Printed Materials Collection Policy

Statement of Purpose

The printed materials collection policy serves the following purposes:

- To help determine which printed materials are essential to support the mission of the Ohio History Connection (OHC)
- To establish guidelines for OHC Archives/Library staff who are responsible for developing, preserving and maintaining those materials
- To provide a framework of procedures and guiding principles to assist staff in the selection, acquisition and disposal of printed materials
- To communicate the printed materials collection policy to the public, OHC staff and stakeholders

Statement of Responsibility

The Printed Materials Collection Policy is subject to the review and approval of the Director of Museum and Library Services. If deemed appropriate by the Director of Museum and Library Services, the policy may be submitted for review to the Executive Director of the Ohio History Connection and/or the Collections Committee of the Board of Trustees. Responsibility for the implementation of the policy rests with the Director of Museum and Library Services.

Initial responsibility for developing and implementing the policy is invested with the Printed Materials Committee. The Printed Materials Committee will consist of three voting members and a committee chairperson. The three voting members will be full-time, permanent OHC staff members appointed by the Director of Museum and Library Services. The Committee will be chaired by the manager of Cataloging and the Registrar’s Office.

Printed Materials Collection Scope

The printed materials collection at the Ohio History Connection supports the institution’s overall mission, which is “[to] spark discovery of Ohio's stories. Embrace the present, share the past and transform the future.”
The Ohio History Connection is tasked by the Ohio Revised Code with “[c]ollecting, preserving, and making available by all appropriate means and under approved safeguards all manuscript, print, or near-print library collections and all historical objects, specimens, and artifacts which pertain to the history of Ohio and its people [...]”. (ORC 149.30)

The printed materials collection includes materials originally printed and published in a two-dimensional format, such as books, pamphlets, serials, newsletters, newspapers, atlases, or maps. The printed materials collection may also include reproductions of these original materials on microfilm or in a digital format. The OHC Archives/Library may be limited in its ability to catalog and make available digital materials depending on their format.

OHC staff will preserve items in the printed materials collection as resources for current and future generations, recognizing that many of the formats used for printed materials will necessarily have a limited lifespan. Reasonable steps will be taken to preserve items from the collection and extend their lifespan when practical.

Items in the printed materials collection will be cataloged according to professional standards, and catalog records will be included in OHC’s online collections catalog. Items will also be made available to the general public in the Ohio History Connection’s Research Room during the Center’s open hours. Patrons are encouraged to consult OHC’s online collections catalog and/or Archives/Library staff to confirm the availability of specific items prior to visiting the Research Room.

The acquisition, management, deselection and disposal of the printed materials collection will be governed by the principles and guidelines described in this policy and overseen by the Printed Materials Committee.

**Printed Materials Collection Selection Criteria**

The primary focus of the printed materials collection is material about Ohio or Ohioans. Therefore, OHC staff will add materials to the collection that document and interpret the history of Ohio’s people, nature, places, institutions and endeavors, from pre-contact to the present.
Materials that support the understanding of other OHC collections also will be collected. Standard and important works in American history or biography and general reference materials may be collected as well. Published works about areas outside of Ohio will be collected more selectively. Priority is given to states surrounding Ohio. Indexed works are typically chosen over non-indexed works.

Whether purchased or donated, materials will be considered based on the following criteria:

- Alignment with the Ohio History Connection’s mission
- Relevance to the history and peoples of Ohio
- Relation to existing OHC collections
- Ability to bolster strengths or fill gaps in existing collections
- Availability at other libraries in the area
- Content and value of the work as a whole
- Representative viewpoints
- Interests and needs of patrons
- Suitability and quality of physical form
- Budgetary considerations
- Space requirements

This list of criteria is not exhaustive nor in priority order, and an item does not have to meet all of the criteria in order to be accepted into the printed materials collection.

As a leader for the state of Ohio in the collection and preservation of historical materials, the Ohio History Connection recognizes the importance of cooperation and collaboration with institutions that collect materials in similar or related fields. The OHC Archives/Library is committed to collecting materials in a manner that respects the collecting policies and practices of other institutions.

Considerations for Specific Collecting Areas

Newspapers

The Archives/Library collects historic and current Ohio newspapers. Newspapers are collected in hardcopy and microfilm formats. Newspaper photocopies,
clippings, and out-of-state newspapers are not accepted. In some instances, single issues of newspapers may be accepted to fill gaps or to add to our existing holdings.

