IMAGINEIF LIBRARIES
POLICY 5000: COLLECTION DEVELOPMENT AND MANAGEMENT POLICY

The purpose of the Collection Development and Management Policy is:
- To document collection management procedures;
- To guide staff in the selection, retention, and withdrawal of library materials;
- To inform the public of the philosophy of collection development and the policies involved; and
- To establish a framework for continuous collection evaluation and improvement.

COLLECTION OBJECTIVE
The ImagineIF Libraries’ collection is developed based upon community interests and needs, the composition and use of the existing collection, and input from customers, staff, and the Library Board of Trustees. ImagineIF Libraries’ Collection Development Policy reflects the three pillars of Strategic Plan for the Future, 2015-2017: Explore, Connect, Create.

ImagineIF’s primary service commitment is to the people within its service area, including people of every age, education, background, personal philosophy, religious belief, occupation, economic level, ethnic origin and human condition. The collection contains information on a variety of subjects and views, and is organized to provide unrestricted and easy access within the limitations of space and budget. All ImagineIF materials are intended for public use and, with the exception of selected special or reference collections, all materials are available for check-out.

COLLECTION RESPONSIBILITY
The Board of Trustees vests responsibility for selection of library materials in the Library Director under guidelines established by the Board. Members of the staff, qualified by reason of education and/or experience, serve on the Collection Management Team and are assigned to assist with the selection of materials.

GENERAL COLLECTION DESCRIPTION
The library collections are comprised primarily of popular materials directed toward the general public and an effort is made to have the most current information available. There is a special collection of materials that focuses on the history of Flathead County and surrounding areas. Older general material is held only if it has local historical significance.

COLLECTION PHILOSOPHY
ImagineIF endorses the following American Library Association statements:
- Library Bill of Rights See Appendix A
- Freedom to Read See Appendix B
- Freedom to View See Appendix C

ImagineIF upholds the right of the individual to secure information, even though the content may be controversial, unorthodox, or unacceptable to others. Materials available present a diversity of viewpoints, enabling citizens to make the informed choices necessary in a democracy.

See the appendices to this document, adopted by the Board of Trustees, which include the statements above and various interpretations of the Library Bill of Rights.

SELECTION CRITERIA
The criteria for selection, acquisition, customer requests, duplication, replacement, and withdrawal (weeding) are the same for all materials and formats. Selection of materials is
driven by customer demand in all formats for all ages. Items do not need to meet all criteria to be selected, nor does fulfillment of criteria necessarily guarantee selection.

CRITERIA:
- Customer demand and interest
- Critical reviews
- Presentation and readability
- To balance all sides of an issue
- Author's reputation and significance as a writer
- Reputation and standing of the publisher
- Local or national significance
- Availability of the material or information elsewhere
- Quality of the physical format
- Reasonable cost

In most cases, the library will not purchase or accept as gifts self-published materials that are not reviewed in established review journals.

The electronic collections available through MontanaLibrary2Go are part of a statewide consortium. These materials are selected and withdrawn by a cooperative committee, not by ImagineIF staff, and are subject to separate collection development policies and procedures. MontanaLibrary2Go is administered by Montana State Library and by two committees: an elected Executive Committee and a volunteer Selection Committee.

MontanaLibrary2Go Policies and Procedures

WITHDRAWAL OF MATERIALS
Staff shall review the collection on an ongoing basis with the goal of maintaining the quality and vitality of the library collections. This process of collection management incorporates continuous collection evaluation through the use of circulation reports and analysis of collection use. Worn, damaged, and dated materials shall be removed from the collection on a regular basis. Materials may also be withdrawn if they are not used or are superseded by a new edition or a more authoritative work on the same subject. Other criteria that may be applied include the changing demands of users, replacement of materials with other formats, space, and collection balance. Withdrawn materials will be disposed of in the manner deemed most appropriate for that item. Methods of disposal may include the free shelf at ImagineIF Kalispell, sale by affiliated support groups, distribution to other libraries or community service organizations, or recycling.

SPECIAL COLLECTION
The Special Collection is established to collect, preserve, and make available for research primary and secondary archival materials relating to Flathead County. The Special Collection is a repository for materials primarily concerned with Flathead County, Montana. Less extensively collected are materials related to northwest Montana and to the State of Montana as a whole. Materials with no connection to these geographic regions may occasionally be included for their protection or preservation.

Since materials in the Special Collection are intended to provide an ever-available source of information on Flathead County, they are for use only in the library. Customers may use items from the Special Collection in any ImagineIF location. When a customer requests that an item from the Special Collection be sent to a satellite location, the item will be transported there by the library courier and will remain available for a limited number of
days. Items judged to be irreplaceable or too fragile to transport may be used only at ImagineIF Kalispell.

**DONATION OF LIBRARY MATERIALS**

The Library Board of Trustees welcomes the generosity and thoughtfulness of the community in supplementing the library collections through monetary donations and memorials. The Board requires that all such gifts, grants, donations, devises, or bequests be accepted on its behalf by the Library Director in keeping with guidelines established by the Board.

Donated materials are accepted with the understanding that they will be handled or distributed through balancing the best interests of the library system with the intent of the donor. Most items will be given to the Friends of the Library to sell at their annual book sale. Upon request, ImagineIF Libraries will provide the donor a receipt, but will not appraise the value of donated items.

