already provided, what future development of collections is planned, and what collaborative agreements already exist or are possible.

5. Based on previous research and communication, determine the scope of the Collection and the range of its associated services (both onsite and remote), while considering additional factors like available space, personnel, budget, and future growth.

The acquisition of print and digital genealogy and local history materials, as well as their cataloging/processing, should receive the same priority as other library materials. In preparation for the ongoing development and maintenance of the Collection, the librarian should develop appropriate policies to govern collection activities.

1.

document.

- 2. The policy should be specific to the Collection, establishing geographic and demographic scopes, as well as the qualities and formats of materials being collected.
- 3. As part of the acquisitions policy, identify the types of materials that will not be collected, such as those that are outside the geographic scope of the collection, or material formats or conditions that are better preserved by other institutions.
- 4. As part of the acquisitions policy, identify the subject areas for materials that may be acquired as part of a cooperative agreement with other institutions.
- 5. Develop a policy regarding acceptance of gifts and bequests and their incorporation into the collection. This should include a -style form that addresses physical and intellectual/usage rights.
- 6. A rights permission statement is needed for digital acquisitions.
- 7. Incorporate a policy under which materials may be de-accessioned from the collection.

The librarian should identify the range of services that will be provided to genealogy and local history patrons, both onsite and remotely:

- 1. User services should include, but not be limited to:
 - a. Assisting and instructing patrons to determine what research materials they need.
 - b. Evaluating the significance and validity of various types of information.
 - c. Providing interpretation or contextualization of materials in their collections.
 - d. Locating research materials through print and digital data sources/services.
 - e. Orculation through interlibrary loan, when possible and appropriate.
- 2. The librarian should refer patrons to other known libraries, institutions, agencies, and archives that may have materials applicable to their research.
- 3.

service should include assistance for genealogy and local history patrons.

- 4. The library should have clear, written policies that explain and offer services.
 - a. These policies should be publicized on the library's website and by any other appropriate means.
 - b. They shou

- 1. Whenever possible genealogy and local history collections should be maintained by professional reference librarians, who may be assisted by paraprofessionals and by knowledgeable volunteers.
- 2. All reference librarians serving genealogy and local history patrons should be trained and periodically updated in genealogy and local research. This may include, but not be limited to, attendance at local, state, regional, and national genealogy, local history, or library conferences; seminars; workshops; webinars; or other types of meetings/courses where genealogy and local history research procedures are presented.
- 3. Reference librarians should be trained to assist patrons with evaluation, search techniques, and use of resources related to genealogy and local history research, including born-digital resources.
- 4. The collections and holdings of other genealogy and local history collections should be familiar to library staff, so they can provide appropriate referrals. These collections may include archives, government agencies, historical societies, other libraries, museums, etc.

The librarian should address issues relating to access to genealogy and local history materials:

- 1. The library should have a clear and visible access policy.
- 2. The physical Collection should be established in an identifiable, secure, and monitored place within the library.
 - a. Genealogy and local history collections held by the same library may be combined or separate from each other but should be distinct from main collections in most libraries.
 - b. Exceptions include special libraries and archives where the main collections are focused upon genealogy and/or local history.
- 3. The Collection should be fully cataloged, and additional tools for patrons--finding aids, research guides, bibliographies, etc.--should be created when appropriate. Metadata for digital collections should be created to meet or exceed established standards for providing access.
- 4. The Collection must include sufficient equipment and workspace.
- 5. Orculation policies for the Collection should be considered separately from general circulation policies and dearly stated to patrons. Genealogy and local history materials often are rare, fragile, or are in great demand locally as reference materials. When possible, however, they should circulate, including through interlibrary loan.

6.

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