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Dealing with Generosity: Some Thoughts on Gifts Management

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How many of us have groaned softly to ourselves when we receive a call in acquisitions and are informed that "someone wants to donate something." Worse still, an administrator informs us that they have accepted a gift on behalf of the library and the boxes are on their way, at the loading dock, or that we must personally go and pick-up the donation. Also, in most cases, this responsibility falls to the acquisitions and collection development librarian. Gifts are a fact of life in libraries and can be a boon to collection development. But the term gift is actually a misnomer as it implies something acquired without cost and that certainly is not the case with library gift programs. In this month's column I hope to give some ideas for thinking about and handling this often frustrating, episodic process. Though the experience with gifts varies somewhat from institution to institution, there are some basic mutually applicable ways of dealing with this phenomena.

To begin, you must plan for the receipt of gifts. I recently accepted the position of technical services librarian in an institution that had had a change of administrators. I'll never forget the trip to the lower storage level and the ranges that were identified to me as unprocessed gifts. It seemed small comfort to be informed that before I arrived this section had been weeded to the tune of twenty-six dumpster loads. One of my first realizations was that the incorporation of gifts into our collection actually involved all elements of the library. Aside from the role of acquisitions and serials, the cataloging, binding, and public services were needed to add their input and critique into the process. Therefore it was necessary to bring those responsible together, discuss the issues and formulate guidelines and policies with the library administration. Everyone needed to understand and adopt the philosophy and methodology involved in the solicitation, acceptance, receipt, processing and disposition of gifts.

One of the first considerations should be who decides what constitutes an acceptable gift for this institution? Gifts like everything else in life, have a dual nature. Under the best of circumstances, the value of a gift will be easy to recognize and its place within the collection easy to define. Many times, however, the librarian receiving gifts must call on colleagues or other knowledgeable individuals to assist with the evaluation and selection. You need to establish whatever committee or other vehicle is needed to complete the evaluation phase of the work. In our particular environment at Missouri, we have utilized the Bibliographic Management Committee that makes all collection development decisions for the library.

What would constitute an acceptable or non-acceptable gift? The first consideration would be the issue of duplication. **Mary Bostic** in her excellent article in volume fourteen(1991) of **Collection**

successors for such an action. Secondly, if your numbers are maintained in times of scarcity, you leave the clear impression that you certainly do not require further resources to maintain or develop your collection in the future.

This temptation can be a especially difficult for a smaller institution with limited resources, which would like to have a larger collection or something distinctive in their institution. Remember, that this gift will not only cost you to process, but will take up valuable space and will require some ongoing level of maintenance. I have heard stories of librarians approached by an administrator who is excited about the prospect of what he/she believes to be an extremely valuable gift. This can be an awkward situation for the librarian, especially when the donor is a person whom the administrator sees as a potential donor to the institution. At this point, a clear understanding of policy, formalized by a written

statement of policy will not prevent the acceptance of such a donation, but a policy will at least

"What do you think you're doing, running a business?"

Management indicates that "a library probably should not accept a gift when almost certainly 90 percent of what is offered would duplicate present holdings. The cost of processing such a gift would be prohibitive considering the small useful portion of the gift." (p.177) However, we will see later in this column that duplicates can be valuable to a library in a number of ways.

The acceptance of the gift should also be linked to a clear understanding of the role of the donated materials within the library's stated mission and collection development program. You should resist the temptation to use gifts as a substitute for purchased materials or to inflate the numbers of titles acquired during economic hard times. There are two negative impacts of such a stance. First, you will end up adding a lot of junk to your collection at a considerable cost, and you will certainly be criticized in future times by your

assert some level of control into the situation. This same posture can be used in those cases where a faculty member has personally solicited a large gift that has relevance only to his or her particular area of research.

Clearly defined policies also protect in the case of donated materials from questionable sources that due to their nature or content may cause the library embarrassment or trouble in the future. This can be especially important in publicly funded institutions and brings out another important rationale for defining the person or persons responsible for the evaluation and acceptance of the gift. This prevents a questionable item from sneaking into the library without anyone knowing it and approving its addition. This is not to indicate that the library is actively practicing censorship. Ideally, such materials should be brought before a committee so that a group decision can be made regarding

their acceptance. This way, no one is caught off guard and administrators can be ready to answer any questions or comments that may result from the inclusion of controversial materials.

Gift policies will also be of value when dealing with another type of problematic donation: the gift with certain conditions

"Perhaps this is yet another myth which needs to be exploded." — Maria Otero-Boisvert

attached to the donation. This type of donation includes large gifts given without any accompanying funds for their processing and maintenance. The problems resulting from such agreements are easy to imagine and, if at all possible, policies should state that donations should ideally be accepted without conditions as to the housing and disposition. The donation should be understood to be the property of the library. Where the gift is considered to have great value, the value must be weighed against the conditions placed on it and the library's ability of comply with those conditions.

