

Inforum Collection Development Policy

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Approved by the Information Services Committee on December 12, 2014

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Definitions

The definitions below are adapted from *ODLIS, the Online Dictionary for Library and Information Science* (<http://www.abc-clio.com/ODLIS/searchODLIS.aspx>).

Back issue. Any issue of a journal or magazine that precedes the current issue.

Bibliographic resource. Any item, whether tangible (such as print) or intangible (such as digital works), that is described in a library catalogue record.

Central library. The group of libraries within the University of Toronto Libraries system that ultimately take their directions from the University's Chief Librarian. The central library includes Robarts, Gerstein, Engineering & Computer Science, OISE Library, East Asian Library, Map & Data Library, Thomas Fisher Rare Book Library, and Dentistry Library. The central library excludes the libraries of the federated colleges, Victoria College, St. Michael's College, and Trinity College. It also excludes some Faculty libraries, such as the Music Library and the Inforum.

Deaccession. The process of removing items permanently from a library collection after careful consideration, and the deletion of the records associated with those items. Similar terms: weeding, withdrawal.

Embargo. The period during which the articles published in a journal or magazine are not available in online full-text. The period may vary depending on the publisher.

Gifts in kind. Non-cash gifts or gifts of property. Usually books, journals, archival material, or memorabilia. (<http://www.cra-arc.gc.ca/chrts-gvng/chrts/glssry-eng.html#giftinkind>)

Holdings. The stock of items owned by the library. May refer more specifically to copies, volumes, issues, or parts of an item. Sometimes used synonymously with the term library collection.

Open access. A publishing model in which the content published is made freely and universally available through the Internet.

Open stacks. Unrestricted access to the library shelves for users.

Perpetual access. Continued access to the digital content that the library has previously subscribed to, even after it has cancelled its subscription.

Print-on-demand. Publications that are printed one at a time after a request for printing is received.

Publications. Used in this document to refer to any works issued by a publisher, whether in print, digital, or other physical formats.

Realia. Any three-dimensional object from real life that may be made by humans, or come from nature.

Subject area.

Mission of the Inforum Collection

Information Services is one of the pillars of the Faculty of Information, the iSchool at the University of Toronto. It is an integral part of a community that “engage[s] in critical information research that supports the evolution of a global knowledge society of benefit to all of humanity” (Faculty of Information, 2013, p. 4). Through its many services--including instruction, course support, reference and research, technology support, information collection and access, and student mentorship--provided by a dedicated team of librarians, library technicians, and information technology staff, Information Services is woven into the fabric of academic, research, and professional life at the iSchool.

The Inforum collection is one of the many resources that Information Services provides to the iSchool community.

Information Services derives its mission from the iSchool. The *Pathways to Our Future: iSchool at University of Toronto Strategic Plan 2012-2017*, outlines the iSchool's 5 priorities:

- **Innovate:** Lead in innovative scholarship to transform society and scholarship.
- **Inspire:** Enhance our international renown for life-long, enquiry-centered education.
- **Shape:** Shape the social space of information and support sustainable growth.
- **Lead:** Nurture leaders who contribute to enabling society to realize the positive social benefits that information makes possible.
- **Enrich:** Enrich our environment and culture for study, research, and work (p. 9).

The goal of the Inforum collection is to serve as an information and reference resource for “the next generation of academic and professional leaders in information, who join [the iSchool] in transforming society through collaboration, innovation, and knowledge creation” (Faculty of Information, 2013, p. 4). The collection serves as an entryway to the rich array of academic, research, and professional bibliographic resources about information and cultural heritage policies that are not readily available through open access means. As a guiding principle that stems directly from the iSchool's mission statement (p. 4), Information Services has a social responsibility to encourage the dissemination of knowledge for the benefit of society; Information Services is therefore committed to making the current literature of the Inforum collection publicly accessible through open stacks.

In the context of this document, the iSchool community is defined as:

- iSchool faculty and students, who rely on the collection for curricular activities and research;
- Academic, as well as administrative staff within the iSchool and the University of Toronto, who rely on the information and professional knowledge contained within the Inforum collection in order to carry out their work and fulfill their professional responsibilities;
- Alumni, who rely on access to the collection to deepen their professional knowledge and support their career development;
- Members of the public, particularly visiting scholars and practitioners working within the information and cultural heritage sectors, who seek specialized information on information and cultural heritage work, but who lack access to a comparable collection anywhere else. Access to the Inforum collection may be through on-site visits or interlibrary loan services.