Donors of funds for the purchase of library materials are encouraged to provide some guidance in the selection of materials by specifying an appropriate broad subject area. While taking under advisement the donor request, ImagineIF Libraries reserves the right to the final decisions regarding all materials. Library materials purchased with donated funds may be designated by a bookplate or other appropriate identification.

Donated and memorial materials are subject to the same standards as the rest of the library collection. The criteria for selection and withdrawal of library materials apply to all items in the library collection, regardless of their origin. Once a gift is accepted, it becomes the property of ImagineIF Libraries, to be used or disposed of in accordance with the policies established by the Board of Trustees. All materials will be shared by the entire library system and will be made available to all borrowers, including participants in the Montana Shared Catalog Partners Resource Sharing Group.

Monetary gifts, grants, donations, and bequests shall be placed in the ImagineIF Libraries Gift and Memorial fund to be expended. If a monetary gift, donation, or bequest is substantial, and if the intended purpose allows such transfer, the Board of Trustees may consider transferring it to the ImagineIF Library Foundation for investment and management in keeping with the intent of the donor.

ImagineIF Libraries will not return unsolicited materials, nor will it be responsible for payment of costs incurred when unsolicited materials are sent. Unsolicited materials will be added to the collection or disposed of accordingly.

**HOLDS RATIO**

ImagineIF maintains a 4:1 hold ratio for books, a 5:1 ratio for audio recordings and DVDs. In rare instances, copies from other Partner Libraries are included in calculating the holds ratio. Downloadable materials on MontanaLibrary2Go are part of a state-wide consortium. The holds ratio for these items is set and overseen by an outside selection team.

**COMPLAINTS AND CENSORSHIP**

ImagineIF Libraries believes in freedom of information for all, and does not practice censorship. The selection of library materials is based on a person’s right to read, listen, and view and the freedom from censorship by others. Attempting to meet the needs and interests of a diverse population requires a wide range of materials. Inevitably, there will be something in a balanced collection that may be unacceptable or disturbing to someone.
ImagineIF Libraries holds censorship to be a purely individual matter and declares that while anyone is free to personally reject materials of which he or she does not approve, he or she may not exercise censorship to restrict the freedom of others.

Responsibility for materials selected and read by children and adolescents rests with their parent or legal guardians. Selection decisions are not influenced by the possibility that materials may be accessible to minors. Materials are not labeled to show approval or disapproval or to indicate certain philosophies. No items are sequestered except to protect them from damage or theft.

Criticism and comment on material selected for inclusion in or exclusion from the collections is an essential right of community members and a valuable part of the ImagineIF Libraries' selection process. This process provides an opportunity for staff members to reexamine choices and reasoning.

The Library Board of Trustees acknowledges that occasional objections to resources will be made despite the care taken and the procedures followed in their selection. The Library Board and library staff are prepared to defend the principles of freedom to read and access information. Objections to particular language or point of view of material cannot be used as justification for the exclusion of materials.

If a complaint cannot be resolved informally, the complainant will be asked to fill out and return a written and signed Citizen Comment on Library Materials Form. This form may be obtained from any ImagineIF staff member. In the absence of a fully completed form there is no formal complaint and no action will be taken. After the library director has received a fully completed written complaint, she or he shall establish a review committee to investigate the complaint. The committee's recommendation is then presented to the Library Board of Trustees for a final decision.

Adopted: 4/09/2008
Revised: 9/22/2011
Revised: 10/22/2014
Revised: 10/25/2017

Terry Guidi, Vice-Chair
Library Board of Trustees
Develop standards and processes for collection management and selection

- Suggest improvements to materials processing
- Direct merchandising, including collection placement
- Curate online tools and resources
- Actively explore new and innovative collections
- Direct spending of library materials budget
- Maintain weeding and transfer schedule
- Optimize flow of materials between locations
- Identify projects to achieve collection performance goals
- Set collection performance goals to achieve strategic objectives
- Engage with philosophical issues and emerging trends

DUTIES AND RESPONSIBILITIES

- Library Director/Asst. Director
- Tony Edmondson
- Rebecca Johnson
- Sharr White
- Karl Wilson
- Sean Anderson

Current Members

Team:

Includes representatives from departments and locations best suited to carry out the duties and responsibilities of the...
<table>
<thead>
<tr>
<th>Month</th>
<th>June</th>
<th>May</th>
<th>April</th>
<th>March</th>
<th>February</th>
<th>January</th>
<th>December</th>
<th>November</th>
<th>October</th>
<th>September</th>
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</thead>
<tbody>
<tr>
<td>Fiscal Year</td>
<td>Review Budget goals for next fiscal year</td>
<td>Review Budget Status</td>
<td>Review Budget Status</td>
<td>Review Budget Status</td>
<td>Review Budget Status</td>
<td>Draft materials budget</td>
<td>Approve materials budget with Director</td>
<td>Approve performance goals</td>
<td>Set performance goals by collection goals with Director</td>
<td>Identify projects to accomplish performance goals</td>
</tr>
<tr>
<td>Strategic Development</td>
<td>Review Strategic Plan</td>
<td>Review Projects</td>
<td>Review Projects</td>
<td>Review Projects</td>
<td>Brainstorm proposal(s) for collections, services</td>
<td>Explore changes to collections, services</td>
<td>Reviews</td>
<td>Schedule, CHQ</td>
<td>Review Weeding Schedule, CHQ</td>
<td>Review Weeding Schedule, CHQ</td>
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<td>Selection</td>
<td>Submit collection development proposals to LT</td>
<td>Submit collection development proposals to LT</td>
<td>Submit collection development proposals to LT</td>
<td>Submit collection development proposals to LT</td>
<td>Submit collection development proposals to LT</td>
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<td>Submit collection development proposals to LT</td>
<td>Submit collection development proposals to LT</td>
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<tr>
<td>Other</td>
<td>Begin Ordering for upcoming Fiscal Year</td>
<td>Final purchase orders submitted to vendors</td>
<td>Final purchase orders submitted to vendors</td>
<td>Final purchase orders submitted to vendors</td>
<td>Final purchase orders submitted to vendors</td>
<td>Final purchase orders submitted to vendors</td>
<td>Final purchase orders submitted to vendors</td>
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<td>Final purchase orders submitted to vendors</td>
<td>Final purchase orders submitted to vendors</td>
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</tbody>
</table>

**Note:** The table is incomplete and cut off, making it difficult to understand the full context. The entries suggest a monthly planning and development schedule, likely related to budget, strategic planning, and selection processes. The entries for July are not visible, and the table ends abruptly, preventing a complete understanding of the monthly tasks and priorities.
DIGITAL MATERIALS
MARCH 2022

MONTANALIBRARY2GO
Collaborative service administered by the MT State Library. Based on Overdrive’s platform it offers downloadable audiobooks (>15k titles), ebooks (>25k titles), and magazines (4k titles) for use on personal computers, e-readers and portable media players.

CREATIVEBUG
Creativebug.com has more than 1,000 award-winning art & craft video classes taught by recognized design experts and artists.

EBSCO DBS
Peer-Reviewed research and periodical database. Includes access to over 1,000 full-text reference publications, more than 800 full-text newspapers, as well as a comprehensive collection of biographies of notable people and personalities.

LINKEDIN LEARNING
Online courses for professional skill-building. Used internally for staff development, and extended publicly during COVID to help address spike in unemployment.

HERITAGEQUEST
Online genealogical research service. Provided in collaboration with Missoula Public Library, and offers genealogical materials, including Census records, books and articles. Digitized images are fully searchable and printable.

TUMBLEBOOKS
Animated, talking picture books that teach young children the joys of reading in a format they’ll love.

NOVELIST
An extensive database of fiction and nonfiction for adults, teens and children, including book reviews, author read-alikes, book discussion guides and more.

FOUNDATION DIRECTORY ONLINE*
The leading online funding research tool, containing the most current, accurate and comprehensive information available on grantmakers and their grants. Also includes access to sources for scholarships, fellowships, grants, awards and other financial support with the only online resource devoted exclusively to foundations that fund individuals.

*FDO has been funded by outside organizations since 2012, and is not reflected in the Library’s expenditures

HOOPLA (DISCONTINUED)
FLIPSTER (DISCONTINUED)

FY2021 USAGE

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<tr>
<th></th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>Total</th>
<th>% of Total Use</th>
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<td>CreativeBug</td>
<td>121</td>
<td>207</td>
<td>105</td>
<td>101</td>
<td>174</td>
<td>118</td>
<td>109</td>
<td>165</td>
<td>169</td>
<td>261</td>
<td>491</td>
<td>251</td>
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<td></td>
<td></td>
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<td>223</td>
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<td>1,134</td>
<td>1,176</td>
<td>1,944</td>
<td>1,988</td>
<td>1,883</td>
<td>2,054</td>
<td>2,121</td>
<td>2,077</td>
<td>669</td>
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<td>Lynda</td>
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<td>39</td>
<td>18</td>
<td>5</td>
<td>11</td>
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<td>8</td>
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<td>6</td>
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<td>20</td>
<td>180</td>
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<td>Overdrive</td>
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<td>6,382</td>
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<td>9,191</td>
<td>9,027</td>
<td>8,762</td>
<td>9,475</td>
<td>8,525</td>
<td>8,525</td>
<td>15,764</td>
<td>18,231</td>
<td>10,986</td>
<td>8,367</td>
<td>115,684</td>
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<tr>
<td>EBSCO Dls</td>
<td>39</td>
<td>59</td>
<td>12</td>
<td>169</td>
<td>17</td>
<td>139</td>
<td>153</td>
<td>17</td>
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<td>107</td>
<td>78</td>
<td>67</td>
<td>849</td>
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<td>Grand Total</td>
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<td>7,962</td>
<td>7,920</td>
<td>11,212</td>
<td>11,158</td>
<td>10,834</td>
<td>11,625</td>
<td>10,831</td>
<td>18,345</td>
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<td>22,436</td>
<td>9,730</td>
<td>142,222</td>
<td>100.0%</td>
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Policy 2020. Management and Development of Library Collections

Mission: The mission of the Whitefish Community Library (WCL) is to bring people and ideas together by providing and sharing information, inspiring lifelong learning, advancing knowledge and strengthening our community.

