

**Boston Athenæum  
Collection Development Policy for  
Circulating and Open Shelf Materials  
2016-2017**

**I. Introduction**

In 2016, a committee was formed to undertake a revision of the collection development policy first written in 2004 and due for its regularly scheduled review. Its mandate was to align the document with a broader institutional operational plan initiated in 2015.

“The Collection Development Policy for Circulating and Open Shelf Materials” (the Policy) was renamed, revised, and updated by the following staff members: Mary Warnement (Head of Reader Services), Will Evans (Chief Librarian in Charge of Technical Services), Dani Crickman (Children's and Young Adult Services Librarian), Tom Gearty (Serials Librarian), Carolle Morini (Archivist and Reference Librarian), Kaelin Rasmussen (Rare Materials Catalog Librarian), Anthea Reilly (Acquisitions Librarian), and Graham Skinner (Rare Materials Catalog Librarian). Judith Maas (Cataloging Assistant) served as editor.

The group met on March 15, 2016, to evaluate the policy and to discuss how to make its contents more accessible to a general readership. Will Evans took the lead on rewriting the collecting level definitions and replacing numerical with descriptive assignments. He shared his efforts by email with the group, which met again on May 2, 2016, when Mary Warnement agreed to write a brief history of the circulating collection and to act as coordinator for the revision of the other sections of the Policy. Drafts were exchanged throughout September and October and then edited in November. A sub-committee met on October 31, 2016, to assess electronic resource subscriptions, which are also selected by criteria outlined in this Policy.

The committee submitted a draft to the director on November 28, 2016, and discussed her reaction on January 18, 2017. The committee met again on January 25, 2017, to incorporate revisions. On February 3, 2017, the Library & Member Services Committee approved sections I-III and V-VI of the document and on October 24, 2017, approved section IV.

Below is (II) a brief history of the circulating collection, (III) an outline of the current scope of the collection and the guidelines that govern its acquisition, (IV) the future scope of the collection, (V) Procedures, and (VI) Policies.

**II. A Brief History of the Athenæum's Circulating Collection**

At the time of its founding in 1807, the Athenæum's collecting scope could be summarized simply: the best of everything. The first catalogue in 1810 reflects a universal approach to collecting. By 1827, when books were allowed to circulate, the Athenæum had realized more was being published than could be reasonably collected and initiated a process of contraction. Certain collections (including the subjects medicine, law, and theology, to name three significant examples) were de-accessioned and donated to other local and regional institutions. That process of refinement continued so that by the beginning of the twentieth century, the Athenæum had evolved into a Humanities collection: art and architecture, biography, book arts and bibliography, general interest, history, and literary fiction, the largest and most popular collection at the Athenæum. Former subjects were not always de-accessioned but sometimes simply not augmented. Proprietorships have always been family memberships, and by the late nineteenth century, the Athenæum affirmed its commitment to developing a select collection of children's literature. The circulating collection complements and supports study of Special Collections; over time, many books originally purchased for circulation become rare; therefore, staff regularly assess the circulating collection for rarity and value and transfer items to Special Collections when appropriate.

**III. Current Scope of the Circulating and Open Shelf Collection**

The committee at first decided to revise the Policy without being format-specific, that is, so that the content of an item for the collection would take precedence over its format; however, the committee ultimately decided to take a stance and affirm a commitment to the Athenæum's collecting strength.

While the Athenæum has occasionally experimented with other formats, its core collection consists of print books.

In the case of reference materials and serials, electronic access has proven an effective format for some essential materials. Databases of traditional print journals are easier to use than annual indices. Also, reference works that are online offer enhanced searching, cross-referencing, and linking as well as being easier to use and therefore promoting increased accessibility.

Like any library, the Athenæum cannot collect everything and therefore participates in interlibrary loan in order to secure materials in subjects and formats beyond its collecting scope for its membership. Lending materials to other institutions helps fulfill the Athenæum's scholarly mission to serve the broader research community.

