Establishing a resource center: A guide for organizations supporting community foundations
Worldwide INitiatives for Grantmaker Support - Community Foundations (WINGS-CF) - 2003

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SECTION ONE: BACKGROUND

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Introduction

This *Guide* is a resource for all organizations engaged in supporting community foundations to use according to their needs and capacity. WINGS-CF is aware of the ever-expanding amount of publications, Web sites, and audio/visual material available about community foundations, philanthropy and the non-governmental sector, and of the desire of WINGS-CF participants to acquire and use this information effectively. This *Guide* was developed to assist the organizations supporting community foundations to review, organize and better access the resource material they already own or plan to.

Organizations participating in WINGS-CF range from established organizations to emerging entities, with wide variations in budget and staff size, types of organizations served and in the kinds of information requests they receive. The activities they engage in to promote the community foundation movement are just as varied. Several organizations already maintain resource centers. We designed this *Guide* for all of you, whether your collection is highly developed and formally catalogued, or you are beginning with only a few materials.

As you work to begin an information collection or to professionalize and expand the one you have, remember that libraries are one of the oldest institutions. There is a wide network of trained specialists to assist you both on-line and locally in person. You'll find many "people-oriented" professionals who thrive on service. And they have been using computers and developing search tools longer than almost any other group. This *Guide* will lead you to some of those professionals and their resources, but you'll find more on your own with only a little effort.

Resource Center: Definition

A **Resource Center** is a unit within an organization which exists to collect, classify, process and deliver print and electronic information. In the case of the organizations participating in WINGS-CF, the content found in such a resource center will include material concerning philanthropy, the non-governmental sector, local communities and government, particularly as it relates to community foundations. It exists to serve its staff, board, and membership or constituents, and to maintain the collection as an ongoing asset of the organization. The collection may be called a "resource center", "library", "information center", or a similar term.

Why Establish a Resource Center?

To Fulfill Your Organization Mission - A resource center is a basic tool in carrying out the mission. Much of the work conducted by grantmakers and community organizations begins with information: about potential recipient organizations; about grantmaker colleagues both local and international; about technical information related to philanthropy, organizational management, tax and government regulations; about many related topics. A high quality information collection tailored to your organization is essential in serving member/constituent organizations.

To Inform Your Staff and Board - A resource center functions as a basic tool within your organization to support the work of staff and board members. The wide range of activities carried on by philanthropic support organizations requires accurate information available at all times. A resource center helps to eliminate wasted and costly search time and to produce higher quality work.

To Maintain a High Standard of Performance - The presence of a resource center shows a commitment to excellence within the organization and to the philanthropic community at large. It enhances professionalism and credibility and encourages others to look to the organization for leadership. Maintaining a resource center demonstrates a commitment to best practices in your field. In a larger sense, the entire community philanthropy movement benefits from the quality of the work of its participants.

To Ensure Access to Critical Information - All resources are not and probably never will be available on the World Wide Web. Material concerning philanthropy and the non-governmental sector was scarce as recently as 15 years ago in any format, and formal research in these fields as well as the granting of advanced academic degrees are relatively new developments. Resource centers stand as key communicators about such hard-to-find information.

To Create a Record of Your Organization - A resource center will collect its own organization's material to compile a record of activities and individuals for future reference and research. Institutional memory is a critical but often undervalued aspect of organizations. Your organization is often the only place in your country with broad knowledge and expertise about community philanthropy. As philanthropy continues to develop around the globe, resource centers will play a central role in documenting its history and ongoing work.

SECTION TWO: ESTABLISHMENT AND MANAGEMENT OF A RESOURCE CENTER

Planning the Resource Center

Commitment

Information collections often begin through expediency - material keeps piling up and something must be done with it or reference questions and requests for material start coming in. If your organization fits this description it is time to make a formal commitment. The "information center" deserves a real place in the operational structure to ensure its strategic growth.

The commitment to establish a resource center needs to originate with the head of the organization who can authorize the appropriate staff member to be responsible for its creation and maintenance. This initial step may seem obvious but it is critical to institutionalize the resource center as a distinct part of the operation and to set up a chain of responsibility.

Utility

This Guide is based on the principle of utility. Structure planning around what will be most useful for your staff, board and members/constituents and how you can be responsive to user needs. Think of their needs in terms of:

- Content - What will be in the collection?