The Inforum collection is a living collection that reflects the changes in the iSchool's curricula, changes within the information and museum studies disciplines, and changes in the associated professions. The purpose of this collection development policy is to provide general guidance on collecting activities, but not to limit new potentials that may be identified in the future by the iSchool community.

Subject Coverage

The Inforum collection is the only library collection within the University of Toronto Libraries (UTL) and in Canada to focus on the scholarly and professional literature of information and museum studies. The Inforum collection is especially strong for its holdings of professional literature.

The Inforum collection forms part of the wider UTL collection, which *as a whole* forms a research level library collection. While academic and research libraries commonly refer to the Conspectus methodology (IFLA 2001) as a guideline for collection development, this model is designed primarily for libraries with a broad collecting mandate, rather than a highly specialized one. The interdisciplinarity, multidisciplinary, specialization, and professional awareness of the iSchool's academic programs has meant that the collection residing within the Inforum space must necessarily be more selective in scope than the rest of the UTL.

Formal and ongoing consultations with members of the iSchool community support the continued development of the Inforum collection according to selection criteria informed by the following requirements:

- The teaching and study activities at the iSchool;
- Doctoral- and Master-level research activities at the iSchool;
- The extent to which iSchool faculty research topics are covered by other UTL locations;
- The availability of scholarly or professional material on iSchool research topics from libraries outside of the UTL system, through interlibrary loan services, neighbouring public library systems, and open access collections;
- The availability of professional literature on information and cultural heritage topics outside of the Inforum collection.

Relationship with Other U of T Libraries

Although the Inforum is a campus library that reports administratively to the Faculty of Information, the source of the Inforum collection budget is the central library, and the Inforum collection is catalogued in the union catalogue shared by all UTLs and affiliated research hospital libraries (www.library.utoronto.ca). As such, the Inforum collection is part of the larger UTL research collection, and the iSchool acts as the steward of the Inforum collection.

For the purpose of cooperative collection development, the Inforum collection focuses most intensely on the subjects within information, museum, and cultural heritage studies that are not heavily collected by other UTL locations. For subjects that are comprehensively collected by other UTL locations, the Inforum holdings will supplement those collections by acquiring the works that fulfill iSchool course support needs.

“Subject area” is a term loosely used in this document to convey a general sense of the content collected as a whole at the iSchool. Each subject area referred to in this document has interdisciplinary and multidisciplinary qualities, though the choice of terms applied to each subject area (for the sake of documentation) corresponds to names of degree programs, program

concentrations, collaborative programs, or themes that spans across more than one concentration or program. The subject areas listed below serve as a guideline for current collection activities, but in no way restricts the collection from growing or focusing on new subject areas.

Subject Areas Collected (including programs, concentrations, themes)	Relationship with Other UTL Collections
Administration	The iSchool relies on the Rotman Business Information Centre to collect general works on business administration. The Inforum collection focuses selectively on works about administration, management, and organizational culture in information and cultural heritage sectors.
Archives and Records Management	The iSchool collects broadly and deeply in these areas. The Inforum collection is the main UTL collection covering the study of archives and records management. The Inforum collection also holds works on related themes, such as digital preservation and digital curation.
Book History and Print Culture	Robarts and St. Michael's College (Kelly Library) have well developed collections in this area. The Inforum collection holdings in this area supplement those other library collections.
Communication and Media Studies	Robarts, Kelly Library, and the University of Toronto Mississauga (UTM) Library collect heavily in this area. The Inforum collection holdings in this area supplement those other library collections.
Copyright and Scholarly Communication	Robarts collects works about scholarly communication, while the Faculty of Law (Bora Laskin Library) collects extensively on copyright. The Inforum collection holdings in these areas focus on these themes as they apply to the information and cultural heritage sectors.
Culture and Technology	The Inforum collection focuses on the social, societal and cultural aspects of information technology. It complements the holdings at Robarts, Kelly Library, and UTM Library. Related themes that the Inforum collection supplements include children, youth and digital culture; and new media and technology.
Data Mining, Data Management	The Engineering & Computer Science Library collects many of the technical works published in this area. The