Therefore, an institutional gift policy should at least contain the following: a) a statement of those responsible for the acceptance of donations b) the types of materials to be selected based on same principles that guide the selection process c) a clear statement of conditions and terms of acceptance, ownership, and disposition. d) a statement outlining the record-keeping responsibilities of the library with regard to federal requirements, institutional records and correspondence with donors. Ideally, donors should be given a list of the materials donated along with a letter of receipt and some idea as to the disposition of their gift.

The donor must also be notified as to the policies concerning gifts and their attendant tax regulations. It should be stressed, preferably in writing, that the library is considered an interested party in these transactions. This policy will be very important if the services of an appraiser are required to estimate the value of the donation. It should be also clearly understood that the appraisal is required to be at the expense of the donor and should be completed before the actual donation. For a further delineation of the issues surrounding taxes and appraisals, I recommend the article by **Corrie Marsh** entitled "The Library Perspective on Non-

Cash Charitable Contributions" published in *Legal and Ethical Issues in Acquisitions*. This article explains the issues in a coherent and readable manner and outlines the responsibilities of both donor and donee to be in compliance with IRS regulations.

If money is a primary consideration of the donor, the librarian should be able to suggest or provide a list of used and out-of print dealers and serial agents that purchase sets or runs of periodicals. Over the years, I have observed that if you offer the dealer option to a prospective donor, they will often return later and offer the donation again without condition or thought of compensation.

Now that your policy is developed and clearly understood at all levels, and your donation has been received, you begin the process of evaluation and processing the materials. The secret to success in this area revolves around proper organization and record-keeping that begins as the donation is received. Some institutions employ special forms that serve to remind the librarian or staff member to get the necessary information such as the donor's name, address, telephone number, and any other information the library may deem necessary for processing. This form will be especially valuable for those donations dropped at the director's office or even the circulation desk after business hours.

Ideally, as I mentioned earlier, you need to have a specific area set aside for processing. It is important to keep each donation separate at least until an inventory can be taken and a formal list of the donation can be created. Once the list is complete, the donation can be arranged in a manner most conducive to evaluation. The arrangement is often made along subject lines, so that committees, bibliographers, or even commercial subject specialists can

focus their attention on a particular group of publications. As an aside, the list can serve as an evaluation tool. We recently created a list

of damaged antiquarian materials which was submitted to a professional dealer to evaluate which titles were worth the expense of further preservation and retention. In exchange for this service, the dealer has his pick of a specified number of our

antiquarian gift duplicates which we would normally offer for sale.

The above-mentioned arrangement illustrates the wide variety of options available to the librarian in deciding what to do with those donated materials not used to replace worn or damaged library volumes, or otherwise added to the collection. Solutions for disposition include exchanging duplicate or unwanted materials with other libraries through organizational agreements such as those sponsored by ARL, AALL, and through memberships in organizations such as the **Universal Serials and Book Exchange**. As **Mary Rose Magrill** and **John Corbin** indicate in their book **Acquisitions Management and Collection Development in Libraries**: "The purpose of establishing exchange agreements is to acquire material that cannot be obtained any other way and for which exchange is a more economical method of acquisition than direct purchase." (p.227)

This statement illustrates the underlying concept that should be part of disposition of donated items. In short, the library should get something out of the materials donated or they should be thrown away. However, the benefit to the organization need not be financial. You should keep alert to notices of significant collections at other libraries or scholars working on research topics at your own or neighboring institutions. We recently donated some materials to an Ohio legal scholar working on military court martials during World War Two. We were in possession of a cache of related materials and donated to his institutional library. The benefit, in this case is good will. One must always look to the future and how such connections may benefit your institution down the road. This is the same idea behind donating unwanted gifts to your public library's annual book sale. In many cases, institutions can make agreements with foreign libraries in exchange for titles or as a

"In [the] business-like approach lies one of the keys to our survival . . ."

gesture of good will. Remember that institutions such as prisons, mental institutions, and other social service

agencies are potential recipients for selected donations.

A final option for disposal is to sell the unwanted materials to a commercial vendor for cash or credit. I must profess a preference for credit as the transaction

Profiles Encouraged:

Jack G. Montgomery, Jr.

Born: September 4, 1953, Columbia, South Carolina. I spent my first twenty-three years in and around Columbia and Irmo, South Carolina.

Residence: Columbia, Missouri. A nice little college town in central Missouri with three institutions of higher education and five major medical facilities. A great

place to be educated, or really sick.