- Access - What are the best methods to use the collection?

- Services - What types of support will compliment the collection? How proactive will the resource center be? How will its collection and services be marketed to users?

- Technology - How can it be used most effectively to interpret, deliver and maintain the collection?

Choose the practical over concern about formal library structuring and procedures. Even public and large national libraries are mindful of this important principle. Ask: What works for us? What do we need?

Budget

When it is possible, a resource center budget needs to be developed as a separate part of the operating budget. This is true even when the information function will be a part of another activity or department (e.g., communications and marketing). A budget is a classic planning and benchmarking tool which makes the project real and reaffirms the organization's commitment. It ensures that there will be a place within the organization for the resource center's needs.

Management needs to understand that the initial year's budget will usually be larger than the next few years due to one-time expenses such as cataloguing software and supplies for storing material (e.g. bookshelves, CD racks). In-kind materials and services should also be included to give a true picture of the resource center's value. For instance, if a technical consultant volunteers expertise to develop an electronic catalogue, use that person's normal hourly rate to value the donation. Remember that the initial budget is a "wish list" and will probably be modified, but the goal is to cover the basics as outlined below. Do not hesitate to include what is needed. The following are standard line items in a basic library budget:

Salaries/Benefits

If the information staff holds another position in the organization, account accurately for the portion of their time spent on the resource center. Include reimbursement for budgeted interns and consultants here.

Materials

This will, of necessity, be a best estimate the first year. Part of the role of a resource center can be to have responsibility for acquiring all resource materials for the organization to ensure efficient use of funds and to eliminate duplication (Remember that in some cases, multiple copies are necessary.). This is the time to take an inventory of all existing books, print and on-line subscriptions and other materials ordered by and for staff. A procedure for submitting such requests to the resource center needs to be written and implemented among staff.

Check publication catalogues and Web sites of philanthropic organizations (e.g. European Foundation Centre, http://www.efc.be/, Council on Foundations, http://www.cof.org/) to estimate cost for desired titles. Find out which critical documents are on-line - you can often print copies at little cost and add them to the collection instead of purchasing. See Collection Development for more.

Divide materials into one-time purchases, annual subscriptions and serial publications (e.g., directories, guides - titles issued on a regular, but not necessarily annual, basis). Subscriptions and serials are important categories because they involve fairly fixed ongoing costs which help to develop an accurate picture of budget needs.

Equipment

Start with the most basic item - shelving which needs to be sturdy with room for collection growth. Include furniture here - do you intend to create a reading/research space with tables and chairs? In addition, equipment may eventually include personal computers, printers, copy machines, document scanners, VCRs, CD burners and other hardware. When the collection is small, the resource center can share existing equipment but it is important to agree to sharing procedures with the rest of the staff. Only actual operation and the size of the organization's budget can determine when the resource center should budget for dedicated equipment. Remember to budget for service contracts for each item when appropriate.

Software

This is another area where many of the applications already in use in your office will be adequate. Cataloguing software is not necessary until a collection contains 1,000 or more items. Microsoft EXCEL, ACCESS and similar applications in your office software can be used to design a working listing as well as an on-line catalogue. When a resource center is large enough, library software is available in a wide range of utilities and prices. See Classification. Explore this item carefully to fully understand the upfront and ongoing costs when preparing the budget. Include:

- Software application with appropriate number of licensed users

- Annual service agreement for each application

- Annual technical support agreement for each application

- Training for appropriate number of staff, including cost of manuals

- Fees to participate in on-line library cataloging systems - national and regional libraries often support systems for which local collections pay an annual fee.

Technical Support

If your budget can support this item, include professional development and support (e.g. membership in a local small librarians group or in the Consortium of Foundation Libraries http://www.foundationlibraries.org/) here as well as costs connected to travel for resource center staff.

Supplies

Use basic office supplies whenever possible, planning carefully for specialized items. These include labels, periodical files, storage for electronic formats, blank videotapes and CDs and other items specific to library use. See Processing. Demco http://www.demco.com/ and Highsmith http://www.highsmith.com/ are two well-established library supply companies that offer on-line catalogues and ship internationally. It's helpful to view their on-line catalogues to develop supply costs.