Subject Areas Collected (including programs, concentrations, themes)	Relationship with Other UTL Collections
	Inforum collection focuses on the social, societal and cultural aspects of data mining, data management, big data, and data curation.
Gender and Sexual Diversity	The New College Library collects extensively in these disciplines. The Inforum collection holds works about gender and sexual diversity studies as they intersect with the study of information, communication, technology and cultural heritage.
Health Informatics	Gerstein Library collects extensively in this area. The Inforum collection supplements Gerstein Library's holdings.
Human-Computer Interaction	The Engineering & Computer Science Library collects technical works published in this area. The Inforum collection focuses on the social, societal and cultural aspects of area.
Identity, Privacy, and Security	The Inforum collection holds works about identity, privacy, surveillance, and security as they intersect with the information and cultural heritage sectors.
Information Policy	The Inforum collection holds critical works on many aspects of information policy.
Information Systems and Design	The Engineering & Computer Science Library collects the more technical works published in this area. The Inforum collection focuses on the social, societal and cultural aspects of this area.
Knowledge Management	The Inforum collection supplements the collections at Robarts and the Rotman Business Information Centre, with the Inforum collection focused more particularly on works about the creation, organization, sharing, and utilization of information and knowledge.
Knowledge Media Design	The Inforum collection supplements the collections at Robarts, Kelly Library, and UTM Library.
Legal Issues in Information/	The Inforum collection supplements the collections at

Subject Areas Collected (including programs, concentrations, themes)	Relationship with Other UTL Collections
Museum/ Cultural Heritage Studies	the Law Library and Robarts, with the Inforum collection focused particularly on legal issues that apply to the information and cultural heritage sectors.
Library and Information Science	The iSchool collects broadly and deeply in these areas. The Inforum collection is the main UTL collection covering the study of libraries and information science. The Inforum collection also holds works on related themes, such as metadata, classification, knowledge organization, and digitization.
Museum Studies	The iSchool collects broadly and deeply, except for pre-2006 works, which are collected by the ROM Library. (Note: iSchool faculty and students have ROM Library privileges.)
Philosophy of Information	The Inforum collection supplements the collections held across the UTL system.
Research Methods	The Inforum collection supplements the collections on research methodologies collected by other UTL locations. The Inforum collection in this area reflect course support needs as well as research methods that derive from, or are used in, the information and cultural heritage sectors.

Scope of Coverage

Languages Collected

As English is the predominant language used for research and study at the iSchool, the Inforum collection primarily collects works published in English. The Inforum will also collect works published in other languages if they represent a topic or a distinct perspective on a topic that is not extensively covered by English-language works already found within the Inforum collection.

Due to on-site space limitations, whenever possible, and without inconveniencing iSchool courses that are underway, non-English language material will be sent to the UTL's off-site storage facility at Downsview. Metadata describing the items sent to Downsview will continue to be searchable through the UTL catalogue, and users with an active T-card can continue to borrow items from Downsview by submitting their requests through the UTL catalogue.

Members of the public who wish to consult an Inforum collection item housed at Downsview should contact Loan Services at Robarts Library.

Geographical Areas Covered

Due to the global nature of the Faculty's mission, the Inforum strives to collect subject-relevant publications that represent the perspective and experiences unique to other continents of the world whenever a legal copy of such a publication can be obtained through purchase or subscription.

Chronological Periods Covered

As a living collection, the Inforum collection must constantly develop by acquiring the latest works in each subject area covered by this document. When funds for retrospective collection development are available, efforts may be made to acquire publications contemporary to historical periods. The only exception to this guideline is Museum Studies literature published before 2006; for such material, the Inforum defers to the ROM Library and Robarts for retrospective research material.

Description of Collections

General Collection

The general collection consists of monographs, international and national standards, collected papers, reports, statistics, classified annuals, and grey literature in the subject areas of the Inforum collection. Whenever the infrastructure is available, and copyright, course support, cost, and retention considerations are met, the Inforum will strive to obtain access to the online version of publications. Selection of new works, whether performed in-house or by a third party (e.g., through approval plans), will continue to be monitored by a collections librarian working closely with the Faculty of Information.

As the Inforum collection is catalogued within the UTL union catalogue, all descriptive cataloguing practices related to the Inforum collection, whether performed in-house or by a third party, follow national and international standards adopted by the UTL. The Inforum collection is one of two UTL collections classified according to the latest edition of the internationally recognized Dewey Decimal Classification system. For the subarrangement of items within the same classification number, and to ensure that each work is assigned a unique call number, the Inforum collection uses the Cutter-Sanborn Three-Figure Table.

