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Rhode Island Library Association Bulletin

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What's It Worth? A Look at the Appraisal Process

JOHN A. WOODS

How do people who collect all their lives suddenly decide to give what they have to libraries, historical societies or other repositories? How do families or businesses (which are often extensions of families) decide to donate large or small collections for public use? Who are the players? And what does an appraiser do?

The general scenario begins something like this. There is a collection in private hands. There is a death, a will, a donation, a sale, a receipt. And the process begins. Everyone has an interest: the state, the federal government, the family, the library, and the professional world. Let me attempt to describe this process from the family's point of view, using a hypothetical example.

Uncle Ted has a collection of books and documents he has been gathering since his undergraduate days. In the beginning, he had little interest in collecting, but as time went on, he became bored with his daily work as a map librarian and spent more time identifying and classifying what was slowly becoming a considerable collection. (*Collection* is an interesting word. If there are only three of a kind in the world, and you have two, perhaps you not only have a collection but you have cornered the market!)

Uncle Ted's collection has driven his wife to distraction and as the collection now numbers some 2,000 objects, it has become cumbersome. He is considering going into the business of buying and selling items when he retires from

being a map person. One day, Uncle Ted, however, has a sudden heart attack, and dies.

What to do? The family, after a period of mourning, meets and confers. Ted has children, but their world is computers - not first editions. Also - living in the lifestyle of the nineties, their houses are smaller, and there is little room for a large collection in Junior's condominium. Finally the family approaches a local library. After preliminary discussions among the collection development staff, "Who is Ted, anyway??" the library agrees to look at the collection to see how it relates to the collection development policy of the library.

The family is seriously interested in seeing that the collection gets to the right place, but at the same time, they want to know if they have a "find." Ted was not wealthy, and there are debts to pay. The collection development person wants to be kind, but in this case it appears that Ted was somewhat of a dilettante, and the collection as a whole was not scholastically inspired. His books are generally in good condition, but they are common, with the exception of one or two quite unusual pieces.

Does the library agree to take all of the collection? Or does it wish to pick and choose? And an economic value must be placed on the collection. So an appraiser is brought in. What does the appraiser do to satisfy all parties, (i.e., the family, the library, the government and the attorneys)?

The appraiser is hired by the family or the attorney representing the estate. That appraiser is required to see the property; to examine it for condition, degree of replacement and repair; and at the same time, compare it to other items and collections of a similar nature. The general process of an appraisal includes the following steps:

- inventory the property and determine authenticity,
- evaluate comparable sales,
- complete the appraisal and release a report.

The first thing required is to determine the size of the collection. How many items are there, and what are they both generally and specifically? In the example above, Uncle Ted was an edu-

Program Corner

Young Adult Librarian, Jane Perry, offered the Newport Public Library's first YA program this past summer. Here's what happened....

Our first YA program, "A Night of Surfing" was held at the Newport Public Library on August 25th. Local surfers Kirk Razza, Chris Lane and Frank Murphy gave surfing tips to a crowd of about 30. The surfers are on the local Water Brothers Surf Team and have competed in ESA and ASP East professional competitions. Sid Abbruzzi, owner of Water Brothers Surf Shop provided the program with local and international surf videos, and Flint Audio-Video supplied the large screen monitor and VCR. The Young Adult Department supplied the popcorn and soda, making the program a true community collaborative.

Tee shirts and hats from surf gear suppliers were given away in a free raffle, and there were plenty of surfing decals for all in attendance. Perhaps in the middle of a long, cold winter we'll bring a little summertime into the library and do it again!

cated amateur and knew some of the items in his collection. He did, however, misidentify some items, and over identified others.

Then the items have to be catalogued so that we know what is "in the box." The next step is to consider condition and restoration - not from the point of view of cataloguing, but in order to determine value. Often the appraiser looks to auction sales for a comparable item. But not all auction sales are reliable. Sometimes the auction arena is wholesale; sometimes it is retail; sometimes the sale price reflects two bidders who fought each other "tooth and nail" to secure a desired item. This "fight" is not documented in any report of sales or composite index released at the end of the year. Thus, in a yearly cumulative index one edition might go for \$40, while the same book sold for \$300, one month later. It is also possible to follow the same item over the years, in and out of the auction house to the dealer and the collector.

