

 <b>DALHOUSIE UNIVERSITY</b> <i>Inspiring Minds</i>	<b>Dalhousie Libraries</b>	<b>Policy #</b>
	<b>Title: Dalhousie Libraries Gift Policy</b>	<b>Date Issued: November 19, 2015</b>
		<b>Date Revised:</b>
<b>Issued by: Associate University Librarian – Resources</b>	<b>Approved by: University Librarian</b>	

### 1. Purpose:

The purpose of this policy is to provide consistent guidance on the gift process for library donors and library staff. Dalhousie University Libraries collections have benefited greatly from monetary gifts, endowments and from gifts of print, manuscript, digital or electronic material. These and other gifts-in-kind enrich and enhance existing collections and support the instructional and research programs of the University. We are grateful for the generosity of our donors. The following guidelines apply to the Dunn, Kellogg, Killam, McRae and Sexton Libraries. For donations to Dalhousie Archives, please contact the University Archivist:  
Michael Moosberger  
Email: [Michael.Moosberger@Dal.Ca](mailto:Michael.Moosberger@Dal.Ca)  
Phone: (902) 494-5176

### 2. Roles and Responsibilities:

- a. The University Librarian is responsible for approving this policy.
- b. The Associate University Librarian – Resources (AUL-R) is responsible for the application and currency of this policy. The AUL-R will review the statement every two years for currency, accuracy and completeness. Revisions may also be made as the need arises. All revisions will be shared with the Office of Advancement for their advice.
- c. Library staff are responsible for the application of this policy.

### 3. Definitions:

- a. “Library Donor” refers to any person offering to provide the library

with monetary gifts, endowments or gifts of print, manuscript, digital or electronic material or other gifts in kind.

- b. "Staff" refers to library employees who correspond with donors, screen proposed donation lists, and otherwise apply these guidelines in the management of this policy.

#### **4. Gifts Policy:**

The Libraries reserve the right to accept or reject gifts. Any restrictions or exceptional terms attached to a donation must be specified at the time of the initial offer. Gifts become the property of the University and the Libraries reserve the right to determine the final disposition of gifts material. Duplicate or unwanted material may be sold, given away, or discarded.

##### **a. Screening**

All materials will be screened by a library subject specialist to determine their relevance to Dalhousie University's academic mission. The following factors are typically considered:

- i. alignment with current academic programs and scholarship (popular press paperbacks, cookbooks and other materials are not usually collected)
- ii. currency of the material where appropriate
- iii. physical condition
- iv. duplication of titles held
- v. available space in the stacks

##### **b. Lists**

The Libraries need a descriptive list of the material being offered, especially in cases where distance makes first-hand examination of the items impractical. A descriptive list ideally indicates the titles, age, format, and condition of the proposed donation.

##### **c. Unsolicited Material**

The Libraries will not accept material donations that have not been screened by a library subject specialist.

##### **d. Shipping Costs**

Shipping and packing costs will be borne by the donor.

##### **e. Appraisals and Tax Receipts**

Dalhousie can provide tax receipts for donations. If an income tax receipt is required, this should be indicated at the outset. The following limitations apply to the issuing of tax receipts:

- i. Income tax receipts may not be issued for items received as review, instructor, or complimentary copies.
- ii. Only materials added to the collection will be evaluated for income tax purposes.
- iii. Revenue Canada ordinarily accepts the estimate of a library subject specialist as the fair market value of the materials. Revenue Canada requires, however, external appraisals for collections worth more than \$1,000. Where an external appraisal is requested by the donor, it will be done at the donor's expense. The appraiser must be acceptable to both the library and the donor.

**f. Donor Recognition and In Memoriam Gifts**

At the donor's request, a book plate can be added to a gift item in memoriam or in recognition of the donor's contribution. Per the donor, notes are also added to the catalog record recognizing the donor's generosity.

**g. Electronic Material**

It is the responsibility of those making a gift of electronic resources to abide by all licensing, copyright or public performance regulations and restrictions attached to such items.

## **5. Monetary Gifts**

The Libraries accept monetary gifts to purchase materials and to support special projects and initiatives. Individual, corporate and foundation funding is actively sought to enable the Libraries to more fully serve the needs of all users.

To inquire about monetary donations to support the acquisition of library materials:

- a. **Killam, Kellogg or Sexton Libraries:** contact  
Stephen Harding  
Executive Director, Development  
Office of External Relations  
Email: [stephen.harding@dal.ca](mailto:stephen.harding@dal.ca)  
Phone: (902) 494-4576
  
- b. **Sir James Dunn Law Library:** contact  
Diane Chisholm, Development Officer, Faculty of Law.  
Email: [diane.chisholm@Dal.Ca](mailto:diane.chisholm@Dal.Ca)  
Phone: (902) 494-5112
  
- c. **MacRae Library:** contact  
Elaine MacInnis, Agricultural Campus Librarian.

Email: [Elaine.MacInnis@dal.ca](mailto:Elaine.MacInnis@dal.ca)

Phone: (902) 893-6670

More information is available on the [Give Back To Dal](#) website.

## 6. Library & University Contacts

If you wish to inquire about making a donation of print, manuscript, digital or electronic material, or other “gifts-in-kind” material, please contact one of the people listed below:

To find out more about **general policies regarding gifts**, or for books and other materials in the **humanities, fine arts, social sciences, physical and applied sciences, health sciences** contact

Patrick Ellis, Associate University Librarian – Resources

Email: [Patrick.Ellis@dal.ca](mailto:Patrick.Ellis@dal.ca)

Phone: (902) 494-1669

For **law** materials, contact

Linda Aiken, Assistant Law Librarian & Head of Acquisitions

Email: [Linda.Aiken@Dal.Ca](mailto:Linda.Aiken@Dal.Ca)

Phone: (902) 494-7145

For **agricultural and animal or food sciences** materials contact

Verna Mingo, Head of Acquisitions and Serials for MacRae Library.

Email: [Verna.Mingo@Dal.Ca](mailto:Verna.Mingo@Dal.Ca)

Phone: (902) 893-4581

For **architecture, design and engineering** materials, contact

Allison Fulford, Associate University Librarian, Discovery

Head Librarian, Sexton Design & Technology Library

Email: [Allison.Fulford@dal.ca](mailto:Allison.Fulford@dal.ca)

Phone: (902) 494-3255

For **music** materials (recordings and scores), and **rare printed materials**, contact

Karen Smith, Special Collections Librarian.

Email: [K.E.M.Smith@Dal.Ca](mailto:K.E.M.Smith@Dal.Ca)

Phone: (902) 494-8803

Dalhousie faculty and alumni are invited to discuss with the University Archivist the donation of their papers and the manuscripts of their works. More information is available on the University Archives and Special Collections [Donor Information](#) and [Records Transfer](#) webpages.