Periodicals

Selection of Journals

Many of the journals that faculty, staff, and students at the iSchool expect to access are increasingly available as online e-journals subscribed centrally by UTL. Where journal content is available through a central library e-journal subscription, the Inforum will not duplicate the subscription, either in e- or print formats. Where the journal content falls within a core subject

area of the Inforum collection, but is unavailable as an e-journal through the central library, the Inforum will endeavour to obtain a subscription for the iSchool.

Journal Formats

Where a stable online e-journal format is available, the Inforum will privilege obtaining an institutional subscription to the e-journal format over the print format, provided that the e-journal is offered on a platform that offers stable, across-the-board, institutional-level access to that content, and the content coverage is equivalent to, or better than, that offered by the print format.

Information Services will only provide access to new e-journal content in the following situations:

- There is no embargo on recent issues of the e-journal.
- The publisher can provide the content either through automatic IP validation or through a single public login that is distinct and separate from a staff login.
- Where a single login is required, the platform protects confidential information regarding the institution, including, but not limited to, staff, user, and financial information.

Where an e-journal is unavailable under the above terms, the Inforum will subscribe to the print format. The Inforum will give special consideration to the print format of a journal if the journal is published primarily to be browsed, or contains significant amount of supplementary content that is used for research and study, but is not reproduced or easily searchable in the online format.

Retention of Back Issues

Where funds allow and access to the content is deemed necessary for iSchool research, scholarship, and teaching, perpetual access rights to online journal back issues not covered by a current subscription will be acquired separately.

Print journal back issues will be retained on-site if they bridge gaps in access to the online e-journal. Print journal back issues that duplicate online e-journal archives will be considered for transfer to the University of Toronto Libraries' off-site storage facility at Downsview.

Limitations

Information Services will not provide access to journal content that can only be provided by staff on a special "print-on-demand" basis.

Information Services will continue to monitor the publishing and scholarly communication landscape as they evolve, and modify or reinstate subscriptions as necessary to support the academic mission of the Faculty.

Reference Resources

Where an online version of a reference resource is available, and the online version is an enhancement of the print version (for instance, the online version is regularly updated, unlike the print version), the Inforum will strive to acquire access to the online version of the reference resource. Print copies that the Inforum holds, that duplicate the online version, will be considered

for off-site storage at Downsview, in consultation with the reference librarian and instructors of relevant iSchool courses.

Types of reference resources that the Inforum considers for acquisition or subscription include: abstracts and indexes, bibliographies of reference resources, encyclopedias, subject specific dictionaries/glossaries, manuals, handbooks, metadata and classification schemas, and standards produced by national and international bodies.

The Reference collection may be weeded from time to time, as information is updated, new modes of access become available, or space is required for the addition of new material. Weeding of the reference collection will be carried out in consultation with the collections librarian and the reference librarian.

Digital Collections

Information Services acquires access to digital and online resources in the subject areas of the Inforum collection when the following factors are met:

- Access is not yet offered centrally by UTL through the UTL digital collections
- Access will enhance the learning, teaching, and research activities at the iSchool
- The format of the digital resource is one that can be covered by the collections budget
- Access to the digital collections is provided either through IP recognition, or content can be loaded locally to UTL servers
- Access to the content is perpetual

Information Services also collaborates with other UTL locations on the joint acquisition of digital and online resources.

Collections in Other Formats

The Inforum collects the following non-print information resources sparingly. When required to support an iSchool course or research project, the Inforum will collect the following resources:

- Current AV media
- Realia and 3D material, such as toys and kits
- Data files
- Children's books. Due to the breadth and strength of OISE Library's Children's Collection and the Toronto Public Library, Lillian H. Smith branch's Osborne Collection, the Inforum collection retains only a highly selective children's book collection, with a focus primarily on books about information and cultural heritage organizations, selected classics for early to teen readers, and books that demonstrate special publishing or binding techniques.

Due to preservation needs, the Inforum no longer actively collects items published in microtext formats (e.g., microfiches, microcard, and microfilm). Those microtext formats that continue to be in the Inforum's possession will be retained until the time when an environmentally stable storage site within the UTL system can be identified for permanent housing of the material.