In a formal appraisal comparable sales are used to substantiate values on a per item basis, as well as on a collection basis. If the particular collection is mediocre, then the values should reflect this. High spots, or the best items, content-wise, as well as condition-wise, should be separately identified by the appraiser.

The collections of scholars are sometimes outstanding, but generally they have some good items and then some run-of-the-mill. If the scholar has collected beyond his retirement, some of the property can be well researched and some just there. And if the collecting continued until the scholar's death, there are often items without descriptions, and descriptions without corresponding items. The scholar may have a Charles Dickens manuscript worth \$10,000.00 and a common American edition of the same text, worth less than \$50.00, sitting all in the same area. In this case, the appraiser plays the role of curator. The appraiser cannot, however, know all there is to know about autographs, so it is the librarian (or the museum curator) and the appraiser, working together, who can jointly confirm what an object is and what it is not.

An appraisal should contain an evaluation date and the purpose of the appraisal. It should also include whether the report is primarily for probate or insurance purposes.

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READERS' GUIDE ABSTRACTS	(M)	1,495	1,995	1/83 (Indexing) 9/84 (Abstracting)
READERS' GUIDE ABSTRACTS SELECT EDITION	(M)	—	995	6/88
	(SY)	—	695	6/88
	(Q)	—	395	6/88
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Federal regulations require specific forms and signatures to go along with the appraisal. These forms should be completed by the appraiser with the assistance of the family, the specific donor, and the recipient. Form 8283 is required for gift appraisals when the fair market value of the property is deemed to be more than \$5,000, or when similar gifts made to institutions in the aggregate are valued at more than \$5,000. The form requests the donor to note the purchase price of items and when the objects were acquired. After a gift is received, the officer of the receiving institution's signature is required, so that there is no question that the property worth "x" was donated on day "y." A thank you letter should be sent for every donation. And adequate records should be kept of all donations, so that if questions arise in the future, they are easily answered.

In cases where the valuation question is problematic and subsequently addressed by the courts, the courts become the ultimate appraisers. It will not be the appraisals presented by the participants in a legal action that will determine fair market value, but it will be the judge and jury that settles the issue. The ultimate fair market value may have little, if any relationship to the final settlement, because the courts, based on trial proceedings, will decide the case on the basis of proceedings, and the interpretation placed on the law by the presiding judge.

In summary there are four conditions that all appraisers hope for:

- that collectors, donors and museums know what they have,
- that the property is described adequately,
- that the next generation can interpret the object in time,
- that the forces which made and shaped the object can be understood and explained.

John Woods is an appraiser with John A. Woods Appraisers, South Windsor, CT

BULLETIN BOARD

The Champlin Memorial Library in West Warwick has survived the crisis which closed its doors in July. The library was summarily shut

down by Mayor Kathryn O'Hare when a 1994 budget could not be agreed on by the town council, in an effort to keep the debt-ridden and cash poor town afloat. The good news is that a subsequent budget prepared by a citizens group called *We the People* was adopted by the town and provided for the reopening of the library. The bad news is that the new budget insures some drastic cuts in library services for the people of West Warwick. The FY94 budget in effect until June 30, 1994, has necessitated the elimination of two full-time and six part-time positions. In addition the library is now open 40 hours per week instead of its usual 60. Despite these strictures the library staff remains dedicated to providing the quality service they have been known for. The library is also on record as being deeply appreciative of all who wrote and called the Mayor on its behalf, especially the Rhode Island Library Association, the Department of State Library Services, the Library Board of Rhode Island, and the Cooperating Libraries Automated Network (CLAN).



The Rhode Island Festival of Children's Books and Authors will take place on October 23 and 24 at the Lincoln School in Providence.

Featured authors are Eric Carle (Saturday only), Rosemary Wells, Brian Pinkney, Natalie Kinsey-Warnock, Paul Zelinsky, Brian Selznick, Robert Alley, David Macaulay, and Chris Van Allsburg. Books will be available for sale (note that no more than three books can be brought into the Festival site), and the authors will be available for autographs. Each author will make a presentation once over the two days. Eric Carle will offer a preview of a video suitable for use with classes that shows him at work, and copies will be available for sale. At 10:30 on Saturday, Susan Bloom, director of the Center for the Study of Children's Literature at Simmons College, will review the best of this year's new books for children and young adults. In addition, Peter Rabbit will be joining us for a celebration of his 100th birthday.

