



OHRAB Grant Final Report

Institution/Organization Name: Canal Fulton Public Library

Project Title: Canal Fulton Archives Preservation Needs Assessment

Project Director: Cathy Morgan

Director

330-854-4148

cathy@canalfultonlibrary.org

Summary of Project Activities and Accomplishments

Narrative of self-assessment about how the project met the objectives submitted in your application.

The Canal Fulton Public Library received an OHRAB Regrant to hire a consultant to advise us on the implantation of archival best practices through an assessment of the library's local history/genealogy program and to develop a phased strategic growth plan to preserve, organize, access, and promote the collections for use by the public. The plan also included a development strategy for partnering with the Canal Fulton Heritage Society, whose collections are similar in scope, mission, and vision, to share resources and amplify their impact on a local and regional level.

Consultant Katy Klettlinger from Lyrasis was hired and came to Canal Fulton on June 8th, 2023, and spent a full work day with David Brown (retiring library director), Cathy Morgan (new library director), and Rob Hodges (local history librarian). During this time, she toured the library and reviewed the local history program. She also toured the Canal Fulton Heritage Society (located within the historic Blank House), the Heritage House Museum, and the historic Oberlin House. In addition, she met with Dennis Thornton, a trustee of the Canal Fulton Heritage Society, and Ed Shuman, President of the Canal Fulton Heritage Society. On June 26th, she emailed her 19-page report to David, Cathy, and Rob for review. Within her report, she advised us on the implementation of archival best practices, assessed our current program, and provided a development strategy for partnering with the Canal Fulton Heritage Society, thereby fulfilling all of the goals of the project. We reviewed her report, and purchased and received archival supplies that she recommended for our program with the remaining budget. We are therefore at 100% completion for this project and have met the objectives submitted in our application.

Evaluation of the project's impact.

Our library team has reviewed Ms. Klettlinger's report, and has already begun taking steps to make her recommendations a reality. Our local history librarian Rob Hodges has been participating in various archival/local history/genealogy trainings for months now. He is continuing to inventory our collection, and is currently working on writing a collection development policy to provide a framework for the local history collection.

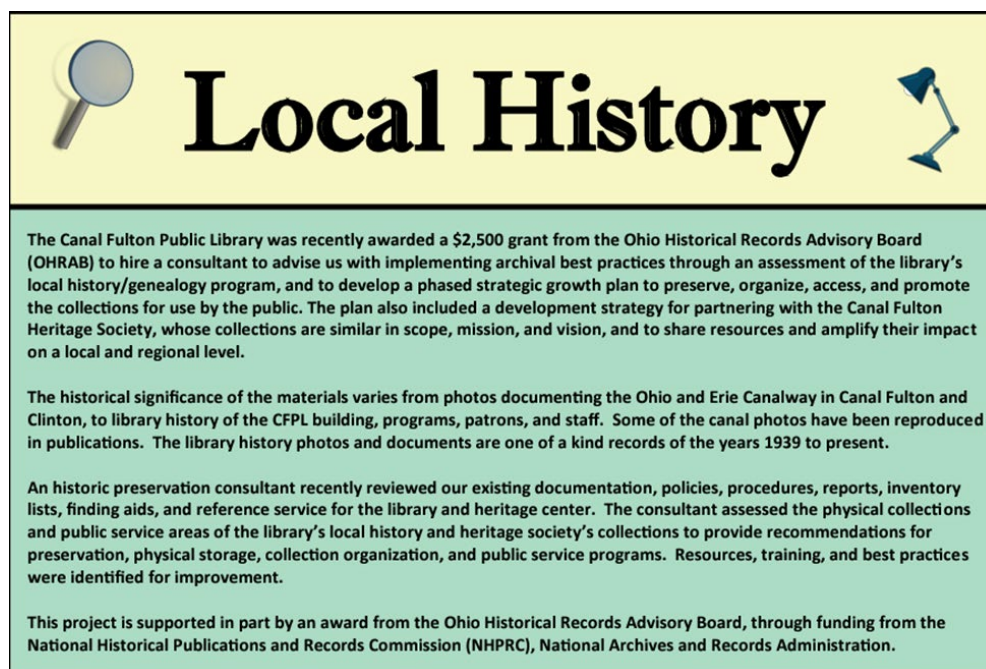
In addition, we have been taking steps to preserve the materials that we already have, including hanging up paintings, purchasing and utilizing proper archival grade storage supplies, and moving materials to the small meeting room in the upstairs floor of the library.

Share how your institution will build upon the success of the project through additional initiatives.

It is our plan to continue to implement as many recommendations made by the consultant as possible. The biggest project we are currently working on is creating a plan for a dedicated local history room in the library. A copy of the Lyrasis report was shared with the chairperson of our library board's "Buildings and Grounds" committee, and plans are in the works to make the local history room a reality, following as many of the recommendations as we realistically can.

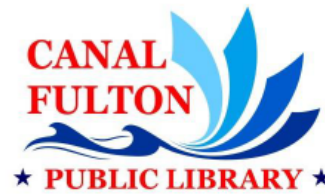
Quotes from local press coverage and also copies of articles cited.

The Canal Fulton Public Library sent out a press release at the end of May detailing the OHRAB grant award. A copy of the press release is included in this report. In addition, the text of the press release was used for an article in our library newsletter for the month of July. This newsletter is circulated in both hard-copy form, and electronically via our website and email list. A screenshot of the newsletter page is included below.