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Consideration will be given to ensuring that the new home allows the material to remain discoverable and available to UTL users upon request.

Course Reserves

The course reserves collection is a living collection that changes from term to term, to reflect the specific reading requirements of current iSchool courses. Items within the course reserves collection are drawn from collections within the Inforum.

Theses & Dissertations

Faculty Member Dissertations

The diversity of subject expertise held by iSchool faculty reflect the breadth of the information and museum disciplines, as well as offer opportunities for enriching, synergistic knowledge generation. To this end, whenever possible, the Inforum collects one copy of each doctoral dissertation produced by regular iSchool faculty members, when such dissertations are unavailable through either an open access repository or a dissertation service to which the UTL subscribes.

iSchool Doctoral Dissertations and Masters' Theses

Since 2008, the University of Toronto, School of Graduate Studies has mandated that Doctoral dissertations and Masters' theses be deposited electronically on T-Space, the University's digital open access research repository, for long-term preservation and dissemination of university research. Due to this institutional-wide policy, the Inforum does not collect print copies of dissertations and theses completed at the iSchool from 2008 onwards.

For dissertations and theses completed at the iSchool prior to 2008, the Inforum collects two hard copies of each title, with one hard copy made available for circulation, and a Faculty archival copy going to the Special Collections. Until plans are in place for the retrospective digitization of pre-2008 dissertations and theses, the Inforum will continue to retain an archival copy of such papers in its collection.

iSchool Research Reports and Course Assignments

The only research reports that the Inforum collects are Master of Museum Studies research reports produced from 1972-2005, which were part of the degree requirement. The Inforum does not collect other research reports and course assignments for any of the iSchool's degree programs. Any research reports and course assignments donated to the Inforum that fall outside of the Master of Museum Studies research reports of 1972-2005 will be discarded.

Special Collections

General Special Collection

The general Special Collection contains items of historical value to information and museum studies. These items include: early editions of major classification schemes, rare publications,

fragile items, primary documents from pivotal moments in library history, ephemera and grey literature associated with the iSchool, and publications that demonstrate innovative, unusual, or expensive binding. Items from the general Special Collection are generally for in-house use only.

C. Donald Cook Collection on Bibliographic Control

The C. Donald Cook Collection on Bibliographic Control Collection (or the Cook Collection) is a special research collection that commemorates Professor Emeritus C. Donald Cook, who retired on June 30, 1989 after teaching for seventeen years at the Faculty of Library and Information Studies (now Faculty of Information) (Ex Libris, 1989). Prior to joining the Faculty, Cook held positions at the Council of Ontario Universities, Columbia University Libraries, and the United Nations Library at Geneva (Ex Libris, 1989). He was President of the ALA's Resources and Technical Services Division, Chairman of the ALA's Cataloging and Classification Section, head of the Technical Services Coordinating Group of the CLA, a member of the Standing Committee of IFLA, and founding editor of *Cataloging and Classification Quarterly* (Ex Libris, 1989).

The Cook Collection captures Cook's professional and teaching contributions to the topics of cataloguing and classification. The core collection consists of books about cataloguing and classification, either written or owned by Cook, along with working papers related to his committee work, and copies of various standards and classification schemes.

Additional works have gradually been added to the Cook Collection, with the intent of representing the breadth of Cook's professional and teaching interest without replicating the holdings of the Inforum's general and SAS collections.

Items found within the original Cook Collection (2010):

- Works published by Cook
- Works owned by Cook (e.g., items marked with his name stamp or his signature)
- One copy of each revision of the following standards, if the revision was already available in the Inforum general or SAS collections and published on or before 1989:
 - Anglo-American Cataloguing Rules
 - Cataloguing standards specific to Canada
 - Dewey Decimal Classification – Summaries only
 - IFLA standards on bibliographic description (e.g., ISBD)
 - Library of Congress Classification schedules and interpretations
 - Library of Congress Rule Interpretations
 - MARC bibliographic formats, including geographically specific versions of MARC (e.g., CANMARC)
 - Subject cataloging manuals

Currently, additions to the collection consist of gifts-in-kind. If funds and space become available in the future to expand the Cook Collection, selection decisions should reflect Cook's contributions to the LIS field, rather than duplicate the Inforum's general and SAS collections, or the Inforum's holdings at Downsview, the UTL's offsite storage facility.