Implementing the Resource Center

Staff

Staffing can be a challenge when starting out due to both budget restrictions and the difficulty of convincing management that dedicated staff is necessary for a functioning resource center. A "self-service" library is a myth. The ideal is to hire an information professional. The reality is that few proposed collections will be large enough to support a full-time librarian or, perhaps, even a part-time librarian. It is recommended that you get as much professional library support as you can when organizing the resource center. Methods to accomplish this include:

- Hire an information professional for an initial period of time and include a staff training component for those who will continue to staff the resource center.

- Hire a consultant to plan and implement the project.

- Contract for an intern from a library and information school at a university. This will require a significant commitment of supervision from the appropriate staff member.

- Arrange donated time through a program sponsored by a national or regional library association.

- Budget for appropriate staff to get basic technical training about maintaining a resource center from a local college or university.

- Another good option is to budget for several days each year for an information professional to evaluate and work with the collection and its staff to keep it on track and recommend next steps in development.

Many countries have library associations and national libraries. Contact them to see what programs they offer to assist organizations starting new information centers. Go to http://www.ifla.org/ (International Federation of Library Associations and Institutions) and click "Membership" for a directory that you can search by country.

Space

Arrange for as much space as can be obtained during the planning stage because office space, like money, is one of the two most sought-after resources. There is never enough of either one. The ideal space will allow for:

1. Adequate room to shelve and file the current collection with space to grow

2. A reading area where users conduct in-person research and reference

3. An area where materials are processed. This means an area where items to be included in the collection are held to be logged in and made ready for shelving/filing. It will probably be the office area of the person responsible for the resource center. Each item, whether purchased or free, needs to be checked against the order record and entered into the catalogue, stamped "Property of (organization name) Library", and marked with the appropriate shelf or file number/category assigned to it under the organizing (classification) system. You may want to arrange for a bookshelf here to hold items to be processed. See "Processing and Maintenance".

No matter how your organization fulfills the second and third requirements, housing the collection should take priority. If your space cannot be in a separate room, arrange shelving to create a barrier from adjacent areas to provide some quiet space. Choose sturdy shelving with adjustable shelves. The ideal is to position it so that neither light fixtures nor water sprinklers are directly above shelving and so that sun does not shine directly on materials for hours at a time. Bright light fades and damages paper and water is an obvious danger. Lighting should illuminate the shelves' contents, not be blocked by the tops of the units. The built-in bookends sold with shelving are almost always inadequate and can be removed. You will want to obtain heavy duty bookends to securely hold material because each shelf will contain a mixture of sturdy hardcover books, brief unbound reports and heavy thick reports which are often unbound.

When you are ready to choose file units, standard file cabinets without hanging files offer the best utility. Hanging file suspension structures and folders take up one-third of a drawer's space, making them inefficient for most library use where the primary need is maximum storage. You can easily remove the file suspension structures from such cabinets and obtain heavy duty bookends to support large amounts of material in standard files folders within the drawers.

When it is not possible to acquire additional shelving and files for those already full, try to provide space in a clean dry area nearby to house back issues of periodicals and other non-current but valuable material needed for research and reference from time to time. Do not use cellars, basements or hot dusty upper rooms for storage because such areas are too risky to the health of the materials. Keep in mind that paper, film and the other electronic formats we take for granted are fragile media.

Scope of Collection/Collection Development

Decide the scope of the collection - what resources will it include and what topics will they cover? First, resources are offered in many formats. The basic formats most often acquired by a small resource center include:

Printed Materials

- Monographs (single publications) - usually books and reports

- Serials (publications issued on a regular basis) - directories, conference

- proceedings, annual reports. NOTE: Be selective in acquiring new editions. To conserve budget, decide which titles can be acquired every second or third edition.

- Periodicals - newspapers, magazines, journals

- Pamphlet or Vertical Files - brochures, newspaper cuttings, programs from events, conference schedules, etc.

- Members' Documents - an important area for WINGS-CF participants. Many of you are planning to scan members' documents to form sample collections available on-

line and several have already done so. This was pioneered by the library at the Council of Michigan Foundations (http://www.cmif.org/cfindex.htm and click "Sample Documents Database" in menu). The resource center holds the hardcopy collection of originals but makes it available on-line as well as via e-mail, fax or photocopy.

