



# Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

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Series Set III Number 3

September 2000

## Set III Strategies for Vice-Presidents

### Moving your Collection to a Public Library

by Edward E. Steele, Librarian

## Supplemental Page

This strategy paper, written some years ago, is an FGS *Classic* that contains ideas and strategies still relevant today in society management.

Thinking of gathering your society's collections and placing them into the local public library? This paper outlines one society's experience moving 20,000 items to the public library.

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## Set III Strategies for Vice-Presidents Moving your Collection to a Public Library

by **Edward E. Steele, Librarian**  
**St. Louis Genealogical Society**

In 1996, the St. Louis Genealogical Society and the St. Louis County Library signed an agreement to transfer the extensive collection of the Society to the County Library's headquarters. This collection of about 20,000 items including books, microfiche, sheet maps, and vertical files, had grown considerably since the Society was formed in 1967. In 1970, the Society signed a two-year agreement with the University City Public Library to house the growing collection. That agreement continued for more than 25 years.

But when it became necessary for the collection to be moved, the Society's building committee began an earnest search for potential sites. They examined the cost to acquire, refurbish, equip, staff, and operate a joint office and library and found the building fund was no match for the cost of this effort.

At the same time, at every meeting we asked our members what their desires were. The idea of locating the collection at the St. Louis County Library headquarters was repeatedly the overwhelming choice of our members.

As luck would have it, the County Library was also interested in establishing a genealogical collection for their patrons. So we began serious discussions.

We asked FGS what other societies had done in working with public libraries. We were given many sample agreements and a lot of war stories. We tried to learn from them all. From these, we drafted a contract proposal which we presented to the County Library.

Along the way a few words were changed and one or two items added or deleted, but the basic outline of that contract is what we agreed to in September, 1996. That agreement follows the text of this paper.

Several items were essential to the Society in forming this agreement.

(1) The collection remains intact, to be housed on open shelves as a non-circulating, reference collection. It is to be located in a special area, adjacent to the Library's existing microfilm collection (which already includes extensive area genealogical materials).

(2) The dedicated volunteers who managed our Library for years will continue to assist genealogists at the County Library. Some duties changed (e.g., library staff re-shelves the books) but the people aspect of the Library will remain. In our minds, this was essential.

(3) The Society and the Library will jointly design

a collection development policy. This point was strongly recommended in our input from FGS and also by members of our Society who are professional librarians.

(4) This is a long-term agreement (initially ten years) in which both the Society and the Library are contributing significant assets and efforts.

Has it worked? Yes. The combination of resources from the Society and Library have created a synergy that is terrific for the St. Louis area genealogical community. Coincidentally, the County Library headquarters is located only one block from one of St. Louis' Family History Centers. So we have a pretty exciting genealogical corner going: more synergy.

Also, the Library has assumed the tasks and expenses of operating and maintaining the collection so we can spend more of the Society's dollars and volunteer hours in building the collection for our members.

[About the author: Ted Steele is president of the St. Louis Genealogical Society, author of *A Guide to Genealogical Research in St. Louis*, and lectures on a variety of genealogical research topics. He was the local arrangements chair for the FGS Conference in St. Louis in 1993 and the co-chair for the FGS Conference in St. Louis in 1999. Ted provides reviews for New England books to the FGS Forum.]

AGREEMENT BETWEEN  
THE ST. LOUIS GENEALOGICAL SOCIETY AND THE ST. LOUIS COUNTY LIBRARY

WHEREAS, the St. Louis Genealogical Society ("the Society"), a not-for-profit corporation, State of Missouri, now owns and maintains a genealogical collection of approximately 20,000 items consisting of books, microfilm, microfiche, sheet maps and other materials ("the Collection"); and

WHEREAS, the Society currently houses the Collection at the University City Public Library, which has notified the Society that the Collection must be removed from its facilities; and

WHEREAS, the St. Louis County Library ("the Library"), a political subdivision of the State of Missouri, operates a public library with multiple locations and varied hours of operation; and

WHEREAS, the Society is seeking a location for the Collection and the Library desires to better serve its patrons by providing an expanded collection of genealogical materials and services;

NOW, THEREFORE, the Society and the Library enter into an agreement to incorporate the Collection into the Library's holdings.

I. GENERAL CONDITIONS

1. The Society will transfer all right, title and interest in and to the Collection to the Library under the conditions set forth in this agreement.
2. The Library will provide space and shelving for the Collection at no cost to the Society. The Library recognizes that the Collection may grow in volume and that additional space and shelving may be required to house the Collection in the future. Facilities for any such expansion will be provided by the Library at no cost to the Society.
3. The Library recognizes that items in the Collection consist of a variety of formats, including bound books, loose-leaf notebooks, microforms, sheet maps, vertical files, etc.
4. The Collection will be moved from its present location to the Library at the Library's expense and will be available for use by the public within four weeks thereafter.
5. The Library will house the Collection at its Headquarters Location, 1640 South Lindbergh Blvd., St. Louis, MO 63131-3598, on open shelves for patron use.