Criteria for future additions to the Cook Collection:

- Works written/compiled/edited by Cook
- Copies of other works owned by Cook (marked with his name stamp or his signature)
- Standards related to descriptive and subject cataloguing *if published in OR before 1989*

Due to the subject coverage of the Cook Collection, most, if not all, works added will fall within the 025.3-025.4 range of the Dewey Decimal Classification system. A specially designed bookplate has been developed to mark each Cook Collection item.

Items in the Cook Collection are fully catalogued; records are searchable in the UTL catalogue at www.library.utoronto.ca. The Cook Collection can be browsed by appointment. Individual items from the collection can be brought up to the Inforum for in-house use, but should not be removed from the Inforum without special permission. Details regarding storage retrieval will be updated from time to time on the iSchool website.

Subject Analysis Systems (SAS) Collection

The SAS collection is a historical collection of classification schemes, subject heading lists, thesauri and taxonomies across multiple disciplines, not only information studies.

History of the SAS Collection

The Special Libraries Association began the collection in 1924, in order to fill the gaps in indexing terms that the Library of Congress Subject Headings did not yet cover. The collection moved to the Bibliographic Systems Center at the School of Library Science at Case Western Reserve University, before arriving at the University of Toronto, Faculty of Library Science in 1976 as the Subject Analysis Systems collection. The collection was cited in ANSI/NISO Z.39.19-1993 and ANSI/NISO Z39.19-2003 as the international clearinghouse for subject analysis materials published in English, as well as acknowledged in handbooks on thesaurus construction such as Aitchison, Gilchrist and Bawden's *Thesaurus construction and use: A practical manual*, 4th edition (2002).

Taken as a whole, the collection represents the rich history of subject analysis and classification theory, while reflecting the socio-political shifts in thinking about the organization of information within a variety of disciplines.

Accessing the SAS collection

Items in the SAS collection appear in the UTL catalogue under the library "Faculty of Information (Inforum)" with the library location "Subject Analysis Systems". Many of the items in the SAS collection can be borrowed.

Out of consideration for shelf space as well as to retain a permanent collection that is unique:

- Each edition of a title in the SAS collection will be retained. However, only 1 copy (i.e., the best copy) of each edition will be retained.
- Only the most recent edition of a title will be kept on site, in the SAS stacks of the Inforum. The best copy of earlier editions will be transferred to off-site storage at Downsview, with the later edition retained on site.

- Downsview only accepts 1 copy per edition; therefore, extra copies not kept on-site at the Inforum, and that duplicate a copy already at Downsview, will be discarded.

Dissemination of Historical Materials Found in the Collections

As a living collection that has been meticulously built over the lifetime of the Faculty, the Inforum collection reflects not only Faculty history, but also decades of change and development in information and cultural heritage education in Canada. The iSchool believes that the collection contains rich resources for historical research that are meant to be shared with the broader information and cultural heritage communities, whether through exhibitions, joint digitization efforts, collaborative research, or other forms of information dissemination.

Intellectual Freedom

The decision to select a work for the Inforum collection is informed by the belief that the broadest range of intellectual and professional activity is best served through access to multiple viewpoints and expressions of knowledge, regardless of the extent to which these are accepted by the general public. To the limit of staff abilities, the Inforum collection is developed to represent as many perspectives as possible within the subject areas covered. No works added to the collection will be withdrawn on the basis of individual or group complaints that the works are misinformed, inappropriate, or offensive.

Preservation

Retention of the Collection

With the exception of copies that duplicate holdings available elsewhere within the University of Toronto, all works added to the Inforum collections will be added with the aim of permanent retention, either on site at the Faculty, or off-site at Downsview.

When warranted, items from the collections will be repaired in-house or sent to an external source for repair after an in-house assessment of their condition has been performed. If an item cannot be repaired at this time due to technological barrier, but the work contained within it is unique to the University and considered of research or heritage value, the item will either (1) be removed from circulation, but retained until a future time when new preservation methods become available; or (2) offered to another academic or research institution with the capability of providing the appropriate long-term storage environment for the item.

Off-site Storage (Downsview)

As a living collection, new works are continually added to the Inforum collection. To make space for new works, low circulating items from the general collection will be periodically transferred to off-site storage at Downsview. The transfer criteria will be set by the collections librarian on the basis of existing circumstances, and in consultation with Downsview staff and

affected students, staff, or faculty. A continual weeding process will occur on an annual or biennial basis as demanded by space constraints; however, the ultimate determination of the frequency of weeding will be dependent on Downsview space, available staffing, and Faculty priorities.