Newsletter article from July 2023

NEWS RELEASE



154 E. Market St.
Canal Fulton, OH 44224
330-854-4148

www.canalfultonlibrary.org

Date: May 31, 2023
Contact: David Brown
Contact Information: (330) 854-4148
david@canalfultonlibrary.org

Canal Fulton Public Library Awarded Archives Grant

(Canal Fulton) The Canal Fulton Public Library (CFPL) has been awarded a \$2,500 grant from the Ohio Historical Records Advisory Board (OHRAB) to hire a consultant to advise us with implementing archival best practices through an assessment of the library's local history/genealogy program, and to develop a phased strategic growth plan to preserve, organize, access, and promote the collections for use by the public. The plan will also include a development strategy for partnering with the Canal Fulton Heritage Society, whose collections are similar in scope, mission, and vision, and to share resources and amplify their impact on a local and regional level.

The historical significance of the materials varies from photos documenting the Ohio and Erie Canalway in Canal Fulton and Clinton, to library history of the CFPL building, programs, patrons, and staff. Some of the canal photos have been reproduced in

publications. The library history photos and documents are one of a kind records of the years 1939 to present.

An historic preservation consultant will review existing documentation, policies, procedures, reports, inventory lists, finding aids, and reference service for the library and heritage center. The consultant will assess the physical collections and public service areas of the library's local history and heritage society's collections to provide recommendations for preservation, physical storage, collection organization, and public service programs. Resources, training, and best practices will be identified for improvement.

The CFPL Strategic Planning Report 2022-2024, developed by Erin Kelsey at the State Library of Ohio, includes "Local History and Genealogy" as one of the five service areas that the library will address.

This project is supported in part by an award from the Ohio Historical Records Advisory Board, through funding from the National Historical Publications and Records Commission (NHPRC), National Archives and Records Administration.

The Canal Fulton Public Library is located at 154 Market St. East, Canal Fulton, Ohio.

For more information about the library or its programs, call 330-854-4148 or visit

www.canalfultonlibrary.org

#

Project expenses including an itemized list of expenditures.

The library requested a grant in the amount of \$2,500 while agreeing to a match of \$2,739.60. This would make for a total of \$5,239.60. The library did indeed match the \$2,500 grant, and also provided an additional \$258.12 for a total cost of \$5,258.12 (an amount exceeding what was initially projected.) This fulfilled all of the funding requirements.

The majority of the cost for this project provided for the payments to Lyrasis. A payment of \$900 was made to Lyrasis for Phase 1 of the consulting project. A payment of \$1,800 was made to Lyrasis for Phase 2 of the consulting project. A payment of \$1,800 was then made to Lyrasis for Phase 3 of the consulting project. Consultant travel expenses in the amount of \$159.29 were also paid. Finally, \$598.83 was spent by the library for archival supplies from Gaylord Archival. (It was recommended in our consultant's report that any additional money remaining be spent on supplies.) The total spent on this project was \$5,258.12, representing more than 100% of the projected total being spent. Copies of all of the receipts have been submitted, along with this report.

Canal Fulton Public Library			
OH Historical Records Advisory Board (OHRAB) Grant			
As of 8/31/23			
<i>date</i>	<i>vendor</i>	<i>description</i>	<i>amount</i>
6/9/23	Lyrasis	consulting project phase 1	900.00
6/29/23	Lyrasis	consulting project phase 2	1,800.00
6/29/23	Lyrasis	consultant travel expenses	159.29
7/17/23	Lyrasis	consulting project phase 3	1,800.00
8/31/23	Gaylord Archival	archival supplies	598.83
		TOTAL SPENT	5,258.12
5/19/23	OH History Connection	less: grant money receipt# 116-2023	(2,500.00)
		Match amount (min. \$2500 required)	2,758.12



LOCAL HISTORY PROGRAM IMPLEMENTATION PLAN FOR CANAL FULTON PUBLIC LIBRARY

PREPARED BY:

Katy Klettlinger, Consulting Services

June 26, 2023



Contents

Executive Summary	3
Introduction	4
Observations at CFPL & Recommendations	5
The Building Environment	5
Locations of Archival Collections	6
Collections Condition and Storage	6
Preservation Supplies	7
Programmatic Observations at CFPL & Recommendations.....	8
Staffing.....	8
Funding	8
Digitization	9
Policies	9
Exhibition of Archival Materials	10
Partnerships.....	11
CFPL Phased Program Plan.....	11
Collection Development & Preservation	12
Detailed Directives for Phase One	12
Phases Two and Beyond.....	16
Access (Intellectual)	17
Access (Physical)	17
Outreach & Services.....	17
Program Launch	18
Recommended Key Activities & Conclusion.....	18
Appendix A: Resources.....	<u>19</u>

Executive Summary

In June 2023, Canal Fulton Public Library Director, David Brown, invited Lyrasis Consultant Katy Klettlinger to assess the Library's preservation needs to provide a proposed plan implementing a local history program. The assessment also looked to identify how the library could potentially work with the Canal Fulton Heritage Society since the collecting scopes of both groups are similar.

The Library Director has demonstrated a dedication to creating a local history program following archival best practices by hiring Information Programming Specialist, Rob Hodges, in 2022 to lead the local history program part-time in addition to the other half of his work in reference. Now through the receipt of an Ohio Historical Advisory Board Re-grant, a consultant has been hired to work with the library on creating a plan for moving the local history program forward.

The report contains information and recommendations concerning archival program development and other identified program needs based on Klettlinger's survey visit on June 8, 2023. The report provides an overview of current observations and preservation practices of the library's local history materials and recommendations with a programmatic phased plan.

The local history collection at the Canal Fulton Public Library (referred to in this report at CFPL) holds valuable resources for the community, Stark County, the State of Ohio, and researchers of the history of the Erie Canal and general canal history in the United States.