The subjects and collection levels also conform to the guidelines enumerated in the policy document, "Special Collections Management at the Boston Athenæum."

### **General Guidelines**

The guidelines listed immediately below apply to the selection of all circulating and open shelf materials in the library: monographs, reference works, and serials in all formats. More detailed guidelines, arranged by subject, appear later in this document, after we define collection levels. It is the responsibility of the Acquisitions Librarian to ensure that each subject category achieves relevancy and currency and that there is balance between general interest and scholarly books. Subject Bibliographers (see section V) consider the following factors when selecting materials:

- Is the material appropriate for the collections of the Boston Athenæum?
- Does the material fill an identified need within the collection?
- Is the cost of the material justified?
- Will the material be of lasting value?
- Does the material have literary merit, a reputable author and/or publisher, or other criteria that would justify purchase?
- Is the format appropriate for the Library?

### **Definitions of Collection Levels**

**Research:** An extensive collection, in which the Athenæum endeavors, so far as is reasonably possible, to include all significant works on a clearly defined subject. This collecting level is almost exclusively reserved for materials that support the Athenæum's Special Collections. It encompasses the collected works of the most important writers in the field, a wide range of current and retrospective monographs and scholarly journals, and an in-depth selection of reference tools and bibliographies. Older material is retained for historical research.

**Study:** An appreciable collection that supports sustained independent study of less than research intensity. These collections include a generous selection of current and retrospective monographs, scholarly journals, and the most significant reference tools and bibliographies. A judicious selection of older material is retained for historical research.

**Introductory:** A highly selective collection, which serves to introduce and define a subject and to indicate the varieties of information available elsewhere. It includes a limited selection of current and retrospective monographs, scholarly journals, and a sampling of reference tools.

**Browsing:** Reserved for subject areas deemed peripheral to the collecting interests of the Athenæum, in which few selections are made beyond very basic works.

**Out of Scope:** The Athenæum does not generally select the following types of material:

- Materials outside the collecting level for a given subject, as outlined below
- Textbooks, technical manuals, how-to books, dissertations, and self-help books

- True crime, horror fiction, evangelical inspirational fiction, and romance novels, unless selected for their literary merit
- Paperbacks when hardcovers exist
- Duplicate copies, unless the book is in high demand
- Non-English-language books, unless the subject is highly pertinent to the collection, part of a standing order, or unavailable in English
- Outdated reference material
- Movies and sound recordings
- Materials in obsolete formats, such as microform

## **Monographic Collection**

### **Art and Architecture**

The Athenæum's extensive collection of art books mainly encompasses Western art and architecture from the fifteenth century to the present. American art and architecture is the central focus but books on British and European art are also widely collected with emphasis given to artists and architects whose work was or is highly influential in the United States. The emphasis on American art reflects the strengths of the Athenæum's prints, photographs, and fine art collections. General works on non-Western art are considered, but as representational rather than comprehensive. A conservative approach is exercised in selecting books on private collections and the holdings of individual museums, restricting these purchases to major well-known collections and museums.

**Purpose:** To provide a circulating collection for the membership. To support the research needs of the staff

**User Profile:** The majority of the members using the collection are museumgoers and art enthusiasts. A smaller number of art collectors, practicing artists and architects, and undergraduate and graduate students also use the collection

**Languages:** Primarily English. Foreign language texts are purchased when there is no available English text and when the subject is highly important to the collection

**Collection Level:** Research for American art and architecture; Study for British/European art and architecture; all others Browsing

**Chronological Periods:** Fifteenth century to the present

**Geographical Areas:** Emphasis on local, regional, and national art and architecture  
Secondary emphasis on British/European art and architecture

### **Biography**

The Athenæum's collection of biographies, autobiographies, and diaries (particularly those relating to American or British figures) is one of the best developed in the Library. It functions both as a complement to our historical holdings and as a distinct collection. Biographies are acquired comprehensively, with a particular emphasis on New England and other major American subjects and on British and other European subjects whose lives might broaden the scope of a related subject area or be of special interest to our readers.