This fundraiser benefits reading motivation projects in school and public libraries including the Summer Reading Program and the Rhode Island Children's Book Award along with Women & Infants Hospital. The event is pro-

duced by Women & Infants Hospital with the cooperation of the Department of State Library Services. Sponsors are WJAR TV 10 and the Providence Journal Company.



From January to April, the Rhode Island Historical Society Library is visited by school students from throughout Rhode Island. The reason for their visit is the annual History Day competition. This year's topic is Geography in History. Many of the students that have used the Society's library have gone on to win the local contest and proceed to Washington, D.C. to represent Rhode Island in the national competition.

This year students wanting to use the RIHS Library will be asked for a referral from a librarian. The resources of the Historical Society are best utilized once secondary source material has been used and certain library skills acquired. Any students interested in using the Rhode Island Historical Society Library need to be accompanied by an adult. Certain departments are open by appointment only.

Librarians are invited to call Maureen Taylor, Reference Librarian at the RIHS Library to discuss student projects relating to Rhode Island history. The RIHS Library is open from Wednesday - Saturday from 9-5:45 p.m. The Library is located at 121 Hope Street, Providence, RI. Telephone number is 331-8575. Fax number is 751-7930.



The Social Law Library To Sponsor ADA Conference

BOSTON - The Social Law Library will sponsor an educational conference entitled *The Americans with Disabilities Act (ADA), Libraries and the Law* on October 28 at the Holiday Inn in Worcester. The Library first presented this seminar in March, and it was so well received that a second offering has been planned.

The ADA is far and away one of the most complex pieces of federal legislation to appear in decades. The legal issues it raises can be subtle and elusive. The regulations defining the parameters of the ADA are in a continuous state of interpretation and consideration by the nation's judiciary and legal community.

The Social Law Library is offering this conference because it believes that libraries have not yet focused their attention on the far-reaching legal obligations and potential liabilities imposed by the ADA, and that their failure to do so could easily result in costly litigation.

The particular strength of this seminar, that can't readily be acquired from any other source, is superior legal expertise to help unravel the intricacies of the ADA. No other library organization has assembled a panel of legal experts to offer this unique blend of law and practice.

The ADA seminar will begin with an overview of Titles I, II and III of the Act by two Boston attorneys: Catherine E. Reuben, Esq. of Brown, Rudnick, Freed & Gesmer and Stanley J. Eichner, Esq., Assistant Attorney General, Civil Rights Division, of the Massachusetts Attorney General's office. Deborah A. Eliason, Esq., of Kopelman & Paige, P.C., will discuss litigation basics and the role of town counsel.

Experts from the Massachusetts Commissions for the Blind and Deaf and Hard of Hearing will demonstrate assistive devices for visually and hearing impaired patrons and employees, and discuss the attitudinal barriers toward staff and patrons.

Marianne Kotch, a consultant to the Vermont Department of Libraries, will present a plan of action for implementing the ADA in libraries. The final speakers will discuss the investigation of the formal ADA complaint lodged against the Seekonk Public Library - the first library in the nation to be investigated by federal authorities. Sharon St. Hilaire, Director of the Seekonk Public Library, and Ralph B. D'Amico, Jr., Branch Chief of the U.S. Department of Education's Office of Civil Rights in Boston and chief investigator of Seekonk, will use Seekonk as a case study to illustrate the dangers of non-compliance.

CONTACT: Kelly Haglund, Manager of Research (617)523-0018 x340



ALA Video/Library Video Network Premieres Family Literacy Tape

A new video guide for starting or enhancing a family literacy project has been produced by the American Library Association (ALA/Library Video Network).

"Close to Home: Library-Based Family Literacy" teaches the components of library-based family literacy programs featuring models from the Bell Atlantic/ALA Family Literacy Project. Sponsored by the Bell Atlantic Charitable Foundation and the ALA, it encourages establishing community partnerships as solutions to the problems of low literacy.