The staff is committed to providing service and to promoting proper preservation and storage practices for the collections. In general, Library staff could benefit from additional preservation training, particularly in environmental monitoring, preservation/conservation workflow, and creation and preservation of digital collections. They could also benefit from a dedicated archival reading room, workspace, and one storage location for all archival holdings.

To protect the collections, an investment first in the storage environment for the collection as a whole, and then for individual items within the collections, must be made. The Special Collections and Archives should consider developing a series of fundraising efforts to ensure the continued preservation of their local history collections. This can be achieved via grant writing, or potentially via fundraising through an organizational "Friends of the Library" program.

While CFPL has already identified the need for foundational policies specific to the local history program such as a collection development policy, expanded and additional preservation-centered policies are needed for interns and volunteers who will work with the organization in the future, and, most importantly, to support the use of the collections by users.

To accomplish these tasks, recommendations are written for the library to pursue in a four-phased plan. Phase one is listed in detail to assist the library in its beginning efforts and other example templates and resources are listed in Appendix A of this report to support the library through this plan.

Introduction

On June 8, 2023, Katy Klettlinger, Program Leader for Consulting Services, Lyrrasis, worked with Library Director David Brown and staff of CFPL to conduct a program assessment survey and a set of interviews with staff and select board members of the Canal Fulton Heritage Society (referred to in this report as CFHS).

The procedure for program assessment projects is to review existing policies for the program; tour the Library building, conduct a hands-on review of archival/local history materials throughout the facility, and perform a higher-level review of these tasks with CFHS to discover potential programmatic synergies.

The consultant conducted the assessment using the following methods: interviews, a library and archives tour, photographic observation of building and grounds conditions, and a preservation and program planning discussion session. Context and background information for the assessment was provided by reviewing institutional policies and documents.

Before outlining observations and recommendations, it is important to discuss preservation and its role in a library and archival setting. There are several underlying premises upon which the recommendations in this report are based because all other programmatic initiatives are built upon it. Preservation in an archival context comprises a set of principles and strategies embodied in operational policies and procedures that are implemented to ensure that archival resources will be accessible for as long as they are needed. Because of their ties to the fundamental mission of a library, preservation strategies should be integrated fully into all aspects of Archival operations.

Preservation encompasses not only older collections but also prospective collections. The condition and format of materials acquired will have a direct impact on how long the information they contain will be accessible. Moreover, preservation is concerned not just with the special and archival collections retained permanently for their artifactual value and their usefulness as sources of information, but also with non-permanent collections and digital information resources. Questions to consider include: "How long do such materials need to be available?" and "What constitutes a useable format?" In summary, library staff are responsible for addressing these questions and making decisions regarding the preservation of all collections in all formats throughout their life cycles. Recommendations for efforts are in this report.

In an organization with a small staff size as exists at CFPL, all staff and any volunteers have a role to play regarding preservation. Those staff members with specific collection development and collection management responsibilities should be charged with determining preservation priorities for their collections. Preservation strategies should be based on what is best for the materials in the context of their anticipated life cycles and usage. As has become common in the American library and archival field, the term "preservation" is used in its broadest context in this report. It encompasses not only rehousing and repair, but also the development of policies and procedures to ensure that information is kept accessible for as long as it is needed.

To accomplish these preservation tasks, a physical space that adheres to archival best practices is essential, as this space is the foundation of CFPL's local history program. Without a space for safe materials storage, staff work, and researcher services, the program will suffer over time, and not be effective in its mission of preserving the community's history and being a premier research resource for patrons.

Included in each section is advice on best practices and/or advocacy for specific policies and procedures with a proposed programmatic phased plan for the program to perform its services effectively. The phased plan is concerned with setting achievable goals and objectives to maintain the collections, physical spaces, and can aid the library most effectively in setting both short- and long-term program goals.

Observations at CFPL & Recommendations

THE BUILDING ENVIRONMENT

Temperature, relative humidity, pollution, light, and the presence of food and drink can all have a large negative impact on the rate of deterioration of archival collections; increases in any of these factors can accelerate the rate of deteriorating chemical reactions, mold growth, warping, insect infestation, fading, and embrittlement. A good building environment will ensure the longevity of collections.

In general, the stability of all environmental levels in the Library was good. In 2011, the library conducted a preservation assessment of the collections with consultant, Jamye Jamison, of ICA in Cleveland, OH. This report contains basic steps to consider for the preservation of the collections and recommendations for materials based on their physical location throughout the library.

Providing a proper storage environment is the single most cost-effective, per-item preservation strategy an institution can employ, so additional activity in this area by Library staff should be strongly considered. In the sections below, specific aspects of the environment in the Library are discussed, and recommendations for action are presented.

Recommendations:

- The Library needs to begin a temperature and RH monitoring program, making sure that it covers all storage rooms holding local history materials. To do so, temperature and relative humidity monitors should be purchased, placed in the locations of archival materials, and checked on a routine basis. Since materials are in multiple locations, it is recommended that all be moved to one secure location for monitoring.
- In addition, check schedules to be sure that the Library has a program to change HVAC filters four times a year, as filters can become overfilled with dirt, dust, leaf particles, etc., which can create airflow problems in areas where Special Collections and Archives materials are housed.
- The Library should consider borrowing or purchasing an inexpensive light meter to detect the amounts of visible and ultraviolet light to which the collections may be exposed. This is an important activity to follow up on since many materials are located near windows without UV filtering or blinds. Two resources can be helpful for this. The first is NEDCC's publication on Library and Archival lighting, "Protection from Light Damage," available at: <https://www.nedcc.org/free-resources/preservation-leaflets/2.-the-environment/2.4-protection-from-light-damage>. Additionally, NEDCC's Supplies and Suppliers list has a category of light reading equipment and several reputable equipment vendors listed at <http://www.nedcc.org/resources/suppliers.php>

- Expand the practice of storing collections materials in light-tight archival boxes, enclosures, and containers.
- Review the 2011 preservation assessment by ICA and follow recommendations.

