

IU KOKOMO LIBRARY GIFT POLICY

PHILOSOPHY, POLICY, AND PROCEDURES GOVERNING THE ACCEPTANCE AND PROCESSING OF IN-KIND GIFTS

Gifts enable the IU Kokomo Library [subsequently known as Library] to broaden and enrich its holdings. The acceptance of gifts also strengthens the relationship between the library and its communities and provides a way by which a donor can share his or her intellectual interests with future generations.

The written collection development philosophy and policies of the Library, and library procedures found in this document govern the acceptance and stewardship of gifts in order to assure that the interests of both the Library and the donor are served. This document does not apply to acceptance of materials to be housed in the IU Kokomo Archives.

- 1) It is the **PHILOSOPHY** of the IU Kokomo Library that collections should be developed according to the mission statements of Indiana University Kokomo and the Library. The Library will develop its resources to support the work of its users, including faculty, students, staff, and the wider community of North Central Indiana. Specific collection interests vary from time to time, but in general, the Library's collections relate to:
 1. Those fields of research and study offered at IU Kokomo
 2. Materials of particular interest to the Kokomo geographic area
- 2) It is the **POLICY** of the Library to only accept gifts from donors when such acceptance furthers the mission of the Library and when the intent of the donor can be reasonably and legally accommodated without undue stress upon the Library's resources, systems, and staff. The Library will not accept gifts for which it cannot provide appropriate stewardship.
- 3) The following **PROCEDURES** seek to normalize the handling of incoming gift material.

Conditions of Acceptance

The Library welcomes gifts of materials that enhance the strength of its collections and support the instructional and research programs of the University. The Library will ask to review gifts prior to acceptance and reserves the right to decline an offer of material that is already held in the collections, that does not meet collection needs, or which the Library cannot steward appropriately. *In order to facilitate the library's review, a bibliographic list will be requested of prospective donors prior to receipt in library of any materials.* This bibliographic list must include for each item the title, author, copyright date, publisher, edition statement, and finally, a note of poor, good, or excellent physical shape. If appropriate the list should also indicate format if anything other than print material. The list should also include the donor's name, address, and preferred method of contact. When a gift is declined, library personnel may suggest other libraries or institutions better suited for the donation.

Gifts are accepted with the understanding that they become the property of Indiana University, and that the Library will make all necessary decisions as to their retention, location, cataloging, and other considerations related to their use and disposition. Special terms or conditions requested by the donor should be discussed with the Dean of the Library and the Technical Services Librarian before the gift is accepted. Once a gift is transferred to the Library, no part of it will be returned. It is the responsibility of the Technical Services Librarian to review offers and donations to make selection decisions based on the collection development philosophies and policies of the library and of the subject area involved.

Outdated textbooks, superseded editions, duplicate copies, material in foreign languages other than those taught at IU Kokomo, items in poor physical condition, outdated material formats, and periodicals are not appropriate for addition to the collection and will not be accepted as donations. Any materials accepted and subsequently deemed unsuitable will be disposed of at the library's discretion.

Sources of Gifts

UNSOLICITED GIFTS

Unsolicited gifts are unexpected donations of materials. Unsolicited gifts will not be accepted by the library, nor will they be acknowledged or returned. A donor of unsolicited materials may instead provide a bibliographic list of materials, as described previously, at which time a decision will be made by the Technical Services Librarian regarding acceptance of the gift materials.

SOLICITED GIFTS and COLLECTIONS OF NOTE

Solicited gifts will be identified and sought after by Library representatives. The donor may be someone who has contacted a library faculty about a donation or the development office about a planned gift. Arrangements for acceptance of solicited gifts will be made between the Dean of the Library and the donor. The procedures for the actual transaction will be determined by the Dean of the Library.

SELECTED GIFTS

Selected gifts are items selected by library faculty from lists circulated by individuals or organizations. Library faculty will not accept these type of gifts without the approval of the Dean of the Library and/or the Technical Services Librarian. Once approved these gifts are received directly by the librarian who initiated the gift.

Procedures for Receiving Selected Gifts

Any library faculty receiving a gift on behalf of the Library should submit a document detailing the gift to the Dean of the Library within one week of receipt of the gift. This confidential document conveys appropriate information to the Dean so that, first, an acknowledgement letter can be sent; second, that the gift will be recorded in the gift records of the Indiana University Foundation; and, third, that appropriate stewardship actions can be taken. The above mentioned document will include the donor's name, address, number of items donated, and the date of the gift. Any correspondence received with the gift should be forwarded to the Dean's office along with the completed document.

If materials are received directly by anyone other than the Technical Services Librarian, the materials received must be reviewed by the Technical Services Librarian prior to a request for cataloging.

Procedures for Receiving Solicited Gifts or Collections of Note

Acceptance of specific special collections and agreements between donors and the Library require additional procedures. The Technical Services Librarian should review the proposed donation by examining it at the donor's point of keeping or by examining a bibliographic list that (ideally) includes condition statements about the items.

In order to give donors the most current information and to be in compliance with the pertinent IU Kokomo, Indiana University Foundation, Internal Revenue Service, and State of Indiana regulations, the Dean of the Library should contact the Development Office before discussing tax deductions, gift valuation, gift appraisals, and shipping costs with a prospective donor.

Valuation of library-owned material or material under consideration for acceptance as a gift by the Library, whether by staff or paid or unpaid representatives, is considered a conflict of interest. *No references to price or value may be included in any correspondence or acknowledgement letter.*

Gifts with an assumed or appraised value of over \$1,000 or consisting of more than 100 volumes must be approved by the Dean of the Library before acceptance.

Acknowledgement and Record-keeping

Every effort will be made to send an acknowledgement letter to the donor within two weeks of receipt of the gift for solicited or selected gifts. This acknowledgement will be sent by the office of the Dean of the Library and/or the Office of Development. Acknowledgement of items retained from unsolicited gifts for the Library collections will be sent in January following the year of donation. (i.e. gifts received from Jan-Dec 2013 will be acknowledged in Jan 2014). This information will be gathered and maintained by the Technical Services Assistant, who will provide the information to the Library Secretary to create the actual letter. The information included for unsolicited gifts include donor name and address as well as number and format of gifted materials. (i.e. 10 hardbacks; 3 paperbacks; 2 DVDs)