



# LIBRARY OF MICHIGAN



## CREATING A LOCAL MATERIALS COLLECTION

Guidelines for Michigan Libraries

May 15, 2019



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# INTRODUCTION

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## WHY A LOCAL COLLECTION?

Every Michigan community has a unique story to tell. Developing and maintaining local collections ensure the story of a community and its residents are preserved for current and future generations.

- Local collections provide communities with a centralized source of community-relevant and authoritative information in a public and accessible environment.
- Collecting and showcasing local resources preserves the legacy and heritage of individual Michigan communities.
- Information found in local collections represent the people, experiences and memories of individual locales, contributing to the greater history and culture of Michigan.
- Local collections generate opportunities for libraries to expand programming, reach new audiences and form connections within their community.

The following guidelines provide a thought process to developing a local collection and should not be perceived as a step-by-step procedure. The information here is based on the Library of Michigan's experiences and outlook in developing multiple special collections, maintaining them long-term and being collaborative and creative in accomplishing goals when funding or resources are limited.

The Special Collections staff at LM are available to consult with libraries looking to develop, grow or refocus a local collection. Contact LM at 517-335-1477 or by email for more information.

Your feedback on this guide is also welcome, please let us know what you think, if you found useful information here or if we missed something. Thank you!

May 15, 2019

# GETTING STARTED

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The following guidelines are a general outline of considerations for those embarking on the development of a local materials collection or looking to refocus an existing collection. These are suggestions only; all measures might not work for every institution.

The Special Collections staff at LM are available to consult with libraries looking to develop, grow or refocus a local collection. Contact LM at 517-335-1477 or [librarian@michigan.gov](mailto:librarian@michigan.gov) for more information

## IDENTIFY COMMUNITY NEEDS AND EXISTING RESOURCES

- Determine your audience and their interest(s) in local information.
- Communicate with other entities and possible partners in the area, such as museums, local archives or other libraries with the objective to collaborate rather than compete for limited resources.
- Research and identify the sources of local materials unique to your community.
  - Local governments
  - Historical societies,
  - Genealogy societies
  - Community organizations,
  - Local business or professional groups,
  - Social clubs
  - Ethnic community organizations/groups
  - Friends groups

## DETERMINE THE SCOPE AND SERVICE LEVELS FOR THE COLLECTION

- Determine the focus and depth of the collection.
  - Define a geographical area your collection will represent.
  - Consider formats, available space and storage, timeframe the collection will encompass, etc.
- Establish the range of services associated with the collection, either onsite or remote, and whether you will charge any fees, i.e. scanning, copying, etc.



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## DEVELOPING THE COLLECTION

- Create a collection development policy and acquisition procedures for your local collection.
  - Include a defined geographical area, types of materials desired, acceptable formats, etc.
  - Determine what you will not collect, whether due to content, format, or other existing sources in the community.
  - Set retention periods and weeding guidelines as well as disposal practices for incoming materials.
  - Establish protocols for communicating with information creators (publishers) and donors to insure systematic and regular receipt of new materials.
  - Consider creating cooperative collection agreements with area partners so as not to duplicate effort, while still maintaining access to the material.
  - Create a formal acceptance policy (with forms and letters) to share with donors, spelling out ownership, right of disposal and use or copyright limitations (if applicable).
- Assess and weed your current collection per the new or updated collection development policy.
  - Look for other local or in-state cultural institutions that may be interested in the items that no longer fit your new collection development policy.
  - The Library of Michigan takes a broad approach to collecting all things Michigan and would be happy to accept material donations. Contact LM at 517-335-1477 or [librarian@michigan.gov](mailto:librarian@michigan.gov) for more information.



## COLLECTION LOCATION, ACCESS AND PRESERVATION

- If desired and practical, separate materials from the general collections and create an identifiable location for local materials.
- Get creative when deciding how to house and provide access to awkward or challenging formats, ephemera and random paper memorabilia, i.e. collections of newspaper clippings, fragments or excerpts of larger works, handbills, flyers, invitations, announcements, etc.
- For collections that will contain fragile or at-risk materials, plan for environmental controls, tools and supplies for conservation and preservation.
- Maintain staff to collect, process, and provide reference service to the materials.

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- Establish and publish use guidelines.
- Determine open hours, security procedures, materials handling limitations, duplication and copyright restrictions.
- Consider creating a separate online presence dedicated to information about the local collection and providing access to electronic or digitized materials.



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## PROMOTING THE COLLECTION

- Create a plan to promote your collection and its use. Use promotion to garner donations, both financial and material.
- Consider promotion from multiple angles, and layer simple, passive methods with higher impact and more active activities as resources permit.
  - Internal: Consider ways to draw attention to the collection and make it a 'destination' in your library through naming, signage, descriptive handouts, visual displays and in-library events.
  - External: Take your collection 'on the road' in person with presentations to community groups and through the library's online media outlets. Use visual elements from the collection to create promotional giveaways, or to sell to support the collection.
- Always consider partnering with other organizations or members of the community that may have collections or resources that could support or enhance your promotional activities.
- Always include promotional activities in budget planning.