Audio/Visual and Electronic Formats

- Videotapes and audiotapes

- CDs, DVDs

- Films

- Photographs and slides

- Microforms - microfilm and microfiche

Scope of Collection/Collection Development Policy

In library terms the resource center discussed here is a "special library", one of the four main library types (public, academic and school being the others). Special libraries house collections in carefully selected areas of expertise - in the case of WINGS-CF organizations, that area of expertise is "community philanthropy" within the larger field of philanthropy. It is the ability to be selective which gives special libraries their value as they collect broadly and comprehensively about a limited topic guided by staff who become experts over time.

What topics will your resources cover? A written Collection Development Policy will answer this question. Collection development can take several approaches. The collection can be designed primarily to respond to member/constituent requests about community philanthropy so that material is collected in a more limited way. Many WINGS-CF organizations take this approach, which is a natural way to begin working toward a formal resource center. A more professional approach, and one that is considerably more useful as organizations develop, is to collect material more broadly to include the following areas:

- **Community Foundations / Community Philanthropy** - collect materials comprehensively which apply to and support the organization's mission and work. This would include items such as reports from WINGS-CF, histories of the community philanthropy movement, manuals and handbooks about core activity areas for community foundations, annual reports of community foundations, regional, national and international directories of community philanthropy organizations, and news articles concerning the topic. Your collection may also include sample documents from community foundations, which would include examples of policies (e.g. grantmaking, fund development, investment), forms (e.g. grantmaking applications), governing instruments and by-laws, etc. Depending on your organization's focus, the resource center may contain the most items concerning this topic.

- **Philanthropy** - collect general information and materials on philanthropy more generally as they support the organization's mission and work. Titles such as European Foundation Fundamentals by the European Foundation Centre and the latest edition of International Grantmaking: A Report on U.S. Foundation Trends by The Foundation Center belong in this collecting area.

- **Charities, Non-profits, and Non-governmental Organizations (NGOs)** - collect materials as appropriate to enhance and develop the collection and as they support the organization's mission and work. The resource center might include statistical or narrative information about the non-profit sector in your

organization's country or region, articles or journals following trends and current issues relevant to non-profits, etc.

- **Government** - collect materials as appropriate to enhance and develop the collection and as they support the organization's mission and work. Guides to government funding and lending programs, information about co-operative programs between the organization and government units, and articles, journals or books covering public policy issues and trends are examples of items to be collected.

- **Reference** - maintain a basic reference collection, which might include standard print references such as dictionaries, telephone directories, daily local newspapers, national newspapers and specialized directories. This is standard practice in any resource center and serves the daily business of the staff and all library users well.

Virtual Libraries

A word needs to be said about "virtual libraries" - a term that refers to an on-line collection of material searched through an on-line catalogue and delivered to users via remote access. Virtual libraries maintain only small collections of original material and the main delivery methods are on-line. Printed material is transferred electronically (by scanning to create PDF (portable document format) documents or by other more advanced technologies) to be available on a Web site. This is far more sophisticated then scanning selected publications to a Web site as many organizations in WINGS-CF often do. Web sites themselves can be part of such virtual collections just as they can be in the more traditional resource center we are developing here. While an increasing number of virtual libraries exist, they require a substantial budget and investment in technology to create and maintain. At this point in time, most WINGS-CF participants lack the resources to choose this route.

It is clear that this Guide refers to a physical collection, not only documents on-line. As a key organization promoting community foundations/community philanthropy in your country/region, there is a strong case to be made for creating repositories of community philanthropy material. It is critical to capture these valuable resources to create a respected research/reference tool that serves a wide variety of users. Even when a virtual collection exists, it reflects original materials housed in a library at some location.

Acquisition - How to Obtain Materials

A procedure for ordering materials (both purchased and free) on a regular schedule needs to be developed. After the first year, although many publishers will send reminders about subscriptions to magazines, journals and serial publications like directories and annual guides, the resource center needs to maintain its own ordering record to ensure items are not missed and to use with the financial office which pays the organization's bills. Standard sources for learning of potential materials and acquiring them include:

- **Purchase** - Check materials catalogues both on-line and in print on a regular schedule.