**Purpose:** To provide a circulating collection for the membership. To support the research needs of the staff and scholars

**User Profile:** Users range from the general reader to the research scholar

**Languages:** Primarily English. Foreign language texts are purchased when there is no available English text and when the subject is highly important to the collection

**Collection Level:** Study

**Chronological Periods:** Primarily from the eighteenth century to the present

**Geographical Areas:** Emphasis on local, regional, and national subjects and on British and other European subjects

**Out of Scope:** Celebrity biographies

### **Book Arts and Bibliography**

The collection is extensive and contains historical and contemporary material on book design and designers, printing processes, history of the book, the book trade in Europe and America, bookbinding

history, bookbinding techniques, book conservation, bookplates, bibliographical societies, libraries, and catalogues of important collections.

**Purpose:** To provide a circulating collection for the membership. To support the research needs of librarians, the curatorial staff, and scholars

**User Profile:** Users range from the general reader, to the collector, to the highly specialized researcher. The circulating collection satisfies most members' needs but complements extensive holdings in special collections

**Languages:** Primarily English. Foreign language texts are purchased when there is no available English text and when the subject is highly important to the collection

**Collection Level:** Research

**Chronological Periods:** All periods

**Geographical Areas:** Emphasis on American, British, and other European subjects

### **Children's and Young Adult**

The Children's Library collection serves primarily as a recreational reading library for children and teens. Current acquisitions build on a significant body of children's classics. An emphasis on literary quality and artistic expression is nuanced by a commitment to working toward diverse, equitable representation within the collection, with priority given to works by people of historically and currently marginalized groups. Books are primarily by American authors, with a sizable secondary selection by British authors, and with an eye for the best global English-language books and foreign-language books available in translation. Fiction encompasses board books, picture books, beginning readers, transitional chapter books, middle grade and young adult novels, and graphica. There is also a quality selection of nonfiction picture books and monographs for children and teens, children's periodicals, and basic ready reference materials—encyclopedias, dictionaries, and atlases.

**Purpose:** To provide a circulating collection for family members

**User Profile:** Children and young adults from infancy up to age eighteen, parents and caregivers selecting books for children, and adults interested in children's and young adult literature for leisure reading. A significant number of people attending programs are multilingual

**Languages:** Primarily English. Some titles in Spanish, French, and German are purchased to accommodate an increase in multilingual users

**Collection Level:** Introductory

**Chronological Periods:** Nineteenth century to the present

**Geographical Areas:** Multicultural. In nonfiction, emphasis is on local and national history and biography, with secondary emphasis on world history

### **Fiction and Literature**

The Athenæum's literary fiction collection, including an extensive mystery collection and nineteenth-century novel collection, might be classified as strong simply because of its quantity. It is the area of most consistent reader demand. Because of the tremendous volume of fiction being published, certain standards of quality are assessed before acquisition. The Athenæum attempts to add to the collections of authors whose works were purchased regularly in the past. Important debut novels and key publishers as well as books receiving literary prizes are considered. The following are considered for purchase: the best fiction in translation; critical studies of authors and literary periods when the scope of the study is not too specialized; as well as essays, poetry, and dramatic works. An extensive collection of bibliographies, biographical dictionaries, and journals supports the fiction and literature collection.

**Purpose:** To provide a circulating collection for the membership and scholars

**User Profile:** Users range from general readers to writers and scholars

**Languages:** English. A collection of older works in French, German, and Italian are held primarily in off-site storage

**Collection Level:** Research

**Chronological Periods:** Eighteenth century to the present

**Geographical Areas:** Emphasis on American and British writers with occasional translations of foreign writers. The Library no longer collects fiction in foreign languages but looks for the best foreign fiction in translation.

**Out of Scope:**

- Horror Fiction

- Romance Fiction

### **General Interest**

The Athenæum collects some books of general interest for its members. Subjects include philosophy, religion, cooking, travel, popular science and technology, economics, law, medicine, military science, and sports. These are representative rather than comprehensive.