Purpose: The collection management and development policy serves a number of purposes:

• It guides the Whitefish Community Library and its professional staff in the selection, retention and disposal of library materials. • It assists the Library in maintaining a collection that meets the multiple and varied interests of its library patrons. • It serves as a planning device for the Board of Trustees and the Library staff. • It helps to ensure that the collection is broad and diverse, and includes subjects and ideas that are safe, comfortable, unorthodox and challenging. • It reflects the breadth of ideas that exist in a free marketplace. • It respects the right of its library patrons to explore those ideas for themselves and their families. • It reemphasizes the commitment of WCL to the principles of intellectual freedom adopted by the American Library Association and expressed in the Library Bill of Rights and the Freedom to Read and Freedom to View Statement which are appended to this policy.

The Whitefish Community: The Whitefish Community Library is located in small town in the northwest corner of a large, sparsely-populated state. It is surrounded by mountains, lakes, national and state forests and a well-known national park. Because of its scenic location, it is a popular tourist destination in both summer and winter for such recreational opportunities as hiking, boating, skiing, camping, golfing, white water rafting and mountain biking.

The Whitefish Community Library: Whitefish Community Library has issued over 12,500 library cards. The vast majority of those cards are held by people who live in Whitefish or the surrounding area, but patrons also come from neighboring communities, counties, and out of state. About 16% of the cards have been issued to children, and slightly less than 10% are temporary cards issued to part-time residents and visitors.

The Library currently has about 82,800 items in its collection. Almost 30% of those items are E-books or audio materials, which reflects the changing nature of modern libraries. Those electronic materials are available through MontanaLibrary2Go, a statewide consortium of electronic resources available to the general public. About 47% of the Library's holdings are for adults; 22% of the collection is appropriate for juvenile readers; and the remainder of the collection is made up of materials for young adults, children or media users.

In addition to its regular library card holders, WCL also permits library patrons from Partners' sharing consortium-to check out its materials. That collective of over 36 libraries means that the Whitefish Community Library has users from other Montana communities like Kalispell, Libby, Columbia Falls, Eureka, Poison and Missoula, Hamilton and more. This allows WCL patrons to access over 1,000,000 materials.

Because the Whitefish Community Library is an active member of the Partners' sharing consortium and its shared resources, the Whitefish Community Library borrowed over 15,737 items from consortium members for its patrons in 2020/2021. It loaned 16,317 books and materials to its Partners' libraries in that same time period. When the Montana library consortium could not satisfy a patron's request, WCL Interlibrary borrowed 41 items from other libraries throughout the United States and loaned 82 items to other libraries. In typical years the Whitefish Community Library counts over 80,000 library users, including those who walk through the door and those who borrow materials through these alternative sharing methods.

Special Collections: The Library has a substantial collection of written materials about Montana covering its history, its national parks, its Native American tribes, and its authors. It has microfilm of the editions of the local Whitefish Pilot newspaper back to 1904, and it also has a modest reference book collection. The Library has a few regional maps. It also has an excellent collection of large print books.

Core Collection: The Whitefish Community Library will follow the American Library Association's guidelines for small libraries in maintaining and developing a core collection of materials for its library patrons.

Future Acquisitions: In purchasing materials for the Whitefish Community Library, the staff will consider, first and foremost, the expressed needs and desires of its patrons. Materials of historical importance will remain an important part of the collections, offset with more contemporary or popular materials. Non-fiction materials will be reviewed periodically to ensure that the Library's holdings are reasonably up-to-date, diverse and informative. In making its purchasing decisions, the library will consult a number of sources, including:

• Booklist • Library Journal • Publishers Weekly • New York Times Book Review • Best seller lists from the New York Times and U.S.A. Today • Pulitzer Prize, Edgar, National Book Award and National Critic's Choice Award winners and nominees • VOYA (Voice of Youth Advocate) • Publishers and distributor catalogs

The Library will also make an effort to include works by local and area authors in its collection, although it may be selective in adding...
Donated Materials: Library patrons have played an important role in the development of the Whitefish Community Library's collection, because of their generous donation of used books, audio books and videos. Those donations were especially important in the early days of the Library's existence as an independent entity in 2011, and they continue to supplement the Library's acquisitions budget.

In deciding whether to add donated materials to the Library's holdings, the staff will determine: • If the donation is currently in the Library's collection; • If the donated item should be duplicated in the collection; • If the donation is in better condition than the Library's current copy; • If the donation supplements the Library's current collection.

Exclusions from the Collection: The Whitefish Community Library does not collect the following items: encyclopedias, abridged works, archival materials, dissertations; year books, textbooks; specialized training or curriculum materials; medical materials, except those of a general nature; and genealogy materials, except those of a general nature. In general, the Whitefish Community Library usually buys appropriate numbers of copies of titles, relying on donations to supplement more popular holdings. If patrons place multiple reserves on a particular book or materials, the Library staff may purchase additional copies.

Collection Maintenance: The Whitefish Community Library collection is continually curated, and any damaged, outdated or uncirculated materials may be removed. Because of the space limitations, the Library must make room for new acquisitions by removing materials that have not been used by its patrons and no longer seem relevant to the collection. Removed materials will either be sold, recycled or donated to other non-profit organizations for libraries.