Weeding Policy

Permanent De-Accessioning Guidelines

As a practice, unique works are rarely de-accessioned from the Inforum collection, with the transfer of low circulation works to off-site storage being the preferred method of responding to space constraints.

In the rare case that a work is being considered for permanent de-accession from the collection, the following criteria will be used:

- The work was acquired expressly for temporary use to support the curriculum, and that demand for the work has now expired.
- Staff has learned that the copy of the work at hand is not a legally obtained copy.
- The work contains information and perspectives that are well covered by other works retained within the collection, and it adds no significant historical or cultural contribution to knowledge in the subject area that it covers.
- The copy is not a special collections copy.
- The copy is in a poor, unstable physical condition, and the cost of repairing, replacing, or housing it far exceeds the value of the copy.

Duplicate copies of works held within the Inforum or within the broader University of Toronto Libraries system will be de-accessioned when they are no longer required for course support or for retention within any of the special collections.

Disposition of De-Accessioned Material

The Faculty of Information reserves the right to dispose of de-accessioned material through a variety of means, including, but not limited to donation to charitable organizations, book swaps, student groups, and any interested individuals.

Gifts Policy

Gifts-in-kind

Gifts-in-kind (that is, donations of unique books, journals, and other publications, covering the subject areas of the Inforum collection) are often appreciated. Donations received by the iSchool become the property of the university, and the iSchool reserves the right to accept or refuse the addition of those donations to the Inforum collection.

Acceptance guidelines:

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- Items must fall within the subject scope of the Inforum collection
- Items should not duplicate existing items in the collection
- Items should be in good physical condition, requiring minimal processing and maintenance costs

Unwanted donations will be disposed of in accordance with the most current collection management practices.

Potential donors who wish to give to the Inforum collection should contact the iSchool collections librarian prior to sending any material.

All donors are required, at their own expense:

- To produce a detailed list of their prospective gifts-in-kind;
- To arrange and pay for the shipment of the gifts-in-kind; and
- To complete and submit a *Deed of Gift* at the time of donation, acknowledging that the iSchool shall be entitled to administer, dispose of, or return any part(s) of the gifts-in-kind without restrictions, in accordance with generally accepted principles and practices of collection management, regardless of whether or not the donor requests a tax receipt.

Tax Receipts

Donations to the iSchool are considered charitable donations and may be eligible for tax receipts subject to Canada Revenue Agency regulations. If requested to do so, gifts-in-kind that are accepted into the Inforum collection will be evaluated for income tax purposes. The valuation will reflect the fair market value of the items retained. Tax receipts will not be issued for gifts that have a fair market value of less than \$500.00. Tax receipts are issued by the University of Toronto's Department of University Advancement.

For major gifts-in-kind with a fair market value of \$1000 or more, the Faculty of Information reserves the right to bill the donor for the cost of obtaining an independent third-party appraisal.

See Appendix 1 for a sample *Deed of Gift*.

Monetary Gifts

Monetary gifts to the Inforum collection are welcome and appreciated. Donors who wish to donate monetary gifts to the Inforum collection are encouraged to contact the iSchool's Senior Development Officer.

Periodic Evaluation of the Collection and the Collection Development Policy

This collection development policy document has been drafted to reflect the reality that the iSchool's scholarly and research activities, as well as the needs of the broader iSchool community, are in continual development and renewal. This document does not restrict the

Inforum Collection Development Policy, approved by ISC on December 12, 2014

collection from expanding into new areas of study and professional practice, nor limit future cooperation or partnerships with other collecting organizations that are endorsed by the Information Services Committee and Faculty Council.

Bibliography

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Appendix 1: Deed of Gift

Be it known that I, _____ (donor's name), of _____ (city of residence) do hereby give and deliver to the Faculty of Information at the University of Toronto absolutely and unconditionally the following property:

Gift Description: _____
(Attach lists as necessary)

to be the sole and exclusive property of the University of Toronto. I am the sole owner of the property to be gifted; it is free from debt or lien, and I formally request the University of Toronto to accept the gift. I recognize and acknowledge that the University of Toronto shall be entitled to administer, dispose of, and/or return any part(s) of the above-described property without restrictions, in accordance with generally accepted principles and practices of collection management.