**Purpose:** To provide a circulating collection for the membership

**User Profile:** Readers seeking an introductory treatment of these subjects

**Languages:** English

**Collection Level:** Browsing to Study

**Chronological Periods:** All periods

**Geographical Areas:** Emphasis on American, English, and European subject matter

**Out of Scope:**

- Evangelical inspirational books
- How-to books
- Self-help books
- Technical manuals
- Textbooks

### **United States History and American Studies**

In the nineteenth-century, the Athenæum collected comprehensively in this area. Since World War II the Library has gradually focused on areas where the circulating and special collections are strongest: Boston history, New England history, nineteenth-century U.S. history, and the Civil War period particularly. Materials purchased consist of scholarly texts supporting serious research and study as well as popular works for reading at home.

**Purpose:** To provide a circulating collection for the membership. To support the research needs of staff and scholars

**User Profile:** Users range from general readers to professional scholars

**Languages:** English

**Collection Levels:**

Voyages of Discovery: Study

Colonial Period: Research

American Revolution and Early Republic: Research

Western Travels and Exploration: Research

Slavery and the Abolition Movement: Research

Civil War and Reconstruction: Research

Gilded Age to World War I: Research

20th Century: Study

### **World History and Civilization**

During the nineteenth-century, the Athenæum did a remarkable job of keeping this collection current and comprehensive, especially in the areas of Greek and Roman history and archaeology and European history. In the last century there was a strong emphasis on English history and biography. The collection, as a whole, does not focus on Asian, African, and Latin American history.

**Purpose:** To provide a circulating collection for the membership

**User Profile:** Materials purchased consist of popular works for reading at home. Users range from general readers to professional scholars

**Languages:** English

**Collection Levels:**

Ancient History and Archaeology: Study

European History: Study

Canada: Study

Asian Studies: Introductory

Near East and North Africa: Introductory

Latin America: Introductory

Sub-Saharan Africa: Browsing

Oceania: Browsing

### **Reference and Research Tools**

To enable the librarians to answer “ready reference” inquiries and permit readers to conduct in-depth research using the collections, the library maintains a reference collection including both the standard titles (encyclopedias, dictionaries, biographical dictionaries, bibliographies, etc.) found in most libraries and specialized sources relating to the principal Athenæum history and collections — in New England state and local history, U.S. history (particularly the Civil War period), U.S. travel and exploration, art history, library history, and certain other areas in the humanities and social sciences. The collection includes traditional print volumes as well as electronic resources selected by the librarians to complement the Athenæum’s collections.

**Purpose:** To support the reference and research needs of members and staff

**User Profile:** Staff and members whose interest ranges from amateur to professional

**Languages:** English. Foreign language texts are purchased when there is no available English text and when the subject is highly important to the collection; for example, dictionaries of foreign languages, national biographical dictionaries, and subject bibliographies

**Collection Level:** Study to Research

### **Serials Collection**

Serials are selected to complement the monographs, reference works, and Special Collections of the Boston Athenæum.

A serial is defined as a publication issued in successive parts over a period of time, intended to be published indefinitely. Examples include periodicals, journals, and newspapers. In addition to these publications, Athenæum serials subscriptions encompass memberships, “standing orders” (usually titles published annually or less often), and even monographic sets if published over a period of time. Serials may also appear in electronic format. Caveat: electronic access may be limited for back issues and also may no longer be available once a license is not renewed.

The Library must maintain the subscription after the original purchase and must add the expense of binding completed volumes for those titles that are selected for inclusion in the holdings beyond the current issues; a binding policy determines what titles are held and for how long. (e.g., six months, two years, or bound and added permanently to the collection). Therefore, adding a new serial title requires careful consideration. Due to the nature of contracts with publishers and vendors for most subscriptions, titles are usually locked in for a year without cancellation options. The price of many serials escalates every year, increasing the need to be judicious when adding new orders.