Reviewed and Approved by the Whitefish Community Library Board of Trustees on 2022.

Sarah Ericson, Chair

Temporary hours
• Monday – 10 AM to 7 PM
• Tuesday – 10 AM to 6 PM
• Wednesday – 10 AM to 6 PM
• Thursday – 10 AM to 6 PM
• Friday – 11 AM to 5 PM
• Saturday – 12 PM to 5 PM
• Sunday – Closed

Upcoming Events
• In The Hurricane's Eye - WCL Book Discussion Group (04/27/2022)
• April 28 StoryCircle: Wind (04/28/2022)
• Reading Education Assistance Dogs (R.E.A.D.) (05/03/2022)
• May 5 StoryCircle: Mom's Day Tea Party (05/05/2022)
• Whitefish Women's Book Club (05/11/2022)

Whitefish Community Library
9 Spokane Ave
Whitefish, MT 59937
(406) 862-9914
FAX: (406) 862-1407
Joey Kositzky, Director

Whitefish Community Library makes every effort to ensure that everyone may access the resources of our library including online resources through our website. If you cannot access a resource or service please contact your library staff at 406-862-9914.

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LEWIS & CLARK LIBRARY
COLLECTION DEVELOPMENT POLICY

MISSION STATEMENT

The Mission of the Lewis & Clark Library is to provide the best possible services and materials for informational, educational, cultural, and recreational use by the community.

POLICY

The Collection Development Policy provides a framework for the growth, development, maintenance, and distribution of collections in support of the Library’s mission. It also serves as a resource for planning and long-range development. It provides accountability to the Board, staff, and users. It is designed to be flexible and responsive.

It is the Library’s goal to provide the community with library materials that reflect a wide range of views, expressions, opinions, and interests. Specific acquisitions may include items that may be unorthodox or unpopular with the majority or controversial in nature. The Library’s acquisition of these items does not constitute endorsement of their content but rather makes available its expression.

The Library provides free access to materials in a number of formats (print, media, and electronic) to all citizens of Lewis and Clark County. Library users make their own choices as to what they will use based on individual interests and concerns. Lewis & Clark Library supports the right of each family to decide which items are appropriate for use by their children. Responsibility for a child’s use of library materials lies with that child’s parent or legal guardian. Lewis & Clark Library adheres to the principles of intellectual freedom adopted by the American Library Association as expressed in the Library Bill of Rights and the Freedom to Read and Freedom to View Statements.

THE LIBRARY AND ITS COMMUNITY

Thirty-two percent of the materials checked out of the Lewis & Clark Library are children’s books and toys. Children’s books include the young adult, juvenile fiction and juvenile non-fiction collections. As of December 2018, thirty-five percent of circulation consists of books in the adult collection. Twenty-three percent of circulation is covered by the audio and visual collections, and the remaining nine percent of circulation is the downloadable audio and e-book collection through MontanaLibrary2Go, Axis 360, and Hoopla.
Helena and Lewis and Clark County are centers of government with the largest employer being the State of Montana and the second largest employer being local government, including the school districts, the city of Helena, and Lewis and Clark County. As such, the Lewis & Clark Library serves a highly educated population when compared to the state as a whole. This also means that the community is relatively stable in terms of economic growth and has not seen the highs and lows of other parts of the state. Helena and Lewis and Clark County are also very homogeneous communities in terms of race. They are also aging communities and although Lewis and Clark County is a younger community than surrounding counties, the average age continues to increase.

**PATRON NEEDS AND SERVICES**

The Lewis & Clark Library attempts to provide for the general reading and viewing needs of the public. The Library has made a conscious decision not to collect abridged materials except for select audio items. The Library provides special collections, such as the Montana and Large Type collections, which address special needs. The Library is also part of a statewide consortium, MontanaLibrary2Go, which provides electronic materials for the public.

The Library provides access to interlibrary loan and various online databases to fill needs unmet by our materials collection.

**THE COLLECTION**

The Lewis & Clark Library's collection of about 120,000 books, magazines, and other media provides a basic level collection of literary, cultural, educational, informational, and recreational materials for people of all ages. The collection is composed principally of materials in English. In addition to popular print titles, special formats such as large type, CDs, DVDs, periodicals, microfilm, vertical file materials, maps, electronic media, and realia, such as puppets and the Library of Things, are included in the collection.

New formats shall be considered for the collection when, by industry report, national survey results and evidence from local requests, a significant portion of the community population has the necessary technology to make use of the format. Availability of items in the format, the cost per item, and the Library's ability to acquire and handle the items will also be factors in determining the decision to add or delete a format from the Library's collections. Materials are selected and removed from the collection according to the Lewis & Clark Library's Material Selection and Removal Policy.