**Local History and Genealogy Materials**

The Archives/Library collects printed materials that support genealogical research. The primary focus for genealogical collections is on materials with a strong connection to Ohio and its people, as well as materials that complement our archival collections.

Examples of materials collected include: family histories; directories and telephone books; vital record indexes; cemetery books; and county and local histories. Standard genealogy reference materials are also collected.

Due to limited resources and space, the newsletters of local genealogical and historical societies will only be collected if they include genealogical research or other material that would be useful to future researchers.

Privately published materials are reviewed on a case-by-case basis. Preference is given to materials that are properly bound, sensibly arranged, and include an index, citations, and/or table of contents.

Some unbound family history material, as well as privately published items that are not deemed appropriate for the printed materials collection, may be turned over to OHC Manuscripts staff for consideration for inclusion in the Family History Collection (MSS 922). (Please note: Newspaper clippings or photocopies, genealogical charts, family newsletters, hand-written notes, and photocopied materials are not collected by the Manuscripts department.)

**Serials**

Serials are publications issued in successive parts which are intended to be continued indefinitely. They typically feature numeric and/or chronological designations. Serials include newspapers, newsletters, directories, research journals, magazines, annuals, etc.
The Archives/Library collects serials that meet the criteria described in this policy. Duplicates will not be collected unless warranted by heavy usage of copies already in the collection.

**Government Documents and Publications**

The Ohio History Connection receives government documents and publications from the State Library of Ohio and other state agencies as required by the Ohio Revised Code. The Archives/Library maintains these items in the printed materials collection according to the requirements of the applicable sections of the Ohio Revised Code (see ORC 149.11, ORC 149.091, ORC 149.30).

Government documents and publications may be maintained in the printed materials collection beyond the minimum requirements of the Ohio Revised Code if they meet the general criteria described in this policy.

The Ohio History Connection printed materials collection is distinct from the State Archives, which is part of the Ohio History Connection and preserves the historical records of Ohio’s legislative, executive, and judicial branches. The Archives/Library collects printed materials, including government documents and publications, that directly support and enhance our understanding of the State Archives and other archival collections.

**Staff Reference Collections**

Departments and units within the Ohio History Connection may choose to maintain a reference collection for the use of their staff. All donated materials should first be offered to the printed materials collection before being added to any staff reference collections.

All aspects of managing staff reference collections will be the responsibility of the specific department or unit for whom the collection is intended. Staff reference items will not be included in OHC’s online collections catalog.

Staff are encouraged to contact the Archives/Library when disposing of staff reference materials to see if the unwanted items would be appropriate for the printed materials collection.
**Printed Materials Collection Deselection Criteria**

Deselection, the process of withdrawing materials from the collection, is necessary to maintain a useful collection and to make room for more relevant materials.

Items currently in the printed materials collection that do not support the Ohio History Connection’s mission or do not adhere to the guidelines described in this policy may be withdrawn in order to maintain a cohesive and orderly collection. The deselection process may also be applied to duplicate copies of materials; materials in poor condition; and superseded editions of reference materials.

Responsibility for the deselection of printed materials lies with the Printed Materials Committee. The Committee will compile a list of deselected materials and submit the list to the Collections Management Team for the purposes of review and documentation.

Printed materials that are withdrawn from the collection may be discarded; offered to other institutions; added to OHC staff reference collections; or sold to local book dealers. Money generated from the sale of deselected materials will only be used by the Ohio History Connection for the acquisition of new printed materials for the collection. No deselected materials will be given to individuals.

**Acquisition of Printed Materials by Donation**

Because limited resources make it difficult for the Archives/Library to acquire the range of materials necessary to meet all of the research needs of its patrons, donations of printed materials will be accepted.

The Archives/Library benefits from the generosity of its donors to help strengthen its printed materials collection. However, due to space constraints and limited resources, the Archives/Library is unable to accept all materials offered. Because the process of adding materials to the collection requires staff time and materials, the Archives/Library exercises great care in accepting donations into its collection.

*Donation Process*
Donors will be asked to provide the title, author, publication date, and condition when offering any items. This information will help staff determine the suitability of an item for our collection and reduce unnecessary shipping costs for both the donor and the Archives/Library.

Donors will be asked to complete a donation form for documentation purposes. If the form is not returned to the Archives/Library within 90 days of receipt of the materials, the items will be treated as an unconditional donation as stipulated by the Ohio Revised Code Sections 3385.01-10.