LOCATIONS OF ARCHIVAL COLLECTIONS

Archival materials are in several places within the library. All materials need to be housed in one location so they can be better environmentally monitored and more accessible. Also, a secure location is needed for materials because many are located on open shelves, such as bound newspapers in the adult reading area.

The first step for the Library will be to find a temporary space for all items to be housed together in one location for better monitoring and to assess the materials that Library has. Having materials in one space will improve opportunities for archival rehousing, cataloging, and monitoring. Also, the space will need to adhere to archival best practices for storage. Resources for archival storage best practices are in Appendix A.

Recommendations:

- Currently, the library has an open room on the second floor of the library that is secure from the public. Room 201, which was originally a meeting room, has a large table that can be used for collections processing. Since the amount of local history materials is minimal floor weight should not be an issue. This should be considered a temporary storage location for the materials until another suitable space can be created in the future.
- A permanent room will need to be created to house local history materials for the long-term. This room should be created on the main floor of the library. In addition to storage space, a reading room will also be needed to offer reference assistance in a secure area. It is recommended that CFPL employ a space planning consultant with an archival background to identify a suitable permanent location for materials within the library footprint after local history materials have been accessed and organized.

COLLECTIONS CONDITION AND STORAGE

This section of the report is not intended to be an item-by-item evaluation, but to provide a summary of the general condition of the materials, the damage most characteristic in archival collections, and improved storage and handling practices. More detailed information can be found in the 2011 recommendations report by ICA consultant Jamye Jamison.

In their current storage setting, there are some specific concerns among portions of local history materials. Many of them are related to collection storage practices, and some can be easily remedied.

Overall, the condition of the materials on the shelves seemed to be relatively good during the tour of the collection. For added protection from dust and other environmental factors, and for better support for some paper materials, the Library should consider a long-term program of

boxing any materials currently stored on the shelves which are not yet in archival-quality containers. These types of storage materials can be purchased via grant funding or through a regular preservation supply budget.

Specific observations related to storage are listed below; these findings are preceded by some general collection storage and condition recommendations.

- The Library's collection of microfilms is stored in a box located in the incoming library director's office. There is a vinegar smell, which is the sign of microfilm deterioration. Because microfilm readers are becoming more difficult to maintain, it is suggested that, where possible, the library consider phasing out microfilm collections and replacing the access method to these materials with digital copies. Services are available to convert microfilm and fiche to digital format, but it is first recommended for the library to contact the digitization services program at the Ohio History Connection for guidance since the film was created by them and is almost all duplicate film rolls.
- The shelving on which books are stored is made of wood. Wood will off-gas into the books, causing further deterioration, especially for books located in glass cases. It is highly recommended that books are removed from these shelves and placed on archival-grade metal shelving. This standard should also be followed for archival materials located in closets with wood shelves.
- The library has a small number of paintings and other artwork on the floors in various locations. To avoid damage from leaks, dirt/dust, pests, or even kicking by a visitor to the room, consider mounting this painting on the wall or removing them to a safer area on archival art storage racks.



Art rack storage can be purchased as a system as in the image or placed along a wall in one row.

PRESERVATION SUPPLIES

It is strongly recommended by the consultant that any additional funds available from this current OHRAB be used for supplies, including protective enclosures for rare books and special collections materials (especially oversized materials) which are not already boxed.

Other recommendations for purchase not currently owned by the library include:

- Onset MX1104 Environmental Control Loggers (for any area where archival materials are stored)
- Book Cradles
- Nilfisk HEPA Vacuum Cleaner
- Rare Book ID Tags
- Water Monitors
- Polyester Sleeves
- Permalife Acid-free Paper

Because the Library may need to purchase a relatively large number of preservation supplies, the organization should try to locate, within Ohio, a method to get a multi-institutional consortial discount on the purchase of preservation supplies. If one cannot be located, the consultant has some suggestions for regional purchasing consortia to explore.

Programmatic Observations at CFPL & Recommendations

STAFFING

Staffing for preservation and archival activities at CFPL was begun last year by hiring a full-time librarian whose time is dedicated to working part-time with the local history collections part-time. Since the number of materials to organize and process is manageable, this staff allocation is suitable until the program is ready to be fully launched to the public.

While the library has the staffing needed, this person could benefit from additional archival training. It is recommended that online webinars are pursued from professional organizations such as the Society of American Archivists or that the staff person attend in-state conferences hosted by the Society of Ohio Archivists or the Ohio Local History Alliance. Lyrasis also has a suite of online classes covering beginning to expert archival work.

FUNDING

Currently, like other Ohio public libraries of similar size, funding for programmatic needs is pulled from one lump budget by the approval of the library director. Programs do not have specific line-item funding. This could make procuring funds for preservation challenging as the program will be competing with others within the library that are more forward facing.

Dedicated funding for supplies, training, programming, and storage will be needed for the local history program to become fully accessible. It is recommended that the library pursue additional grant funding or seek an endowment specifically allocated to the program.