**Future Acquisition Levels**

The Lewis & Clark Library is committed to maintaining a balanced basic level collection in all areas while being responsive to new trends that develop and stabilize. Major review sources including: Booklist, Library Journal, School Library Journal, Hornbook, and VOYA are used to select new items in the areas that are collected. All fiction collections and large type are weeded on a regular basis. The weeding of the non-fiction and media collections are done on a rotating schedule, depending on space and collection analysis needs.
Exclusions:

The Library does not collect the following: abridged works; archival materials; Braille and other materials for the blind; film; dissertations; yearbooks; specialized training or curriculum materials; medical materials, except those of a general nature; genealogical materials, except those of a general nature; and materials for the specialist housed in a variety of special libraries.

*The Library is home to the Lewis & Clark Genealogical Society, which maintains a small, specialized collection of genealogical resources and materials.

COOPERATIVE COLLECTION MANAGEMENT AND INTERLIBRARY LOAN

Cooperative Collection Management:

The Lewis & Clark Library subscribes to the theory of resource sharing and cooperative collection management and endeavors to avoid duplication of expensive or rare materials within the Helena area. Lewis & Clark Library cardholders have access to materials at the Montana State Library, the Corette Library at Carroll College, and Helena College University of Montana.

The library joined the Montana Shared Catalog (MSC) in 2019 with the intention to participate in resource sharing. This will allow Lewis & Clark Library users access to additional materials from other Montana libraries through a more streamlined and user-friendly method of ILL. The library will reciprocate by making available items within the collection to other MSC members.

Interlibrary Loan:

Interlibrary loan is an integral element of collection development for Lewis & Clark Library. Lewis & Clark Library lends and borrows materials to and from other libraries following its Interlibrary Loan Policy and protocols. The Lewis & Clark Library’s Interlibrary Loan policy and procedures are informed by the 2001 National Interlibrary Loan Code and the Montana Interlibrary Loan Sharing Protocol revised October 7, 2009.

The Lewis & Clark Library maintains online connections to OCLC and uses its system interlibrary loan subsystem.

GENERAL PRIORITIES, LIMITATIONS, AND POLICIES

Multiple Copies:

The Lewis & Clark Library generally buys one copy of titles, except for titles in high demand. In general, high demand is defined as three or more reserves per copy of a title. Whenever possible, multiple copies are supplied through lease books or donations.

Languages:
The collection is primarily in English.

Responsibilities and Selection Procedures:

Responsibilities and selection procedures are found in the Lewis & Clark Library's Material Selection and Removal Policy.

Complaints and Challenges:

Collection review procedures are found in the Lewis & Clark Library's Material Selection and Removal Policy.

Collection Maintenance:

The collection is weeded according to the policies found in the Lewis & Clark Library's Material Selection and Removal Policy.

Gifts:

Gifts are a valuable source for enriching the Library's collection. The Library will accept donations or gifts provided that the Library has complete control over decisions regarding disposition of all materials and money for materials. All gift materials are subject to the same criteria specified in the Material Selection and Removal Policy. The Library has the right to refuse any gift that would violate established selection policy and criteria. The Library will not assess the value of donated materials. Donors may provide a list of donated materials which can be signed as a receipt, but library staff will not develop such a list.

Final disposition of all donated materials rests with the Library.

Reviewed and Amended by the Board of Trustees February 19, 2019
Reviewed and amended by the Board of Trustees December 15, 2015
Reviewed and amended by the Board of Trustees December 18, 2012
Reviewed and amended by the Board of Trustees December 14, 2010
Reviewed and amended by the Board of Trustees December 16, 2008
Reviewed and amended by the Board of Trustees May 23, 2006
Reviewed and amended by the Board of Trustees June 8, 1999
Reviewed and amended by the Board of Trustees February 15, 1995
Adopted by the Board of Trustees December 9, 1985
LEWIS & CLARK LIBRARY
MATERIAL SELECTION AND REMOVAL POLICY

POLICY

The purpose of the Materials Selection and Removal Policy is to list the general standards used to select materials in accordance with the Lewis & Clark Library's mission statement.

Selection Policy Objectives:

A written material selection and removal policy serves as a guide to library personnel involved in materials selection and de-selection. It aids them in keeping sight of the goal of selecting and acquiring a useful, well-rounded materials collection to meet the particular needs of the community served.

A written selection and removal policy helps the Library Board instruct new board members about existing policy and assists the Board in determining whether the staff is doing an acceptable job of building a collection of materials that is relevant to current needs.

A written selection and removal policy will help to explain to library employees and other interested parties the basis on which materials have been selected or de-selected.

Preamble:

The Board of Trustees of the Lewis & Clark Library recognizes that American democracy functions best only if the full range of human ideas is accessible to the people. Proponents of various points of view must be able to make their cases fully and openly, however popular or unpopular they may be.

This principle has fostered freedoms guaranteed in the First Amendment of the United States Constitution and in Article II, (Section 7) of the Constitution of the State of Montana. These basic charters protect the free expression of ideas and the private reading rights of individuals. Lewis & Clark Library regards these freedoms and the principle that fostered them as paramount to its philosophy, purpose, and operation.

The Library collection, protected by the First Amendment and the Constitution of the State of Montana, exists for the benefit of its patrons. The primary benefit offered by the Lewis & Clark Library is access to a marketplace of ideas, accounts, and approaches that are varied, divergent, and inclusive.
The collection of the Lewis & Clark Library, in accordance with the Library Bill of Rights, the Freedom to Read Statement, the Freedom to View Statement, and the Joint ALA Chapter Statement Regarding E-Content Pricing which by reference are incorporated as part of this policy (see Appendices A, B, C and F) is designed to fulfill this democratic ideal.