The Serials Librarian provides a generalist’s perspective and oversees the selection, budget, and maintenance of the serials collection. Subject Bibliographers (see Section V) as well as staff members with subject expertise, general knowledge of the collections, and knowledge of members’ interests participate in the selection and binding decisions. Members are also encouraged to submit serial titles for consideration.

An overall review of the current subscription list and standing orders should be performed at least every seven years to determine if the titles selected are still the best for the library’s needs, at which time the binding policy should also be reviewed.

**Purpose:** To support the reference and research needs of members and staff

**User Profile:** Staff and members whose interest ranges from amateur to professional

**Languages:** Primarily English. Foreign language texts of serials are purchased when there is no available English text and when the subject is highly important to the collection. Current newspapers in French and German are offered in response to demand

**Collection Level:** Reflects monographic collection levels for subjects in monographic and reference collections

#### **IV. Future Scope of the Collection**

As the Athenæum considers its place in the cultural landscape of twenty-first century Boston, it wrestles with the future of the book in a digital age. The committee brainstormed uncertainties related to the circulating collection and open shelf materials, and addressing these uncertainties will require staff knowledge of the collection, member input, and creative thinking about the future of the collection. Any resulting goals will necessarily be shaped by budget and space realities as well as informed by changing trends, evolving demographics, and emerging technologies.

When considering this digital age, we often refer to “transition.” Yet the reality is an “overlap.” For example, the cost of electronic resources as well as the fact that—contrary to popular belief—not everything is available online creates new challenges for what used to be the simple daily delivery of a newspaper on a front step. The business model for online newspapers is for individual, not institutional, users. One vendor went out of business and stopped delivering *The Washington Post* (whose desirability has increased in the current political situation), which means the Athenæum receives it by mail, up to a week after its publication date—hardly breaking news. In another example, there is a national shift to listening to e-audiobooks. A small number of vendors offer titles from multiple publishers while many publishers wish to contract their own. Pricing in this situation is wildly diverse and frequently prohibitively costly.

The digital realm has not yet addressed the library model, established in law under the “first sale doctrine.” Until the publishing and legal world address the circumstances for institutions rather than individuals, libraries must work with what is available and attempt to influence what becomes available. In order to position itself as best it can in this ever-changing environment, the Athenæum will emphasize its strengths and work to enhance its reputation for providing responsive service to its membership.

#### **Brainstorming**

##### *Continuing to evolve*

The Athenæum strives to accommodate the membership as it and its tastes evolve. Information gleaned from a recently launched members segmentation analysis promises to shed fresh light on the diverse, international, multicultural group of people, across many stages of life, who enter this building every day.

##### *Fiction remains central*

The Athenæum has always collected fiction attractive to the membership and anticipates no change in that aspect. The desire for fiction persists but particular tastes have evolved; for example, in the nineteenth and early twentieth centuries, members read fiction in foreign languages. That is no longer the case, but members do enjoy foreign fiction in translation; therefore, the Athenæum seeks the best of that type of fiction.

##### *Consolidating a New England-focused specialization*

The Athenæum is particularly strong in nineteenth-century New England fiction and should strive to achieve the realistic goal of becoming the definitive source for nineteenth-, twentieth-, and twenty-first-century New England fiction—a commitment to regional specialization that would complement the strength of the special collections. Research would be necessary to determine gaps; for instance, an early twentieth century practice of renting new titles would require remediation.

##### *Quality above all*

Members enjoy quality books, both fiction and non-fiction, in English from small, independent publishers that do not appear on bestseller lists, in major

institutions, or in algorithmic linking on major bookselling websites. This parallels the Athenæum's international tract collection.

#### *Online resources*

Some members would like access to more digital newspapers. Staff—both reference librarians helping members and catalogers researching bibliographical details—could use many electronic resources that would only interest a small percentage of members. The small current number of users makes it untenable to prioritize large expenditures at present; however, it is an area of growth that will probably be expected by future members.

