spot check inventory of the vault will be done annually. At this time, materials will be evaluated as to condition, whether or not storage is appropriate, whether or not material is still appropriate to the collection, etc.

INSURANCE

Some items that are rare or difficult to replace may need to be insured. Appraisal should be done by donors at the time materials are donated to the Heritage Room. If the donors do not do an appraisal; some expert of whom the insurance company approves will need to make an appraisal.

There is also the possibility that some items may have increased in value due to the passage of time and may need to be reappraised. This can be looked at as part of the inventory process and the

Heritage Room Advisory Committee can recommend that appraisals be made on certain items in the collection.

SECURITY

All persons entering Heritage Room must sign the guest register upon entering. Only persons regularly assigned to the Heritage Room and approved by the Library Director and Heritage Room Specialist may have access to the vault and know the location of the vault key.

Scissors and other cutting tools may be loaned to patrons for use at the Heritage Room desk only, not to go back to their seats.

In an effort to provide security for materials in the Heritage Room, a separate security system that is sensitive to different stickers/tape will be at the doorway to the Heritage Room. Materials added to the Heritage Room collection will have a security sticker inserted/attached that is sensitive to this system. In the interests of conservation/preservation original, old, rare, fragile materials may be exempt from these security stickers.

If, during the annual inventory,(see INVENTORIES section) it appears that items are missing, a form will be used to declare each item missing, and a complete inventory and thorough search will be undertaken immediately. If items are determined to be in fact missing, the Athens-Clarke County Police will be notified immediately by either the Library Director or the Heritage Room Specialist.

ATHENS SHELF

A shelf (or shelves) in the Athens-Clarke County Library Heritage Room is to be designated as THE ATHENS SHELF.

All books on this shelf must have been written by authors who meet the following qualifications:

- A. Who were born in Athens-Clarke County, or
- B. Who lived in Athens-Clarke County for at least ten years, or
- C. Who wrote the book while living in Athens-Clarke County.

Books donated to the Athens Shelf are subject to the same collection development guidelines as all library materials.

Books published to fulfill the requirements for an advanced University degree are not eligible.

No public funds are to be used to acquire these books. They must be donated to the library by the author, friend, or relatives of the author or any other interested person.

Books of which only one copy is donated will not be available to be checked out, but may be used by patrons in the Heritage Room. In the event that multiple copies are donated, one copy will remain in the Heritage Room while other copies will be available for check out by patrons.

MATERIALS REVIEW POLICY AND PROCEDURES

Requests for review of materials currently in the Heritage Room are accepted. The review procedures are outlined in the Athens Regional Library Policy Manual.

10/13/98

INTERLIBRARY LOAN POLICY

Interlibrary Loan (ILL) services are available to Athens Regional Library System patrons who wish to obtain library materials which are not in the library's own collections or to loan materials found in the regional collections which are not available in other libraries. This service is offered subject to the guidelines, procedures and restrictions listed below:

1. All patron requests will be submitted on appropriate forms for processing providing as complete a bibliographic citation as possible. Requests from other libraries must either be received electronically or on an ALA interlibrary loan form.
2. Primary Network: There will be no charges for books available through the GOLD/SOLINET(Georgia On-Line Database Network/Southern Libraries Network). Overdue charges will apply. Fax and photocopying fees are the responsibility of the borrower.
3. Secondary Network: Lending/photocopy fees may be charged by non-SOLINET institutions. The patron must be willing to pay service, shipping and handling charges assessed by the lending institutions. Unless authorized by the patron, no requests will go beyond SOLINET.

Service Guidelines:

1. Materials may be requested from other libraries. Items missing from the Athens Regional Library System collection can be requested. Photocopies of missing pages can be requested. Items not suitable for ILL request/loan:
 - a. Reference books
 - b. New books (a new book has the current year copyright)
 - c. Audio-visual materials
 - d. Titles owned by ARL System which are in circulation or in a non-circulating collection such as Heritage Room.
 - e. High interest books(titles on which current movies/mini-series are based, GA Children's Book Award Nominees, etc.)
2. Patrons will be notified when materials are available or if we are not able to locate an item. Materials will be held until the due date and then returned to the lending library. The lending library will set the terms of the loan.
3. Borrowers are expected to return ILL materials by the date due. Failure to do so jeopardizes the borrowing status of the entire Library System. Delinquent borrowers will be charged an overdue fine (see Fines/Fees Schedule) and will be blocked from use of other library services until the materials are returned. Fines may be excused by library staff in individual cases; i.e., illness or death in the borrower's family.
4. The borrower assumes responsibility for all ILL charges and replacement or repair costs if materials are lost or damaged. All Library System services will be suspended for patrons who fail to pay ILL charges over the amount set on Fines/Fees Schedule. ILL privileges will be revoked for patrons who consistently fail to return books promptly.
5. Census microfilm and other special materials will require longer processing time. Fees as charged by the lending institutions will be applied including service fees, insurance, mailing, handling or photocopying charges. Unless permission is granted by the lending institution, all films must be used in the Library's Heritage Room.
6. All procedures for ILL as established by GOLD, SOLINET, and OCLC must be followed. These are

kept on file in the ILL office. Statistics will be kept in accordance with guidelines.

1/24/96