SECTION I: OBJECTIVES OF THE COLLECTION

The Library collection will be developed and maintained to enable all individuals to find the library materials and information that they want according to their own free choices.

The collection, taken as a whole, will be an excellent source of information and will include as wide a selection as possible. Subjects and viewpoints will be covered in sufficient depth to meet established and anticipated needs.

Selection of materials by the Library does not mean endorsement of the contents or views expressed in those materials. The collection as a whole will be sufficiently diverse to promote no causes, to further no movements, and to endorse no viewpoints.

SECTION II: SELECTION

Authority to select library materials is vested in the Director of the Lewis & Clark Library. The Director may authorize qualified staff to assist with selection. Such library materials will be deemed to have been selected by the Board of Trustees.

Factors to be considered in adding specific materials to the Library collection will include the composition of the present collection, collection development objectives, suitability of physical format for library use, reviews from standard sources, availability of material elsewhere in the area, and price. Additionally, one or more of the following factors may be considered, as appropriate to the type of material: comprehensiveness or depth of information for the intended audience, accuracy of information, current or historical significance of author or subject as a document of its times, appearance of the title in special bibliographies or indices, diversity of viewpoint, effective expression, creativity, imagination, reading enjoyment, popularity and demand. In general the Library does not collect self-published works. No materials will be excluded from consideration because of the race, nationality, religion, gender, gender identity or expression, sexual orientation, immigration status, political or social view of the material, the author or the intended audience.

Individual items, which in and of themselves may be controversial or offensive to some patrons, may appropriately be selected if their inclusion will contribute to the range of viewpoints and effectiveness of the Library collection as a whole.

The Library encourages its patrons to suggest items, topics, or authors they would like to see included in the collection. Patron suggestions will receive serious consideration and requested materials that fit selection criteria will be purchased whenever possible.
The Library is part of the statewide consortium, MontanaLibrary2Go, that provides e-media to libraries around the State of Montana. As a selecting member of the consortium, the Library follows the MontanaLibrary2Go Materials Selection Policy when selecting items for the consortium collection (Appendix E).

SECTION III: ACCESS

The Board of Trustees recognizes confidential access to as broad a range of information as possible is essential for patrons to exercise their rights as citizens.

The Board believes that reading, listening, and viewing are individual, private matters. Patrons are free to select or reject materials for themselves or their own minor children, but not to restrict the freedom of others to read or inquire.

As an agency of government, the Library cannot prescribe what material is appropriate for any of its patrons. Only parents and guardians, not the Library, have the right to guide and direct the reading, listening, and viewing choices of their own minor children. The Library does not stand in loco parentis.

The Library collection will be organized and maintained to facilitate access. No materials will be labeled, restricted, sequestered, or altered because of any controversy about the author, subject matter, or intended or potential audience.

SECTION IV: REQUEST FOR RECONSIDERATION OF MATERIALS PROCEDURE

The Board of Trustees acknowledges the right of residents of Lewis and Clark County to question materials in the Library collection. Anyone questioning materials in the Library collection should be referred to the Director or the Collection Management Librarian who will discuss the matter and give the patron a copy of this policy.

Residents still questioning library materials may state their opinion in writing on the Request for Reconsideration of Library Material form (Appendix D). The Request for Reconsideration form will be referred to a Collection Review Committee, appointed by the Director. The Committee will consider whether the material meets the criteria of this policy and make a recommendation to the Director. Each complaint is taken seriously; the decision will be based solely upon whether the material is appropriately selected under the Selection Policy, not on the number of forms or petitions received.

The Director will reply to the individual in writing as soon as practical. If the individual is dissatisfied with the Review Committee’s decision or the Director’s written reply, that person may appeal the decision to the Board of Trustees by notifying the Director in writing. The Director will make the necessary arrangements to place the Request for Reconsideration on the agenda of a regularly scheduled Board meeting.

After receiving public testimony from the patron, other interested parties, and from the Director, the Board will decide whether or not library policies have been followed.
Once the Library Board of Trustees has taken formal action on a resident’s Request for Reconsideration of Library Materials, no further complaints will be considered by the Board for the same title. Residents who submit a Request for Reconsideration of Library Materials for a title that received formal Library Board review will be notified by the Director that the Board has previously reviewed the specific title and no further action will be considered.

If a patron charges that a particular item is not protected under the First Amendment of the United States Constitution or the Constitution of the State of Montana, the burden of proof rests with the complainant.

If a court having jurisdiction over Lewis & Clark Library decides that any material in the collection is unprotected by these constitutions, such material will be removed immediately. Material under court consideration will remain available to patrons until a final ruling is made.

Residents may also request materials that are part of MontanaLibrary2Go be reconsidered as part of the statewide collection. Due to the nature of the collection as statewide, individual libraries may not remove titles from the collection. All requests for reconsideration of titles in the MontanaLibrary2Go collection must go through the process outlined in the MontanaLibrary2Go Materials Selection Policy (Appendix E).