Donor's Signature: _____ Date: _____

Name and Address (printed):

Phone/email/fax:

Request for Tax Receipt*

*Fill out the following portion only if a tax receipt is requested.

I understand that tax receipts are issued by the Department of University Advancement (DUA) only for gifts added to the Faculty of Information collections. The DUA determines the value of the gift based on Canada Revenue Agency's guidelines on valuation. Based on these guidelines, the donor's tax receipt will be limited to the lesser of the donor's cost of property or the fair market value of the property if the:

Property was acquired as part of a tax shelter (a situation in which the donor may profit by making the gift)

Property was acquired in the last 3 years (unless the gift is a bequest to the University of Toronto)

Property was acquired in the last 10 years (unless the gift is a bequest to University of Toronto) with the intent to donate the property to charity.

I have owned this property for three or more years: Yes () or No ()

If **no**: What was the cost to you to acquire the property?

Was the property acquired as a gift/inheritance? If so, please confirm a fair market value for the property as of the date you acquired it:

Did you acquire the property within the last ten years with the intent to donate it? Yes () or No ()

If **yes**: What was the cost to you to acquire the property?

Was the property acquired as a gift/inheritance? If so, please confirm a fair market value for the property as of the date you acquired it:

Signed at _____ (city) on _____
(date)

Donor's Signature _____

Please print donor's name: _____

Acceptance and eligibility of this gift for a charitable tax receipt is subject to approval by the DUA on behalf of the University of Toronto. Attach this entire form to the DUA's Gift-In-Kind (Non-monetary Gift) Processing Form.

Appendix 2: Personnel

Personnel identified in this policy and their corresponding incumbent:

Position named in this policy	Name of incumbent	Job Title (as at December 12, 2014)
Collections librarian	Elisa Sze	Librarian (Collections & Public Services Coordinator)
Senior Development Officer	Robin Kester	Senior Development Officer
Reference librarian	Nalini Singh	Librarian (Reference Services Coordinator)

Appendix 3: Consultations Undertaken

Consultations have ranged from one-on-one meetings to group meetings. Initial consultations with faculty members and student representatives were structured around early drafts of the collection development policy document. Later consultations varied between general questions about the collection and current collection projects, to more specific questions about collection use, collection needs vis-à-vis teaching and study, strengths, professional and career requirements, and opportunities for future development. The latest draft of the collection development policy is an attempt to incorporate the feedback received through the consultation process.

Individuals consulted:

- Siobhan Stevenson (LIS faculty), Friday, March 14, 2014
- Matt Ratto (CIPS, C&T faculty), Monday, March 17, 2014
- Eric Yu (ISD, KMIM, KMD faculty), Tuesday, March 18, 2014
- Jenna Hartel (LIS faculty), Wednesday, March 19, 2014
- Leslie Shade (PhD director; C&T, CIPS faculty), Wednesday, March 19, 2014
- IS Committee Student Representatives, Thursday, March 27, 2014
 - Christie Oh (1st year PhD candidate, health information)
 - Paul Weitzmann (1st year MI candidate, CIPS, ISD)
 - Nora Venezky (2nd year MMSt candidate)
- Heather MacNeil & Fiorella Foscarini (ARM faculty), Monday, March 31, 2014
- Cara Krmpotich (MMSt faculty), Friday, April 4, 2014
- Costis Dallas (MMSt director), Thursday, April 17, 2014
- Seamus Ross (Dean & Professor), Wednesday, June 4, 2014

Other consultations:

- FIAA Executives, Wednesday, April 16, 2014
- Draft sent to all collaborative program liaisons by email

A number of individuals have also submitted written comments to the general questions about use of the collection, collection strengths, and areas for further development, outside of the consultation meetings:

- Written responses from iSchool PhD students
- Written responses from alumni (either through email or facebook)
- Written acknowledgements of receipt of the draft from several collaborative program liaisons
- Written response to the draft from the Museum Studies Student Association

The Senior Development Officer was also consulted on the “Gifts Policy” section of this document, Tuesday, April 22, 2014. The central library’s Gifts Policy formed the initial basis of this section.

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Drafts of this policy were presented and discussed at the following Information Services Committee meetings:

- February 13, 2014
- May 8, 2014
- June 5, 2014
- December 12, 2014

Information Services Committee members provided feedback on the drafts both within and outside of committee meetings.