# ADDITIONAL CONSIDERATIONS

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## FUNDING AND RESOURCES

- Include planning for financial and staff resources in all aspects of developing and maintaining a local collection.
- Consider the need for staff time, supplies, equipment, storage and promotional activities.
- Get creative in locating funding and resources, recruit volunteers and sponsors or benefactors and form partnerships with other organizations or businesses that could contribute to developing and maintaining the collection.

## POTENTIAL PITFALLS

- Over-committing the library's resources.
- Incorrectly identifying your audience and their needs, potentially making the collection irrelevant or not useful.
- Underestimating the burden of incoming donations.
- Be wary of situations where assistance, support or donations come with strings or dictates that conflict with established library policies.

## WE CAN HELP!

- The Library of Michigan is committed to helping you develop and maintain a local collection that reflects your community's interests and heritage, supports your service population and fits within the resources available to your library. For a consultation with LM staff or any questions about this guide, please contact us at 517-335-1477 or [librarian@michigan.gov](mailto:librarian@michigan.gov).



# DOCUMENTING YOUR LOCAL COLLECTION

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## A COMMONSENSE APPROACH TO DRAFTING POLICIES AND PROCEDURES

Clear and functional documentation is a vital part of developing and maintaining a local collection that is not only relevant to your users but remains dynamic through the years to come. Straightforward policies that reflect your institutional missions and goals will provide a foundation for procedures and guidance to manage the collection on a day to day basis and plan for future development. These documents also provide a basis for the development of consistent and standard communications (i.e. letters, forms, templates, etc.) between library staff and users, donors and sponsors.

When drafting policies, procedures and letters or forms, consider the following guidance;

- Be aware of any legal requirements and/or processes dictated by your library board or other authority related to establishing new or different policies, procedures or communications with users.
- Strike a balance - include enough detail to make the documents useful, but not so much that putting them into practice becomes burdensome or counterproductive.
- Test your policies, procedures and outgoing standard communication on staff and /or other library associates to insure erroneous information or improper procedure is corrected before a letter or form is put into use.
- Regular review of policies and procedures is recommended to assure they remain in line with current library practice and existing resources.

## POLICIES

Policies are a starting place for defining the 'what' relevant to your local collection. Draft policies that express your institution's intentions in building and providing access to a local collection, keeping in mind your library mission, audience and resources.

There are many online sources of sample and real-life library policies. Diligent searching might find you a policy that only needs a little tweaking to become a perfect fit, but it is more likely that you will need to develop your own. These links provide a starting point for developing a variety of library policies.

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- [Library Policy Development General \(ALA\)](#)
  - [WebJunction : the learning place for libraries \(Policies\)](#)
  - [Library of Michigan – Library Policies](#)

## PROCEDURES

If policies are the ‘what’, procedures are the ‘how’. Procedures are the working documents that set standards and processes for the work you do to develop and maintain your local collection. If you have existing or current practices related to acquisitions, processing, cataloging and conservation/preservation, consider adding in or editing to incorporate materials handling for your local collection. If necessary, draft new procedures to maintain consistency and incorporate your local collection into your mainstream processes.

Unlike policies, it is not likely that your local collection procedures will be made public, but the documents should still be clear, logical, concise and professionally written. Procedures are the place for details, but not necessarily minutia. Using internal and common acronyms and library vernacular is acceptable in these documents within limits – remember that you may be using volunteers or interns with limited library experience to perform some of the work described in your procedures. Drafting procedures is also an excellent way to identify, compile and transfer legacy knowledge about your institution and collections from veteran members of staff and long-time volunteers to new(er) employees and volunteers.

## TEMPLATES AND FORMS

The third level of documentation you will want to develop for your local collection are communiques that you will use to interact with the collection users and contributors. Some examples are;

Donation form and guide – a template that allows you to record the name or the donor, date of the transaction, a description of the materials donated and donor signature as well as statements indicating any requirements or limitations involved in donating to the collection per your donation policy.

Thank you letters – acknowledging the donation, maintaining the bond between donor and your institution

User request forms – depending on how your local collection is housed, a user may need to request the materials be pulled from a closed area. Potentially a simple form with space for title, author, call number and any requirements for how the material can be used.

Photocopy, photography or digital reproduction form – establishes allowable duplication activities and available services. May include statements on use and re-use limitations (i.e. copyright).

## HELP!

As with any other segment within this guide, the staff of the Library of Michigan is ready to discuss, review or comment on draft documents. Contact us at [librarian@michigan.gov](mailto:librarian@michigan.gov) or 517-335-1477 for assistance.