#### *Filling gaps in series*

Occasionally serials are incomplete because of disruptions in service or because of a partial donation, which proves frustrating for both the browser and scholar. Filling in gaps could be extremely expensive or impossible but very fulfilling.

#### *Children's books*

In selecting books for acquisition, the Children's Library strives to balance its historic collection with new works that reflect a wider range of diversity, prioritizing works by people of historically and currently marginalized groups. Achieving this goal includes expanding the scope of the nonfiction collection to be increasingly global. The Children's Library in particular is constrained by a small budget and small space. In keeping with the Athenæum's emphasis on the visual arts, collection of graphic novels for adult readers, and to meet the professed reading interests of current child and teen users, the Children's Library intends to expand its collection of graphic novels.

## **V. Procedures**

### **Book Selection Procedures Outline**

The primary responsibility for selecting books rests with the Subject Bibliographers, who are qualified staff members with specialized knowledge in a given subject area and/or long-term knowledge of a particular collection within the Library. The Athenæum created a profile with a jobber/subscription service that generates customized notification lists to Subject Bibliographers twice a month. Other staff members may give their suggestions for book purchases to the Subject Bibliographers for review. Subject Bibliographers convene regularly to discuss their selections with the Acquisitions Librarian who ensures that currency and relevancy are maintained within the various subject categories of the circulating collection and that a delicate balance is achieved between general interest books and scholarly books.

The Acquisitions Librarian and staff members meet monthly with an advisory committee comprising interested members with a history of engagement and a demonstrated understanding of Athenæum collections. The suggestions of this advisory committee, if approved by the Acquisitions Librarian, are shared with appropriate Subject Bibliographers for consideration. Once the suggestions have been considered and approved for the Athenæum, the books will be duly purchased and added to the collection.

Members may also submit suggestions, accompanied by a published review (provided with a reference librarian's assistance if necessary), by using an online form or adding to the binder held at the Circulation Desk. The Acquisitions Librarian and Subject Bibliographers assess these submissions. If they requested notifications, members learn whether their suggestion was accepted. No library today is able to provide all items for all members at all times without going beyond the limits of its own shelves and budgets. The Athenæum participates in interlibrary loan and may request materials out of scope for members who want them.



The Acquisitions Librarian orders books regularly. On average, the time between ordering books and placing them on the shelves is six weeks. The Serials Librarian oversees acquisition of new periodicals (in print and electronic format) and maintains current subscriptions. Rush orders are prioritized as necessary.

### **Subject Bibliographers**

**Acquisitions Librarian:**

Anthea Reilly

**Art and Architecture:**

[positions temporarily vacant]

**Bibliography and Book Arts:**

John Buchtel

**Children's Literature:**

Dani Crickman

**History, Biography, General Interest, Literature:**

Will Evans, Carolle Morini, Mary Warnement, Hannah Weisman

**Serials Librarian:**

Tom Gearty

### **Advisory Committee:**

Alexander Altschuller, Jacob Albert, Lina Coffey, Pam Ikauniks, Laurie Kent, Mary Otis Stevens

### **Jobber/Subscription Service Provider:**

**Books:**

Gobi Library Solutions (formerly named Yankee Book Peddler or YBP)

**Serials:**

LM Information Delivery, Inc. / LibNet (formerly Wolper)

### **Consortial Partners:**

Lyrasis/Nelinet

Massachusetts Library System established by Massachusetts Board of Library Commissioners

### **Regular Sources purchase:**

Publishers' webpages

Baker & Taylor

Amazon

## **VI. Policies**

### **Gifts Policy**

The Boston Athenæum will accept donated books that conform to the guidelines outlined in this Policy but is not actively soliciting gifts. Unsolicited gifts will not be added to the collection if they are deemed inappropriate for the collection. Donors will be asked for a list of books to be considered for donation. Any gifts that are out of scope, include duplicate material, or are in poor condition will not be accepted. In those cases, the book or books will be refused or sold and the money credited to Athenæum book funds. By law, the donor must pay for any appraisal of gift material.