Librarians, adult literacy providers, basic education specialists and employee volunteers from Bell Atlantic companies have teamed up to develop library-based literacy projects in more than 45 communities.

The 24-minute video training tape, hosted by McNeil/Lehrer News Hour commentator Judy Woodruff, features examples of various models of library-based family literacy programs. It can also be used as an incentive for community agencies to collaborate on private/public literacy projects.

"Close to Home: Library-Based Family Literacy," (ISBN 1-56641-006-1) is \$79.95 and can be ordered from: ALA Video/Library Video Network, 320 York Road, Towson, MD 21204. Telephone: 800-441-TAPE.

For more information about the Bell Atlantic/ALA Family Literacy project, contact Margaret Monsour, 800-545-2433, ext. 4296.

PEOPLE

ANNE BULIN recently was appointed Children's Specialist at Providence Public Library's Smith Hill Branch.

ELIZABETH FUTAS, Dean of URI's Graduate School of Library and Information Services, has been appointed to a 13-member Library Advisory Board established by Reed Reference Publishing. Members will report on industry trends and offer suggestions on the development of new products and services.

MARILYN HOPKINS is now Children's Librarian at the Mount Pleasant Branch of the Providence Public Library.

BARBARA MACCARONE has been appointed to a Reference Librarian position at the Johnson and Wales University Library.

RICHARD OLSEN, Director of the Adams Library at Rhode Island College, is the recipient of the 1993 Emerson Greenaway Distinguished Service Award for Librarianship presented by the New England Library Association (NELA). The award is presented annually by NELA to a New England librarian who has made an outstanding contribution to librarianship.

CYNTHIA ST. AMOUR is now a part-time Reference Librarian at the New England Institute of Technology.

C A L E N D A R

OCTOBER 18: Library Board of RI, East Providence PL, 4-6 p.m.

OCTOBER 18: *Maximizing Customer Satisfaction* program for library directors, managers, staff, trustees and friends of the library with Arlene Farber Sirkin, president of Washington Resource Group Inc., a marketing/management consulting firm; Babson College, Wellesley, MA 9:30-400; NELINET/SLA members \$70, non-members \$90; registration deadline October 1; information Donna J. Hussin 1-800-NELINET or (617) 969-0400.

OCTOBER 19: Young Adult Round Table, "Reference Update - the Arts", North Kingstown Free Library, 9:30 a.m.

OCTOBER 19: *Fundamentals of Marketing for Libraries* program for library personnel with no background in marketing or interesting in a refresher course with Arlene Farber Sirkin, president of Washington Resource Group Inc., a marketing/management consulting firm; Babson College, Wellesley, MA 9:30-400; NELINET/SLA members \$70, non-members \$90; registration deadline October 1; information Donna J. Hussin 1-800-NELINET or (617) 969-0400.

OCTOBER 23-24: RI Festival of Children's Books and Authors

NOVEMBER 1: RILA Fall Business Meeting, Barrington PL

NOVEMBER 3: COLA/RILA Present Arch Lustberg

How To Talk To Your Legislator About Libraries

Stick To Library Issues

Don't dilute your presentation by bringing in extraneous discussions or observations.

Present Accurate Facts And Persuasive Ideas

Being for or against libraries is not enough. Be prepared to support your viewpoint with facts and figures.

Be Helpful

If your legislator asks a question about libraries that you cannot answer, offer to find out and follow through. Be understanding.

Put yourself in your legislator's position. Try to understand the outlook and aims of your legislator, and you will be more likely to create a reciprocal understanding about the problems of libraries.

Be Reasonable

Recognize that there are honest differences of opinion and different priorities. Never indulge in threats, which are signs of weakness and are counterproductive.

Be Quick To Give Credit Where Credit Is Due

If your legislator agrees and votes with you for libraries, make sure you adequately acknowledge that action, whether the issue passed or failed. Always commend the things your legislator does right.

Be Slow To Blame

If the Legislature does not do what you want, perhaps we failed to present the case for libraries well enough.

Be Realistic

Remember that most legislation is a compromise of some sort and almost always will be in a democratic system. Don't expect everything to go your way and don't be too critical when it doesn't work.

