

GIFT MANAGEMENT FOR TRANSPORTATION LIBRARIES: OBSERVATIONS AND RECOMMENDATIONS

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History

- TRB LIST & History committees
 - ▣ Guidance & understanding
 - ▣ Another tool
 - ▣ Satisfy user's request

- *Gifts Management for Transportation Libraries: Observations and Recommendations for Donors and Librarians*
<http://sites.google.com/site/trblist/>

- Full report: 2 angles

- This one: one angle



Introduction

- Gifts as opportunities.... not burden
- Goal: win-win situation
- Impact on time
 - ▣ Larger gifts = more time
 - ▣ The more you do them, the easier it gets
- Communication
- Planning



Types of gift

- Archival
 - Personal or organizational papers
 - Unpublished reports or not for public distribution, letters, memoranda, speeches, photographs, etc.
 - “Gray literature”
 - May require special care in storage, handling, cataloguing, accessing, etc.
 - Some may have ownership, legal, access, copyright and reproduction challenges



Types of gift

- Non-archival materials
 - ▣ Typical library materials: books, published reports, journals, maps, etc.
 - ▣ Normally paper based
 - ▣ Variety of physical conditions
 - ▣ Perhaps requiring preservation treatment
 - ▣ Time period from the 17th century to present
 - ▣ May include electronic databases, where library assumes ownership and responsibility for data/content, maintenance and access



Types of gift

- Other materials
 - ▣ Three-dimensional items: models, tools and instruments, art objects, music recordings, awards (plaques), archeological objects, etc.
 - ▣ Some may fall within the archival category or may be better suited for a museum or historical society
 - ▣ Anything a donor may wish to donate!



Why we decline?

- Policy
- Space
- Duplicates
- Scope
- Condition
- Language
- Cost
- Format
- Context
- Terms and Conditions
- Relationships
- Insert your own reason HERE



How to decline well

- Sorry, not interested...click! Nooooooooooooo
- Need to be sensitive to life-long endeavors and emotional connection
- Extreme care needed to be polite, but firm
- Provide documentation



How to decline well

- Provide the names of other institutions, but be realistic
- Usual suspects: federal agencies, state DOTs, corporate/metropolitan agencies, university transportation libraries
- Far afield options: university science and engineering libraries, user groups, historical groups and public libraries
- “Far afield” may not be the donor's first choice and may not be as glamorous
- However, these may be the only institutions willing to accept the gift and may represent the only home where the gift will be treasured and used. Fulfilling core mission: supporting future research

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- Declining archives



Accepting Gifts

- Information
- Is it a good fit? Partial fit?
- Caution
- More information
- How far to go?
- Communication



Reasons for Accepting

- Political
- Gift + \$
- Great Collection
 - New field
 - Enhances value
- PR
- Now gift management:
 - How to make it happen?
 - How to make donor happy?
 - How to promote the gift?
 - What else can we do with it?



How to Prepare for a Gift?

- Have a gift policy
- Talk to your team
- Keep management informed
- GC: What can you do? Or not?
- Guide the donor: Hold his/her hand
 - ▣ Be firm, but flexible
- Document everything



Processing Gifts

- Enough shelving?
- Shifting of collections?
- Secure area to store gift?
- Secure location to open boxes and process them within library?
- New training and skill needed to process and maintain gift?
- When will it start and how long will it take?
- Reschedule or postpone other project(s) in order to process gift?
- Will gift be the first of (many) subsequent donations?
- Will items require preservation treatment?
- How to handle duplicates? (Plain and appraisals IRS-8283)
- Etc., etc., etc.



So you got the gift: How to finish in style

- Small gift
 - ▣ Gift acknowledgement letter (GAL) / Done!

- Large gift
 - ▣ Boxes arrive: note issues, send note (email)
 - ▣ If packing list: check Vs. contents, issues, send note
 - ▣ Boxes fully checked: send GAL / Done!
 - ▣ If taking a long time: periodic emails with updates
 - ▣ When all books processed and into collection: send note /
DONE! DONE!



THANK YOU!

QUESTIONS?