SECTION V: REMOVING MATERIALS

The Board of Trustees recognizes that weeding materials from the collection is an important part of maintaining the Library collection. The removal policy of the Library will consider the same factors as the selection policy and will incorporate the guidelines and procedures outlined in the CREW Manual available in the Collection Management area and supplemented by other weeding guidelines published by the Public Library Association. The best possible use will be made of materials removed from the collection. No materials will be removed because of controversy.

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Reviewed and amended by the Board of Trustees June 8, 1999
Reviewed and amended by the Board of Trustees April 14, 1994
Adopted by the Board of Trustees January 17, 1978
Guidelines for Purchasing

Books - Fiction, Childrens, YA, Graphic Novels (all home locations)

Buy:
- If available from Ingram or Amazon, especially with regular discount
- If under $35

Don’t buy: Self-publications
Consult with collection manager: If over $35, but of potentially high interest

Books - Nonfiction:

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<th>Buy if 2+ are true</th>
<th>Caution</th>
<th>Don’t buy</th>
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<tr>
<td>• Published in last 5 years</td>
<td>• University presses</td>
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<tr>
<td>• Under $35</td>
<td>• Obscure/niche topics</td>
<td>• Self-published</td>
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<tr>
<td>• Popular topic, such as:</td>
<td>• Not regular discount</td>
<td>o CreateSpace</td>
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<tr>
<td>o Cooking</td>
<td>In these cases, use your judgment; consider attractiveness, topic, price.</td>
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<td>o Health/wellbeing</td>
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<td>o Print-On-Demand</td>
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<td>o Crafts</td>
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<td>o XLibris</td>
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<tr>
<td>• Modern classics</td>
<td></td>
<td>• Exception: Montana history</td>
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<tr>
<td>o Many positive reviews, esp. professional ones (Booklist, Library Journal)</td>
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<tr>
<td>o Award winner</td>
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Audiobooks (all)

Buy: If available from Ingram or Midwest for $75 or less. Unabridged only.

Music, DVDs:

Buy: If available from Midwest Tape for $40 or less.
Exception: TV series may exceed $40

Forward to Kim: *
- Nonfiction less than 3 years old and not on Midwest Tape
- Anything over $40
- Multiple seasons of a TV series (if it looks potentially popular)

Tips for purchasing:
- If you are unsure of a purchase, consider whether other customers are likely to want it. If yes, buy. If no, don’t buy.
- If you are really stumped, consult the collection manager.
- If you notice trends, or single titles in an unowned series, please share with a collection manager. This helps with future purchasing decisions.
SELECTION BEST PRACTICES
AUGUST 2020

OBJECTIVE
In order to streamline the ordering process, and to stabilize receiving volume of new items, having some standard practices is useful. This document is intended to act as a guide for selectors, and some amount of variation is to be expected, based on personal preference.

GENERAL GUIDELINES
- Timeliness is key – build and submit carts regularly to prevent large shipments
- Organize carts – group like items together
- Maintain regular contact with vendor representatives regarding changes that might be needed
- Keep an eye on your budget – review budget report from CDT monthly, and adjust ordering accordingly
- Data is your friend – if you need to know something about your collection performance, popular titles, user demographics, just ask Collection Svcs. Staff.

VENDOR-PREPARED CARTS
Selectors should work with vendors to set up pre-populated carts (this is called First Look in B&T, Standing Orders in MWT).

Parameters for these carts can vary widely, but some factors that should be considered by selectors and vendors are:
- Publisher
- Reviews
- Quality of Review
- Popularity of title
  - Printed copies
  - Copies ordered
  - Copies in vendor inventory
- Total number of items in cart
- Publication date
  - Do not include items published >3 months in the future

Ultimately, these are a time-saving tool, so pre-prepared carts should be mostly ‘winners,’ and should not require significant reduction before ordering.

Carts should be scheduled for delivery every 2 weeks, to keep a steady flow of orders.

ADDITIONAL CARTS
Selectors should have some method of keeping track of purchase suggestions, and should order those items regularly.

Selectors should also proactively pay attention to their collections, being mindful of
- Series completeness – esp. firsts in series
- Back catalog of popular authors
- ‘Classic’ titles, authors
- Popular book club selections

PREPARING CARTS FOR ORDERING
- Items should be grouped in carts by Holding Code – a list of Holding Codes is in the Collection Services Folder
  - If in doubt, simply group like items together – small carts are not a problem!
- If ordering >1 copy, include quantity in ‘Notes’ field
- If item should be held for a customer, include User ID in ‘Notes’ field
- Completed carts should be transferred to Collection Services staff to place order

ORDERING FREQUENCY
- Selectors are encouraged to send completed carts on the 2nd and/or 4th Thursdays of the month
STANDING ORDERS

- Standing orders can be set up through B&T and MWT.
- Generally speaking, Standing orders are intended to be a time-saving measure, and should include items that are 'automatic-buys,' and require minimal review by selectors.
- Standing order guidelines should be discussed with Collection Development, but in general, criteria for inclusion are:
  - Popularity of Author
  - Popularity of Series
  - Sales rank (MWT)
  - Publication Date
  - Publisher
- Format should be considered when creating or editing SOs.
  - For example: Hardcover is preferred over paperback; DVD is preferable over BluRay.