- **Announcements** - Check "new releases" columns and book reviews in philanthropy publications (e.g. The Chronicle of Philanthropy in the US). Remember that subscriptions usually entitle the user to full search privileges of periodicals' on-line sites which sometimes have excellent archives which can also be checked for reviews and descriptions of valuable items now out of print.

- **Requests** - Staff, board and members/constituents will be able to request items through a standard procedure. In some cases, if the item is not available as a document on the World Wide Web or is difficult to acquire through inter-library loan, it can be purchased for the collection. In other cases, there will be no question that the item is important enough to buy.

- **Word of Mouth** - Listen to colleagues for tips about items the collection may want to add.

- **Collecting Your Own Organization's Publications** - Make sure to acquire two copies of any item printed and/or published by the organization. One copy should be processed and become part of the collection while the second copy is held in a separate "archive" file and never circulated. Time passes quickly and these often become the only copies on record. Such material is an integral part of the collection as well as a record of the organization's work.

- **Unsolicited Material** - Mail, e-mail and daily work on the World Wide Web will provide much valuable material to consider for acquisition. Of equal importance is the material that staff will simply bring to the resource center - encourage this practice, making sure they understand that the resource center will be highly selective and dispose of the rest.

- **Gifts and Donations** - These must be evaluated very carefully according to the collection development policy but can be a valuable source.

Ordering Materials

Do comparison shopping on the World Wide Web. http://www.addall.com/ is one of several book search/price comparison Web sites. It will compare prices for a title at 33 major dealers. You can then select the best price and order on-line. Remember that new titles, DVDs, CDs and other items now come on the secondary market very quickly and it is often not necessary to pay full price. Good sources are http://www.half.com/, http://www.amazon.com/, http://www.abebooks.com/, and http://www.alibris.com/, all of which offer hundreds of thousands of titles in numerous languages and handle rare and out of print titles as well. Some of these sites have special services for libraries clearly indicated. Materials can also be found at auction Web sites, the biggest being http://www.ebay.com/. These are worth checking before you order directly from publishers.

Quality First

Staff members need to develop skill in being highly selective in accepting and acquiring material. The collection development policy guides staff in developing a uniform collection which balances its various collecting areas. It also justifies the rejection of inappropriate material. Any resource center should reserve the right to turn down requests to acquire items not in keeping with their policy whether the request involves free items, purchase, or accepting a donation or gift.

Best practice in collection development implies focus - using the collection policy as a standard which measures all proposed acquisitions. Whether it's an unsolicited item arriving via mail or an item highly recommended by a staff or an organizational member, you need to ask the same questions. Is it within the budget? Does it fall within the collection policy? Will it be used enough to justify acquiring and storing it?

It is necessary to cull or weed the existing materials heavily before accepting them for inclusion in the resource center, especially if a collection already exists. With all collection development, use a "just-in-time" approach rather than a "just-in-case" approach. Obtain and process only material likely to be used and use an information professional's trick for the rest: They take time to find out where related information can be located to direct users to those sources whenever needed. Do not try to collect everything about community foundations or community philanthropy on the chance that someone may request it at some time in the future.

Processing and Maintenance

Small collections do not need to develop complicated processing procedures. Choose the most efficient and economical of the specialized products that library supply catalogues offer when standard office supplies will not suffice. Obtain a rubber stamp or have labels printed reading "Property of (Organization Name) Library" to prominently mark the front of each item (e.g., periodical covers, book jackets and title pages, video cases).

Depending on available space and the amount of each kind of material you have, formats can be shelved and filed together or separately. Both arrangements can work equally well for small collections. Books, videos, reports and periodicals can be shelved together within each subject area or stored separately by format type - videos in one section, publications on shelving, perhaps a small cabinet or drawer for audiocassettes, etc. When using separate shelving areas, be sure to note the location on the catalogue record (e.g., "In Video Collection").

Vertical file material can be placed in three-hole Mylar (an acid-free material - do not use plastic sleeves; they will damage the paper they hold) sleeves which can then be placed in binders or file cabinets. Each binder can be an item in the catalogue rather than cataloguing each item in each binder. If you require more than one binder for a topic, simply number them consecutively and note the number of binders in the catalogue entry. When using binders, obtain those with heavy paperboard covers rather than plastic or vinyl which will stick to publications shelved on either side and can actually pull print off of those publications' outer pages. Remember, too, that binders take up extra space on shelves so there is a trade-off to be considered.