Potential future granting sources, which could be used to address the needs outlined in this report, include:

- The National Endowment for the Humanities Preservation Assistance Grant (PAG) program. This category awards up to \$10,000 for additional preservation consultation, supplies, or environmental monitoring equipment. Having a program survey, such as this study, allows an institution to apply for a wide variety of additional preservation help. Future grants in this category could be used for additional environmental monitoring equipment, digital preservation consulting, disaster plan development and training, and additional special collections supplies. The deadline for this grant has recently been moved to mid-January each year. Guidelines are available at: <http://www.neh.gov/grants/preservation/preservation-assistance-grants-smaller-institutions>
- National Endowment for the Humanities Sustaining Cultural Heritage Collections (SCHC) grants offer up to \$40,000 in the first phase to work with security, HVAC, or

other building engineers, and then \$400,000 to address the problems which those experts have diagnosed. Information is at:

<http://www.neh.gov/grants/preservation/sustaining-cultural-heritage-collections>

- Additionally, please look at other National Endowment for the Humanities, Division of Preservation and Access grants such as Humanities Collections and Reference Resources Grants, and NEH Challenge Grants as possible matching funds for any university-based or local grants.
- Work with the State Library of Ohio to determine if there are Library Services and Technology Act (LSTA) grants which are open to provide money for preservation or digitization projects.
- The Ohio History Grant from the Ohio History Connection is another valuable resource for funding.
- Private funding sources should be approached with proposals for funding special collections and archival preservation activities.
- Collaborative preservation and digitization projects are always attractive to funders. Consider working with other organizations in s to pursue funding for the preservation and digitization of collections.
- A wonderful resource for locating additional preservation grant providers has been established by the Library of Congress and the Foundation Center. It provides specific information on grants available to libraries and Library from local, state, regional, and national funders. A link to the PDF version of this publication is available at: <http://www.loc.gov/preservation/about/foundtn-grants.pdf>.

DIGITIZATION

Staff are not currently digitizing materials. For several reasons, including to reduce the handling of collections, and provide greater access to patrons conducting research from a distance, the Library may want to consider beginning to develop a digitization program after materials have been organized and are accessible.

It is recommended that the library invests in an online archival catalog platform to provide access to collections. Some available platforms are ArchivesSpace, ContentDM, and PastPerfect.

In lieu of launching a digitization program, the library could also partner with other state programs to place materials on their platforms. Ohio Memory, the Ohio Digitization Hub, and Summit County Memory are potential partners.

POLICIES

Before materials are accessible to the public it is highly recommended for the library to create a collection development policy. This policy will outline what is housed by the library, how materials are accepted, and what does not fit the program's scope. It will serve as the foundational document for the local history program. It will provide the library with a mission for collecting and serve to control what the program accepts, which will improve access. Information to create this policy is in the phase plan later in this report.

After the collection development policy is created, the library will want to determine what donation agreements they currently have. Donation agreements cement ownership of materials so this documentation is crucial to the program. If information is found in materials of who a donor(s) is, but a signed agreement cannot be found it is highly recommended for the library to contact the party or party's heir for a signed agreement if possible.

Below are some other policy documents the consultant has suggested to other Libraries and Archives. The consultant can provide samples of these policy types as needed.

- Accession Form
- Research Inquiry Form
- Attribution/Citation Requirement
- License for Reproduction

Information on these archival program forms and policies can be found in Appendix A.

EXHIBITION OF ARCHIVAL MATERIALS

When planning for exhibits in the future, the library should utilize best practice by using surrogate copies of items for display, to protect originals from damage due to exposure to light, off-gassing from display cases and materials, and other causes. This is extremely important as some materials may be displayed for quite a lengthy period of time.

If rare or unique books are exhibited at any time, they should always be placed as far from any lights as possible. Additionally, any future exhibit utilizing original materials should be limited in timespan to three months; the exhibits need to be monitored so that material is not up longer than recommended. In the future, online exhibits can be developed as part of the library's digitization efforts, and a written policy for both actual and virtual exhibits should be developed.

If an exhibit case containing archival materials must be lit from the inside, objects should be on display for a maximum of three months at a time and should then be put away and housed in appropriate enclosures. Light exposure within the cases needs to be limited to 50-150 lux; with sensitive materials, such as handwritten manuscripts, light exposure needs to be limited to 50 lux. Ultraviolet radiation should never exceed 75 microwatts per lumen. LED (light emitting diode) lights or cold cathode lights produce much less heat than incandescent or fluorescent lighting. Fluorescent lighting should not be used inside the same part of the display case as the documents; the ballast has the potential to cause serious heat damage and is a fire hazard. If fluorescent lights must be used, place the ballast in separate chambers from the documents, install exhaust fans, and filter out the ultraviolet rays. Due to the potential for off-gassing from wooden shelves, it is recommended that a glass barrier be installed on top of the wooden shelves.

The aforementioned NEDCC Leaflets series contains a concise and excellent document about exhibition of archival materials and can be found at http://www.nedcc.org/resources/leaflets/2The_Environment/05ProtectingCollections.php.