Follow Up

After your visit, thank you legislator in writing for receiving you and volunteer to provide information as needed.

Support Your Legislator

Participate in the activities of your political party. Help your candidate during the busy campaign days. Contribute to campaign funds. Make sure your candidate knows of your support and therefore will be more likely to listen sympathetically after the election.

Courtesy of Texas Library Association

At its 1993 Annual Conference in New Orleans, the American Library Association's governing body, the Council, adopted a resolution on "The Constitutional Protection of Library Materials, Services and Programs." In recent months, there have been efforts throughout the country to curtail and abridge, on the basis of sexuality, fundamental rights, including the essential freedom of access in libraries to materials from all points of view for persons of all ages and backgrounds. The American Library Association opposes any action that would limit library materials, services or programs to any adult or minor. The Association equally opposes any action, be it legislative, administrative or in the form of constitutional amendments, ordinances, ballot measures, referenda or otherwise, intended to curtail or restrict library materials, services or programs, or access to libraries, based upon content or sexuality. The resolution follows.

- Whereas, The publicly supported library is the only institution established to provide free and equal access to information for all people of the community it serves; and*
- Whereas, The Library Bill of Rights and its interpretations are the basic policies that guide libraries in the provision of services, materials and programs in a manner that guarantees each individual's right to access to constitutionally protected expression; and*
- Whereas, Throughout the United States there are attempts to seek legal action such as legislation, ballot initiatives, and state constitutional amendments, that would have the effect of limiting the diversity of library collections, services or programs or restricting minors' access to specific materials, services or programs; and*
- Whereas, These limitations are intended to require libraries to discriminate in favor of one set of values over all others; and*
- Whereas, Requiring libraries to limit access to minors interferes with the rights and responsibilities of parents to guide their own children in their use of the library; now, therefore, be it*
- Resolved, That the American Library Association affirms that forcing libraries to violate the principles embodied in the Library Bill of Rights and its Interpretations seriously abridges the First Amendment rights of people of all ages served by the affected libraries; and be it further*
- Resolved, That the American Library Association opposes any action that would limit the diversity of library collections, services or programs, or would restrict minors' access to library materials, services or programs, and be it further*
- Resolved, That the American Library Association opposes any action that forces libraries to set policies that violate First Amendment rights; and be it further*
- Resolved, That copies of this resolution be transmitted to all state chapters, state association intellectual freedom committees and state libraries.*

The RILA BULLETIN is published nine times per year by the Rhode Island Library Association. Managing Editor: Mattie Gustafson, Newport Public Library, Box 8, Newport, RI 02840 (847-8720), Feature Editors: Norman Desmarais, Providence College, Phillips Memorial Library, Providence, RI 02918 (865-2241) and Wendy Knickerbocker, Rhode Island College, Providence, RI 02908 (456-9605); News Editor: Frank Iacono, DSLS, 300 Richmond Street, Providence, RI 02903-4222 (277-2726); Editor & Writer: Judith Paster, 52 Seaview Avenue, Cranston, RI 02905 (467-8898); Jobline: Pam Stoddard, Government Documents Department, URI Library, Kingston, RI 02881 (792-2606); Advertising and Subscriptions Manager: Elizabeth Johnson, Cranston Public Library, 140 Sockanosset Cross Road, Cranston, RI 02920 (943-9080). A current list of RILA Executive Board Members and Committee Chairs is available in January/February Issue, 1993. Subscriptions: free to members; \$15/year in U.S.; \$20/year foreign. Deadlines: 1st of the month for features and 15th of the month for everything else. Advertising: \$130 full page; \$65 half page; \$40 quarter page; \$15 business card size. Change of address: members contact the Membership Committee Chair, Kathy Ellen Bullard, Woonsocket-Harris Public Library, 303 Clinton Street, Woonsocket, RI 02895 (769-9044). Subscription correspondence: contact Subscriptions Manager. For further information, contact the appropriate Editor. Technical Production: Verbatim, Inc., 769B Hope Street, Providence, RI 02906 (273-6930). Printing by Lewis Graphics, 1655 Elmwood Avenue, Cranston, RI 02920 (941-4444). LC 57-26438.

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