Items will be accepted into the printed materials collection based on the selection criteria described in this policy. Responsibility for the acceptance of donated items rests with the Reference Services manager or his/her designee. The Printed Materials Committee may be consulted as needed to help determine the suitability of items for the printed materials collection.

The following types of materials will not be accepted as donations at this time:

- Photocopies of original materials
- Yearbooks
- Single issues of newspapers (unless historically significant to Ohio)
- Materials that are dirty or in extreme disrepair
- Materials with mold or mildew damage

Any items that the Archives/Library does not accept will be handled according to the donor’s wishes as stated on the donation form. If the donor’s wishes are not specified on the donation form, the items will not be returned to the donor, and the Archives/Library will be free to make all decisions with respect to the disposition of the items in accordance with established policies and procedures.

Gifts of printed materials that are accepted by the Archives/Library become the absolute and unconditional property of the Ohio History Connection and cannot be returned to the donor for any reason. Once it takes possession of an item, the Archives/Library is free to make all decisions in accordance with its established policies and procedures with respect to the retention, storage, processing, use, and disposition of that item.
In accordance with applicable Ohio History Connection policies, donors are granted the same rights of access and use of materials that they have donated as other members of the public.

Donors are responsible for shipment or delivery of items to the Archives/Library except under extenuating circumstances. The Archives/Library may ask donors to send items for evaluation before they are accepted into the collection. The Archives/Library will pay return shipping fees for items that were requested for evaluation but are not accepted.

The Archives/Library reserves the right to refuse any gifts on which the owner has placed unusual restrictions. Examples of unacceptable restrictions include, but are not limited to, requiring items to be housed in a specific area apart from the rest of the printed materials collection, or requiring items to be stored out of their normal classification sequence.

The Archives/Library reserves the right to handle unsolicited materials in any manner it deems appropriate. Unsolicited materials are any items arriving without the donor having first contacted the Archives/Library. This includes complimentary items sent from authors or publishers. Unsolicited items may or may not be acknowledged. In some cases, a donor may be requested to complete a donation form.

**Tax Considerations**

All prospective donors are encouraged to consult with their legal, tax and/or financial advisers before making a gift to the Ohio History Connection. The tax deductibility of gifts can be a complex issue, and the Ohio History Connection, as the gift recipient, is prohibited by the IRS from advising potential donors with respect to such matters. The Ohio History Connection is not able to confirm the value of the property that has been donated.

Per IRS regulations, donations of items valued at over $5,000 for which donors intend to claim a tax deduction will need to be appraised by a “Qualified Appraiser.” The Ohio History Connection is unable to recommend a “Qualified Appraiser.” The Ohio History Connection does not pay for such appraisals and is not responsible for reviewing or authenticating the validity of such appraisals. All
appraisals should be completed before the donor transfers the property to the
Ohio History Connection.

Donors should refer to IRS Publication 561 “Determining the Value of Donated
Property” Visit http://www.irs.gov/pub/irs-pdf/p561.pdf to learn more about
what kinds of appraisals are accepted by the IRS for tax purposes.

In the event that the donor expects the Ohio History Connection
Archives/Library to sign any forms related to the tax-deductibility of a donation
of property (e.g., Form 8283), all such forms must be presented at the time of
donation. The Ohio History Connection Archives/Library cannot sign forms that
are presented after the time of donation.

The Archives/Library is not responsible for providing an inventory of donated
materials. If a donation is to be claimed for tax purposes, the donor must provide
for themselves and the Archives/Library a printed list of donated materials,
including at least the full title, author and year of publication of each item.

Acquisition of Printed Materials by Purchase

A limited acquisitions fund is available for the purchase of printed materials. Revenue
generated from the sale of withdrawn printed materials will be added to this fund.

The purchase of new items for the printed materials collection is managed by the
Printed Materials Committee. Staff members are encouraged to suggest printed
materials for purchase. The Printed Materials Committee will attempt to purchase the
items requested if they fit the criteria described in this policy and if sufficient funds are
available.

Regular Reporting

The Printed Materials Committee will submit a regular report of its work to the
Collections Management Team, including lists of newly acquired materials, deselections
and disposals. These reports will become part of the permanent record and will be
available in the records of the OHC Registrar’s Office.
Statement of Revision

The printed materials collection policy is a working document reflecting the current needs of Ohio History Connection Archives/Library users. The policy will be reviewed periodically and revised to reflect the changes in those needs.