### **De-accession Policy**

The decision to de-accession or weed a book or books is made by the Acquisitions Librarian and Subject Bibliographers. For clarity, consult the definitions below, taken from Joan M. Reitz, *Online Dictionary for Library and Information Science* (ABC-CLIO, 2004-2014), [http://www.abc-clio.com/ODLIS/odlis\\_A.aspx](http://www.abc-clio.com/ODLIS/odlis_A.aspx) (Accessed November 18, 2016).

**deaccession**

The process of deleting from an accession record documents and other materials that are to be removed from a library collection. Also refers to any item so removed.

**weeding**

The process of examining items in a library collection title by title to identify for permanent withdrawal those that meet pre-established weeding criteria, especially when space in the stacks is limited. Public libraries usually weed routinely on the basis of circulation. In academic libraries, weeding is done less frequently, usually only when the shelves become overcrowded, in anticipation of a move or an accreditation review, or when a significant change occurs in curriculum, such as the elimination of a major. Weeding should be undertaken judiciously because out of print titles can be difficult to replace. Compare with deselection.

**deselection**

In serials, the process of identifying subscriptions for cancellation, usually in response to subscription price increases and budgetary constraints. In book and nonprint collections, the process of identifying titles for weeding, usually on the basis of currency, usage, and condition.

The decision to de-accession many books or an entire collection requires the formation of a committee formed for that purpose. All de-accessioning decisions are guided by this Policy, applying the same standards of relevance, condition, scarcity, and merit to the book or books in question. The Athenæum makes a concerted effort to determine if other private or institutional libraries would be interested in acquiring the de-accessioned material.

Duplicate holdings of popular titles are de-accessioned once demand has subsided. The de-accessioning of superseded editions of reference works and collection holdings are made on a case by case basis.

**Interlibrary Loan (ILL) Policy**

The Athenæum encourages members to make use of interlibrary loan to obtain material not held by the Library. Both books and periodical articles may be requested in person, by phone, (617) 227-0270 x280 or by email ([illintern@bostonathenaeum.org](mailto:illintern@bostonathenaeum.org)). Forms are provided at both the Reference and Circulation Desks. Requests are normally filled within two weeks. Many items may be requested at no cost; however, when there is a charge from the lending institution, this cost must be passed on to the member, who would always have the chance to cancel the request. See below for more information. The following warning must be displayed on the webpage and where members make requests.

**WARNING CONCERNING COPYRIGHT RESTRICTIONS:**

The copyright law of the United States (Title 17, United States Code) governs the making of photocopies or other reproduction of copyrighted material. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the photocopy or reproduction is not to be "used for any purpose other than private study, scholarship or research." If a user makes a request for, or later uses, a photocopy or reproduction for purposes in excess of "fair use", that user may be liable for copyright infringement. This institution reserves the right to refuse to accept a copying order if, in its judgment, fulfillment of the order would involve violation of copyright law.

**How to Request Books**

After checking the online catalog to be sure that the Library does not own a particular book, a member need only provide the author and title of a work. A publication date is also helpful, but only necessary if a specific edition is wanted.

- Because of the small size of our staff and their many duties, members are asked to limit requests to no more than three or four books at a time or what they can reasonably read in the shortened loan period.

- Interlibrary loan books cannot be mailed to members. If unable to come to the Athenæum or arrange to have a book picked up, members are encouraged to use their local library's interlibrary loan service.
- While the Reference Department makes every effort to fill any request, some books are difficult or impossible to borrow—reference books, rare or non-circulating items, genealogies, local histories, as well as new books in heavy demand.
- Some material loaned to us may be used only under certain restrictions: “in library use only,” or “no photocopying allowed,” for example.

### How to Request Articles

If the Library does not subscribe to or keep a particular journal, members may request articles, which are sent as photocopies or scans. A complete citation is necessary: author, title, journal name, volume, date, and the inclusive page numbers of the article. The reference staff can assist members in finding an accurate and complete citation.

