

 DALHOUSIE UNIVERSITY	Dalhousie Libraries' Gift Guidelines	<i>Date Issued:</i> April 2018
	<i>Issued by:</i> Associate University Librarian, Resources & Discovery	<i>Approved by:</i> The University Librarian

1. Purpose:

The purpose of these Guidelines is to provide consistent guidance on the gift process for library donors and for 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: archives@dal.ca

2. Roles and Responsibilities:

- a) The University Librarian is responsible for approving these Guidelines.
- b) The Associate University Librarian, Resources & Discovery (AUL, R&D) is responsible for the application and currency of this policy. The AUL, R&D, with the Scholarly Resources Management Group (SRMG) will review the Guidelines 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 advice.
- c) Library staff are responsible for the application of these Guidelines.

3. Definitions:

- a) "Library Donor" refers to any person offering to provide the Dalhousie Libraries 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.

4. Gift Guidelines:

The Libraries reserve the right to accept or to 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 gift material. Duplicate or unwanted material may be sold, given away, or discarded.

a) Screening

All materials will be screened by a library liaison librarian 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 library 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: titles, authors, publishers, publication dates, formats, and condition of proposed donations.

c) Unsolicited Material

The Libraries will not accept material donations that have not been screened by a library liaison librarian.

d) Shipping Costs

Shipping and packing costs will be borne by the donor.

e) Appraisals and Tax Receipts

Dalhousie University can provide tax receipts for donations. If an income tax receipt is required, this request 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 liaison librarian as the fair market value of the materials. Revenue Canada requires, however, external appraisals for collections worth more than \$1,000. When an external

appraisal is required, it will be completed at the donor's expense. The appraiser must be acceptable to both the Dalhousie Libraries and to the donor.

- iv. If there is a delay processing the donation and the Libraries cannot issue a tax receipt in the same year that a donation is given, this information will be communicated to the donor.

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

At the donor's request, a book plate may be added to gift items in memoriam or in recognition of the donor's contribution. Per the donor, notes may also be added to the catalogue records 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 or endowments to support library collections and initiatives, please contact:

- a) For Killam, Kellogg or Sexton Libraries
Stephen Harding, Assistant Vice-President Development
Office of Advancement
Email: stephen.harding@dal.ca
Phone: (902) 494-4576

- b) For the Sir James Dunn Law Library
Anne Matthewman, Associate University Librarian, Learning & Teaching and Chief Law Librarian
Email: anne.matthewman@dal.ca
Phone: (902) 494-6301

- c) For the MacRae Library
Elaine MacInnis, Associate University Librarian, Services and Head, MacRae Library
Email: elaine.macInnis@dal.ca
Phone: (902) 893-6670

More information is available on the Dalhousie University [Giving](#) 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”, please visit the Libraries’ [Gift Policy](#) website for contact information.

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’ [Donor Information](#) and [University Records](#) webpages.