Resume: I attended the University of South Carolina and then the University of Virginia where I pursued my Masters in Religious Studies. I received my MLS from the University of Maryland at College Park. I've worked in law libraries at the University of Virginia, University of Cincinnati, and now the University of Missouri-Columbia. I've been a member of AALL, SEAALL, ORALL and now MAALL in addition to Beta Phi Mu, Phi Mu Alpha Sinfonia, and the Charleston Conference. I'm currently the Technical Services Librarian in charge of collection development, acquisitions, serials, and government documents.

Family: My dear wife Lesley and my parents in Columbia and Hilton Head Island, South Carolina.

Proudest Accomplishment: Twelve happy years of marriage and becoming a librarian. No Kidding!

First Job: Cooking for a large barbecue restaurant. I had my own kitchen by age seventeen.

Fondest Memories: Playing in a sixties rock band, teaching/travel in India and hiking in the High Sierras.

Favorite Pastime: I'm a catalog junkie, especially book catalogs. Did I find the right profession or what!

Last Book Read: *Encountering God: a spiritual journey from Bozeman to Benares* by Diana L. Eck

Pet Peeve: People who are too afraid or too lazy to take the opportunities life offers so infrequently and then waste even more precious time engaging in petty interpersonal politics/squabbling. It sometimes appears as if the politics of the school yard merely changes form in adult life with the same cliques and meaningless competitiveness.

Hobbies: pumping iron, playing guitar/singing, antiquing, traveling, and reading.

Where do you see yourself in five years: As a competent department head who takes time to "smell the roses."

Biggest surprise: Realizing that life is a wondrous continuum of cause and effect and a real adventure after forty. Finally free of the tyranny of youth!

Single most important piece of advice: Whatever you do, whether work or play, commit yourself wholeheartedly to the venture. Don't worry about failure

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does not involve exchange of money. You will need to maintain a list of vendors along with a profile of their needs and terms of agreements. Recently, I attended the annual meeting of law librarians in Seattle, Washington. In addition to passing out lists to colleagues for possible donation, I took several lists with me as I toured the vendor display area. I approached the used book and serial vendors and presented my lists and terms including our preference for credit over cash. To date, this approach has been a very lucrative and successful marketing venture on our part.

As with any venture of this sort, there is the need for periodic evaluation of the program's methods and success. You need to ask such questions as, Is the program working as we have intended? What is the ratio of time invested to benefit received? Are the procedures and policies performing as planned, or are revisions needed? Evaluation of this type will also be required should your operational variables such as staffing, physical or fiscal resources change in a significant way.

In conclusion, I was recently describing our program to a colleague when he remarked: "What do you think you're doing, running a business?" I replied that in terms of our approach to this issue, we were definitely working in a business-like manner with the stated goal of creating the most efficient way of handling a resource (gifts and donations) in order to provide the greatest benefit to our institution. In fact, this is how we approach the entire issue of acquisitions and collection development. We are in the business of securing the best resources at the lowest cost through proficient management of our human and fiscal assets. This is what makes our form of librarianship unique and our role within the library essential. I am reminded of a comment by **Maria Otero-Boisvert** of the Mallinckrodt Library of **Loyola University** in Chicago, Illinois where she responds to a recent statement by the **ACRL Professional Education Committee**. In her response, Ms. Otero-Boisvert remarks that: "Another troubling aspect of the ACRL statement is that it persists in defining librarianship as primarily a scholarly endeavor. Perhaps this is yet another myth which needs to be exploded. The real life, day-to-day activities of a library administrator and most collection development librarians have more in common with the business world than the scholarly one." I would add that most acquisitions librarians have been aware of and have quietly incorporated business-related practices into their work for many years. As such, acquisitions and collection development librarianship has developed the attributes needed to adapt to the problems presented by ever-changing budgetary situations, institutional restructuring, and new electronic mediums. We are becoming more business-like in our approach to our profession all the time. In that business-like approach lies one of the keys to our survival in this exciting new world of librarianship. ☛

Additional Resources and Recommended Reading:

Magrill, Rose Mary and Corbin, John. *Acquisitions Management and Collection Development in Libraries*. Chicago: American Library Association, 1989.

Legal and Ethical Issues in Acquisitions (eds: Katina and Bruce Strauch). New York: The Haworth Press, 1990.

Bostic, Mary J. "Gifts to Libraries: Coping Effectively," *Collection Management*, vol. 14(3/4) (1991): 175-184.

Otero-Boisvert, Maria. "The Role of the Collection Development Librarian in the 90s and Beyond," in *Catalysts for Change: Managing Libraries in the 1990's*, (eds: Gisela M. von Dran and Jennifer Cargill). New York: The Haworth Press, 1993.