- Photocopied materials can be forwarded to members unable to come to the Library.
- Photocopies of specific newspaper articles can also be requested.
- Members are asked to keep their requests to no more than three or four articles at a time.

### How to Request Other Materials

The loan of non-print material can be rare. This kind of material includes microfilm, audio-visual tapes, DVDs, CDs, records, etc. The Reference Department can assess the likelihood of filling a specific request and try to suggest viable alternatives for accessing the material.

Many libraries will loan microfilm and will loan it for use in the building. The Library has a digital microfilm reader connected to a printer; information may be saved to a USB drive.

Libraries do not loan archival, rare, or manuscript material (unless available on microfilm), and even photocopies can be hard to obtain.

### **Off-site Storage Policy** **Background**

The Athenæum started using off-site storage for some of its holdings in 1942, when it was one of eight founding institutions of the New England Deposit Library (NEDL). It maintained this connection until 2005. In the 1980s, the Athenæum deposited some books with Iron Mountain in Lawrence, MA (see AR 1990). Then in 1999, with the onset of a major renovation, the Athenæum chose to move books from Iron Mountain and select more books to place with William B. Meyer / the New England Regional Depository (first in Franklin, MA; now in Windsor, CT) and consolidated materials from NEDL in 2005. Though items must be individually barcoded, William B. Meyer waived that recommendation and accepted 547 boxes of items that had been sent off-site before barcoding was standard.

The principal criteria was to prioritize and keep high-use collections at 10<sup>1/2</sup>. At first, a committee selected bound newspapers to transfer in 1942. Then volumes of foreign fiction by minor authors were selected to be stored off-site; major authors remained at 10<sup>1/2</sup>. That process was repeated for economic works. Then so-called parallel libraries (usually with a call number beginning with a colon) were selected. Items deemed worthy of future researchers but not crucial to current scholarship or general interest are regularly transferred to off-site storage.

The Athenæum is committed to long-term retention and preservation. The off-site environment is climate controlled.

### **Budget**

- The CFO negotiates annual storage costs.
- The Head of Reader Services approves invoices for individual transfers.

- LyraSIS bills the Athenæum for materials stored through participation in the New England Regional Depository.
- (William B. Meyer bills the Athenæum directly for records management materials, which are stored according to a separate retention policy.)

### **Current criteria for selection**

The Athenæum assesses its collections for transfer to off-site storage in order to keep the most used, most relevant, and most valuable items in its main facility at 10½ Beacon Street, Boston, MA.

The decision is reversible. The practice, since 2002, has been that more than three requests from members for an item from off-site storage results in the item's transfer back to 10½.

In an ongoing process, subject bibliographers, librarians, and curators assess collections to select items to transfer to off-site storage, usually when more space is needed for high-use collections. Children's books are selected quarterly for transfer to off-site. The goal of the Children's Library is to offer the best classics and the best current acquisitions.

Any items transferred must have good bibliographic access and be individually barcoded.

The following list, in no particular order, includes considerations that inform the process:

- Proximity to popular collections
- Subject
- Language
- Circulation
- Regional holdings
- Duplication (either in print or electronic resources)
- Age
- Condition

All holdings in the following list of Cutter call numbers are stored off-site.

#### **U.S. Government Documents**

- :°E
- :°F
- °A - °D
- °I - °K
- °R
- :5
- :9
- :B
- F
- :V
- :Y

### **Procedures for Transfer of Materials to and from Off-site storage**

Reference librarians determine whether there is a need for a transfer and consult staff who use those collections. Sometimes Systems is asked to provide a report on circulation statistics. When many items have been selected, Reader Services works with Technical Services to ensure an efficient work-flow. Catalogers create a file of metadata for items to be transferred, which the Head of Reader Services shares with William B. Meyer.

Occasionally, curators or librarians assess whether items should be returned to circulating stacks or Special Collections. The practice, since 2002, has been that more than three requests from members for an item from off-site storage results in the item's transfer back to 10½.

### **Access**

The Head of Reader Services acts as liaison with the off-site storage facility.