PARTNERSHIPS

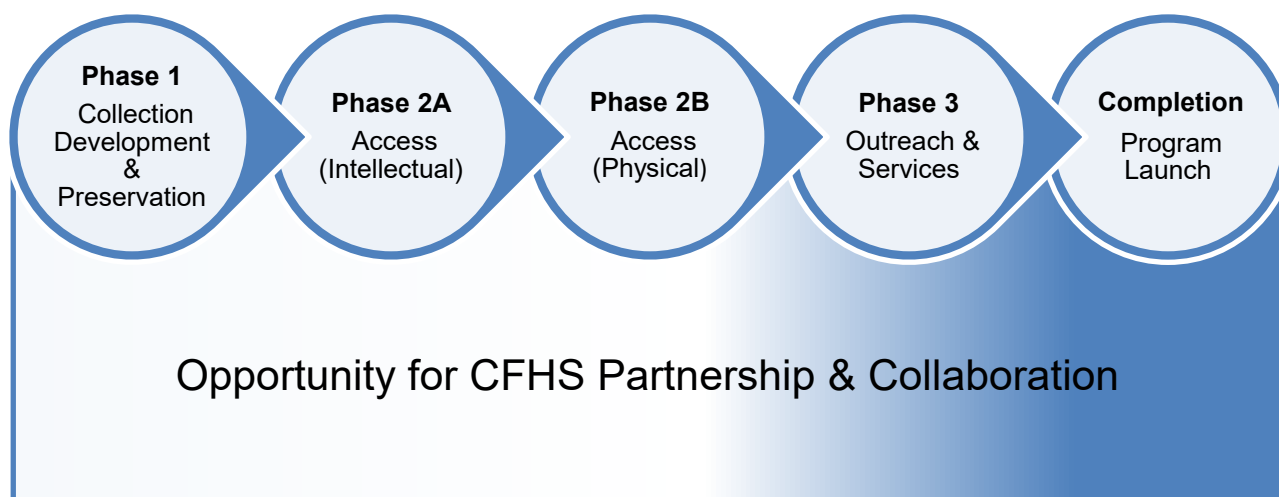
A question of the library for this report was to examine how the Library and local history organization, the CFHS, could work together in the future since both had similar services. During an on-site visit with a member of the society's board and their board president, it was determined that both parties are interested in working with each other, but they are unsure how. This is because both organizations are at the beginning of growing programs for archival materials that they possess. Also, the work of the Heritage Society is currently focused on museum objects and outreach programming, which leaves little to no time for their archival materials.

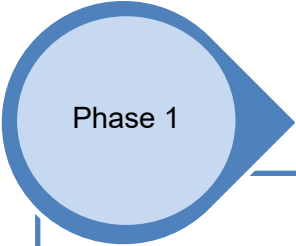
Since the library employs a librarian who is specifically assigned to begin the processing of their local history collections, it is recommended that these efforts are done by the library first before they reach out for partnership opportunities. This will help the library learn more about what they have and allow them to serve as a resource to CFHS on their materials once the libraries collections have been organized and processed. Discussions should then continue on how the groups can work together. It is the belief of this consultant that more programmatic work is needed by the library before partnership efforts are pursued.

CFPL Phased Program Plan

Below is a phased plan providing recommendations for beginning archival efforts and moving toward a robust program.

Stages for the plan are as follows:





Phase 1

COLLECTION DEVELOPMENT & PRESERVATION

- Move collections to a temporary storage area with a workspace
- Conduct inventory of collections
 - Appraise materials for historical value
 - Evaluate physical condition of materials
- Develop a Collections Development Policy
 - Deaccession materials as appropriate
 - Track ownership of retained materials
- Determine the existence of donor agreements
 - Find existing agreements
 - Attempt to identify donors of undocumented materials
 - Create sound donation procedures going forward
- Perform preservation best practices on materials
 - Purchase needed supplies storage and handling
 - Re-house materials as needed
- Create a webpage to share updates on programmatic work and accessible resources

Detailed Directives for Phase One

To aid the library with the first steps towards creating a local history program, below are detailed steps that will help the library complete phase one of the project. For the remaining phases, dedicated time in staff time, resources, consulting services, and training will be needed to move forward. Pursuing grant support or a private donation to aide in this work is recommended if operating expenses are stretched thin.

Conduct an Inventory of Collections

When an archivist conducts an inventory of their collections, they are essentially creating a detailed list of all the materials in their care. This includes information about the physical

condition of the materials, their location, their provenance (history of ownership). The inventory can be used for a variety of purposes, such as:

- Managing preservation: An inventory can help archivists track the condition of the collection and identify any materials that need to be preserved or repaired.
- Narrow the collection's scope: Knowing what is in the collection will help archivists with deaccessioning if materials do not adhere to their collection development policy or help them determine what content the policy should contain if they do not have one.
- Documenting ownership and copyright: Inventories help archivists determine whether it has ownership document for the materials and determine actions to take to attain ownership if they do not.
- Planning for the future: An inventory can help archivists plan for the future of the collection, such as by identifying materials that need to be reformatted or digitized.

The specific steps involved in conducting an inventory will vary depending on the size and complexity of the collection. However, the following are some of the general tasks that an archivist will typically perform:

1. Identify the materials to be inventoried. This may involve physically inspecting the collection, reviewing accession records, or consulting with donors or other stakeholders.
2. Create a list of the materials. This list should include the following information for each item:
 - Title
 - Creator
 - Date
 - Physical description
 - Provenance
 - Content
3. Evaluate the condition of the materials. This may involve inspecting the materials for physical damage, such as tears, mold, or fading.
4. Make notes about any special features or restrictions. For example, some materials may be fragile or require special handling.

The process of conducting an inventory can be time-consuming and labor-intensive. However, it is an essential task that helps archivists ensure the preservation and accessibility of their collections.

Appraisal During Inventorying

Archivists appraise materials to determine their value for their institution. This value can be based on several factors, including the materials' historical, legal, or cultural significance.

The specific criteria used for appraisal will vary depending on the institution's mission and collecting priorities. During appraisal it is advised to focus on the content of the material and how the information it contains can benefit your community, region, or history on a national level. Also, materials that are unique are highly valuable to your collection if their content matches the institution's desired collecting scope.

If the institution does not yet have a collection development policy appraising materials as you inventory them will help determine the collecting areas to place in the policy, the formats to accept and accept, and help determine content areas for further development. Appraisal decisions can be made during the inventory process, but it is advised to not physically deaccession materials until after the collection development policy has been made.

The appraisal process can be time-consuming and complex. However, it is an essential task that helps archivists ensure that their collections are properly preserved and managed.

Here are some examples of how archivists might appraise historical materials:

- A collection of letters from a historical figure might be appraised as having high historical value, as it could provide insights into the figure's thoughts and actions.
- A collection of photographs of a particular event or time period might be appraised as having high cultural value, as it could help people understand and appreciate that event or subject.