At its discretion, the Library may transfer low-usage materials to closed stacks, which may be located at other branches. All items in the Collection, however, including those in closed stacks, will be included in the Library's catalogue. Items housed in closed stacks will be available for patron use within 48 hours of notice to the Library.

6. Genealogical materials now owned or subsequently acquired by the Library may be shelved with the Collection, but will not become part of the Collection.
7. The Library will affix a bookplate or other suitable and visible identification, mutually agreed upon by the Society and Library, to each item in the Collection indicating that it has been transferred to the Library by the Society.
8. The Society and the Library will meet at least annually to review the status of this agreement.

## II. PROCESSING THE COLLECTION

1. The Library will, at its own expense, enter the Collection into its computerized catalogue. Each such catalogue entry will contain a searchable field indicating that the item was donated by the Society.
2. The Library will incorporate the Collection into its existing collection using the Dewey decimal classification system. To preserve ease of patron use, the Library will make every reasonable effort to maintain the Collection in one contiguous location, preserving the cataloguing of associated materials by state wherever possible.
3. The Library may, at its discretion and expense, repair or re-bind any items in the Collection.
4. The Society may continue to add items to the Collection, subject to approval from the Library, either through materials donated to or purchased by the Society. All such additions will be physically marked with a Bookplate and processed with a searchable field to indicate that these items were donated by the Society.
5. The Library and the Society will jointly create a Collection Development Policy to establish guidelines for adding genealogical materials to the Collection.

## III. ACQUISITION AND MAINTENANCE

1. Any item in the Collection no longer desired by the Library will be returned to the Society. The Library will not otherwise dispose of any items in the Collection without previous written agreement with the Society, provided the Society responds within 90 days. If no notice is received, the Library may act independently to dispose of these materials.
2. Some items in the Collection may duplicate items currently in the holdings of the Library. Any such duplicate items not desired by the Library will either be returned to the Society or may be made available to the Library's circulating collection, by joint agreement between the Society and the Library.
3. The Library may, at its discretion and expense, repair and re-bind any items in the Collection.
4. The Society may continue to add items to the Collection, subject to approval from the Library, either through materials donated to or purchased by the Society. All such additions will be physically marked with a Bookplate and processed with a searchable field to indicate that these items were donated by the Society.
5. The Library and the Society will jointly create a Collection Development Policy to establish guidelines for adding genealogical materials to the Collection.

## IV. USE OF THE COLLECTION

1. The Library will treat the Collection as a non-circulating, reference collection. Some items in the Collection may be made available for inter-library loan.

2. The Library may provide materials from the Collection to its other branches within the St. Louis County Library system to meet patron needs. Such inter-library loaned materials will be treated as non-circulating by the receiving branch and will be returned to the Headquarters location.
3. Subject to budget considerations, the Library will provide and maintain sufficient, reasonable and appropriate equipment (e.g., microfilm viewers/printers, personal computers, CD-ROM devices, etc.) to utilize the materials in the Collection.
4. Society members may volunteer to provide patron assistance in the use of the Collection, subject to the consent of the Library. Any such volunteers will be identified as Society volunteers by an appropriate badge, to be provided by the Society. Volunteers will abide by all Library regulations and will work under Library supervision.
5. The Society may, upon advance notice and approval from the Library, remove selected items from the Collection for internal use for a period of time not to exceed 30 days.

V. SECURITY AND INSURANCE

1. The Library will affix a security label to appropriate items in the Collection, at no cost to the Society. The Library will maintain adequate and appropriate security facilities to protect the Collection.
2. The Library will maintain adequate and appropriate insurance for the Collection.

VI. TERM OF THE AGREEMENT

1. The term of this agreement is for a ten-year period, commencing on the date set forth below. During this ten-year period, this agreement may be amended or terminated only by mutual written agreement between the Society and the Library.
2. At the end of the ten-year period, this Agreement will automatically continue, except for this Item VI, unless either party has given one-year written notice to the other of its desire to terminate this Agreement.
3. If the Library decides not to renew this agreement, the then Collection of Society-designated materials (including any additions to the Collection per the terms of this agreement) will be returned to the Society. If the Society decides not to renew this agreement, the Society will reimburse the Library for its costs to process the Collection in the amount of \$xxxx, after which the then Collection of Society-designated materials (including any additions to the Collection per the terms of this agreement) will be returned to the Society.
4. Unless either party gives written notice of intent to terminate as set forth in Paragraph 2 above, this Agreement shall continue permanently under the terms and conditions set forth herein, excluding this Item VI headed "Term of Agreement."

The term of this Agreement begins on: \_\_\_\_\_  
Date

Approved and signed by:

\_\_\_\_\_  
President, St. Louis Genealogical Society

\_\_\_\_\_  
Director, St. Louis County Library

Date: \_\_\_\_\_

Date: \_\_\_\_\_