Ultimately, the goal of archival appraisal is to ensure that the most important and valuable materials are preserved. If it is determined that some materials in the collection do not fit the collection development policy or the institutions collecting scope, then deaccessioning them is recommended. Ideally the institution will look for another cultural heritage organization who could benefit from the materials. If efforts to rehouse the materials with another institution are not fruitful it is recommended to document the efforts that were taken and then dispose of the materials in a conservative method. Simply throwing something in the trash can that is easily retrievable by someone else is not responsible and could lead to disagreement. Using a vendor to securely transport and dispose of materials is the safest method of deaccession. Deaccessioning and disposing of archival materials is a very important decision so it is imperative that the institution follows detailed procedures and documents their decision making that led to its removal.

Create a Collection Development Policy

Collection development policies are considered the foundational document for an archival program. They provide a framework for making decisions about which materials to collect, preserve, and make accessible to patrons.

Collection development policies can be helpful to archivists in several ways. They can:

- Help archivists make informed decisions about which materials to collect.
- Ensure that the institution's collections are comprehensive and representative of the institution's mission.
- Avoid duplication of materials.
- Prevent the acquisition of biased or outdated materials.
- Protect the institution from legal liability.
- Provide guidance to donors and other stakeholders.
- Promote the use of the institution's collections by researchers.

A well-written collection development policy should include the following elements:

- A statement of the institution's mission and collecting priorities.
- A description of the types of materials that the institution collects.
- Criteria for evaluating the value of materials.
- Procedures for acquiring and processing materials.
- Guidelines for managing and preserving materials.
- Policies for access and use of materials.

To assist the library in making a collection of development policy Appendix A provides a list of worthwhile policies created by other institutions that can be used for reference.

Donor Agreements

Donor Agreements document that outlines the terms and conditions of a donation of archival materials to an archives or other repository. It is typically signed by both the donor and the repository, and it serves to protect the interests of both parties.

The donor agreement typically includes the following information:

- The name of the donor and the repository
- The description of the materials being donated
- The terms of the donation, such as whether the materials are being donated outright or on loan
- Any restrictions on access to the materials, such as time-limited access or restrictions on publication
- The rights of the donor and the repository to use the materials
- The signatures of the donor and the repository

A donor agreement is an important tool for ensuring that both the donor and the repository are clear on the terms of the donation. It can also help to prevent misunderstandings or disputes down the road.

To assist the library in making a donor agreement appendix A provides a list of worthwhile policies created by other institutions that can be used for reference.

Preservation of Collections

Directives have been placed in this report to assist the library with beginning to rehouse all archival materials. Directives are also located in the 2011 preservation assessment report by ICA consultant Jamye, Jamison.

Rehousing materials will take time but can be done simultaneously as collections are being processed if the library would like to combine steps. Regardless it is advised that collections with the most damage be placed into new housing materials immediately to prevent further

deterioration the library staff has the basic understanding of archival best practices for preservation but could benefit from additional trainings to assist them with this effort.

For quick reference, [Conserve O Grams](#), from the National Park Service, can aid the local history librarian in beginning this work. Suggested pamphlets for reference include based on materials seen by the consultant while visiting the library:

- 19/2 [Care and Security of Rare Books](#) 1993
- 19/3 [Use and Handling of Rare Books](#) 1993
- 19/8 [Preservation of Magnetic Media](#) 1993
- 19/9 [Caring for Blueprints and Cyanotypes](#) 1995
- 19/15 [Storing Archival Paper-Based Materials](#) 1996
- 19/16 [Housing Archival Paper-Based Materials](#) 1996
- 19/17 [Handling Archival Documents and Manuscripts](#) 1996
- 19/18 [How to Care for Bound Archival Materials](#) 1996

While these pamphlets are dated, their information constitutes archives best practices. Additional materials for reference can be found in appendix A.

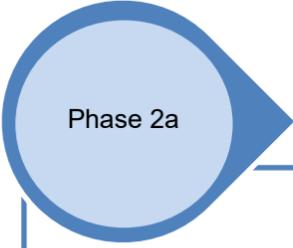
Webpage

This grant requires in online product to be accessible to users based on the project work. The goal of the library is to ultimately select and use in online archival catalog which will be carried out in later phases of this work period since the library still has to organize and assess its materials it is recommended for a web page to be created to update the public on the project in what materials are being discovered during the inventory process this will assist the library in shaping a collection development policy by receiving feedback from the community and also begin the efforts of outreach for the program in order to build support.

Currently the library has a web page that has basic information for the program using WordPress. It is recommended that this page be continued and added to on a routine basis to share accomplishments of the program.

Phases Two and Beyond

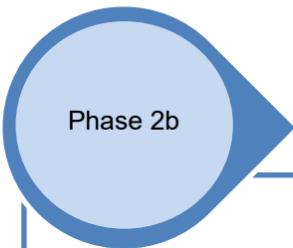
The parameters of this grant iterated that a detailed phase plan would be put in place for phase one along with resources needed. The remaining phases are in list form to help the library know how the program should evolve over time. More planning will be needed on the part of the library to accomplish this work but once phase one is complete the consultant has confidence that the library will be able to achieve these tasks independently or with the advisement of a consultant if it is recommended in the report.



Phase 2a

ACCESS (INTELLECTUAL)

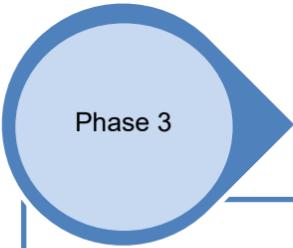
- Process collections to create finding aids and catalog records
- Explore and invest in catalog a solution to place processed materials online
- Create policies and forms for copyright, attribution, and reproduction



Phase 2b

ACCESS (PHYSICAL)

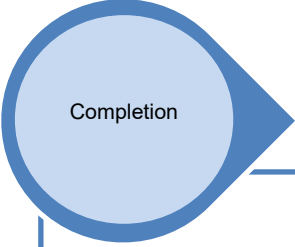
- Hire a consultant to design a permanent location for Local History Program on the main floor of the library. Consultant should provide specific directives for this phase.
- Pursue funding for program space and amenities
- Move collections to new space and organize



Phase 3

OUTREACH & SERVICES

- Develop procedures for reference services for collections
- Place catalog platform online for public access
- Explore local and regional partnerships to develop new programs and opportunities, particularly for digitization
- Meet with CFHS to share program progress and explore collaboration
- Create a plan for program promotion to users
- Create a library exhibit to coincide with official program launch



Completion

PROGRAM LAUNCH

- Hold an official program launch event
- Develop first year goals for program

Recommended Key Activities & Conclusion

Lyrasis and I want to relay our sincere thanks for allowing us to consult on your project. Working with your institution was a wonderful experience, and we look forward to hearing about your program endeavors going forward.

Sincerely,



Katy L. W. Klettlinger
Program Leader, Consulting Services
Email: katy.klettlinger@Lyrasis.org

APPENDIX A: RESOURCES

Access & Copyright

- For published works: <https://librarycopyright.net/resources/digitalslider/index.html>
- For any work: <https://librarycopyright.net/resources/genie/genie.php>
- The Right Portal: <https://rights-portal.dp.la/>
- Fair Use Checklist: https://guides.library.cornell.edu/ld.php?content_id=63936868
- License Chooser: <https://chooser-beta.creativecommons.org/>
- Society of American Archivists Orphan Works: Statement of Best Practices: <https://www2.archivists.org/sites/all/files/OrphanWorks-June2009.pdf>

Collection Development Policy

- University of Virginia Libraries: <https://www.library.virginia.edu/special-collections/collections/collection-development-policy/>
- University of North Texas Libraries: <https://library.unt.edu/policies/special-collections-collection-development/>

Donor Agreements

- A Guide to Deeds of Gift: <https://www2.archivists.org/publications/brochures/deeds-of-gift>
- Clinton-Macomb Public Library (MI): <https://cmpl.org/wp-content/uploads/2015/11/MGT-5-Gifts-and-Donations-Historical-Materials-Deed-of-Gift-Form.pdf>
- Western Reserve Historical Society: https://www.wrhs.org/wp-content/uploads/2020/04/Deed-of-Gift-v042720_for-digital-collecting.pdf

Preservation

- Environmental Monitoring: <https://ccaha.org/taxonomy/term/35>
- Exhibiting Libraries and Archives Materials: <https://libguides.lib.msu.edu/exhibittips>
- NEDCC Preservation Leaflets: <https://www.nedcc.org/free-resources/preservation-leaflets/overview>
- Preservation 101 Online Textbook: <https://www.nedcc.org/preservation101/welcome>
- Preservation Self-Assessment Program: <https://psap.library.illinois.edu/>

Outreach

- Archives AWARE!: <https://archivesaware.archivists.org/>
- Budgeting for Collections Care: <https://ccaha.org/resources/budgeting-collections-care>

Program Documents

- Standards and Best Practices Resource Guide: <https://www2.archivists.org/groups/museum-archives-section/standards-best-practices-resource-guide>

Storage

- Archival Storage Standards (NARA): <https://www.archives.gov/files/preservation/1571-archival-storage-standards-full-version.pdf>

**Ohio Historical Records Advisory Board
National Historical Records & Publications (NHPRC)
State and National Archival Partnership (SNAP) Grants Regrant Program**

Salaries and Wages	Grant Funds	Matching Funds	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotals: Salaries and Wages	\$0.00	\$0.00	\$0.00
Supplies	Grant Funds	Matching Funds	Total
Gaylord Archival	\$170.35	\$428.48	\$598.83
			\$0.00
			\$0.00
			\$0.00
Subtotals: Supplies	\$170.35	\$428.48	\$598.83
Equipment	Grant Funds	Matching Funds	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotals: Equipments	\$0.00	\$0.00	\$0.00
Contracted Services	Grant Funds	Matching Funds	Total
Lyrasis phase 1	\$450.00	\$450.00	\$900.00
Lyrasis phase 2	\$900.00	\$900.00	\$1,800.00
Lyrasis travel expense	\$79.65	\$79.64	\$159.29
Lyrasis phase 3	\$900.00	\$900.00	\$1,800.00
Subtotals: Contracted Services	\$2,329.65	\$2,329.64	\$4,659.29
Other Eligible Expenses	Grant Funds	Matching Funds	Total
			\$0.00
			\$0.00
			\$0.00
			\$0.00
Subtotals: Other Eligible Expenses	\$0.00	\$0.00	\$0.00
Summary Budget	Grant Funds	Matching Funds	Total
<i>Salaries and Wages</i>	\$0.00	\$0.00	\$0.00
<i>Supplies</i>	\$170.35	\$428.48	\$598.83
<i>Equipment</i>	\$0.00	\$0.00	\$0.00
<i>Contracted Services</i>	\$2,329.65	\$2,329.64	\$4,659.29
<i>Other Eligible Expenses</i>	\$0.00	\$0.00	\$0.00
Total Project Budget	\$2,500.00	\$2,758.12	\$5,258.12

If you do not receive full funding, will you accept partial funding and still complete the project as outlined in the application?

Yes

No

--	--