You will need to set up a simple circulation (borrowing) system to track the items in the collection. A common method is to affix an index card containing the full citation for the item and a pocket (available from library supply vendors) to hold that card to the inside front cover of each item. When an item is borrowed, note the borrower's name and the date borrowed on the card and hold those as a record of borrowed items. An alternative is simply to keep a circulation record in a basic spreadsheet program in the computer system.

You may want to pencil in the actual cost of each purchased item unobtrusively in a standard spot like the bottom left of the title page for easy reference. Items to be added to the collection need to be logged in, classified, added to the catalogue, stamped and shelved/filed as quickly as possible.

Maintenance, too, can be a simplified routine. Refile returned items within a week, if not sooner. Filing needs to be done promptly - material easily becomes lost, forgotten or misplaced if it is not dealt with quickly. Periodicals will need to be culled (weeded) at the end of each year, some disposed of and some, perhaps, moved to a storage area. Labels will need to be made for periodical boxes for the new year. Vertical files need to be culled every few years for out of date material which is no longer valuable. Some holdings, even seemingly mundane items like press releases or newspaper articles, become classics in their field and should never be tossed. The shelved printed collection can be culled every five years. When material is disposed of, make sure the catalogue (Classification and Cataloging) reflects the change, either by deleting the item or adding a note to the entry indicating "disposed of" with the date the item was pulled if you want to maintain the catalogue as a comprehensive bibliographic record.

Services and Access

The two major functions of a resource center are maintaining a collection and serving users. The needs and desires of your staff and members/constituents will help to determine what services the resource center provides. You will also need to determine whether to charge for certain services. Special collections are almost never open to the general public and are highly selective about services provided both because of the limited staff size and because they maintain permanent collections of valuable specialized materials.

It can be helpful to monitor all enquiries and requests received - by date, user, how received (e-mail, fax, in person, telephone), topic, how handled (using existing resources or special research needed) for an initial period. The data collected is an important tool in 1) planning collection and services development, 2) justifying the continued existence and expansion of the resource center and, 3) developing information sheets about frequently requested topics.

Questions of access need to considered. Determine who, if anyone, will be able to use the collection and services in addition to your staff, board and members/constituents. Some WINGS-CF participants may eventually decide to allow use by local charities or NGOs. For each service offered, determine the level of access - in-person only, in-person and via mail and e-mail, available by telephone, by fax, etc. These are key decisions because levels of access directly affect number of staff, staff time required and, eventually, the budget.

The most common services the resource center can offer are:

- Loans and Interlibrary Loans of Material - users can request that items be photocopied or mailed/e-mailed/faxed directly to them. When something is not available from the collection, the resource center can sometimes arrange interlibrary loans. Develop an e-mail or postcard reminder form to send to borrowers whose lending period has expired.

- Photocopying - in-person users can obtain photocopies for a modest fee per page or free of charge.

- Reference and Research - Requests arriving by telephone, e-mail, fax and mail need to be answered promptly. Many questions will be fairly standard and a good resource center collection will help tremendously in answering the rest. In-person users conducting research will usually require a commitment of resource center staff time.

Classification of Materials

Appendix One of this Guide, Sample Classification Systems Used by WINGS-CF Participants, is meant to accompany this brief discussion of classification. The resource center needs a classification system to arrange and locate materials in the most efficient manner. It also needs to create a catalogue to make the collection available to users. Standard and widely-used systems, like the Dewey Decimal System, include all subject areas. They are not very useful in specialized collections with a narrow focus (e.g. community philanthropy) because most items would end up with the same number. Unfortunately, no internationally accepted system presently exists for use in classifying philanthropy material, let alone community philanthropy material.

A useful system requires several components:

- An organizing principle - numerical and/or alphabetical coding, representing subjects in the collection, which allows intelligent storage and retrieval of material and growth and adaptation of the system. The code numbers created are usually referred to as the "catalogue numbers" or "call numbers". They indicate shelving position, help users locate material and ensure that all items on the same topic are shelved together. These numbers should be clearly visible on each item and on the shelves themselves.

- A detailed list (taxonomy) of terms describing the subjects covered in the collection - a controlled vocabulary. Standard terminology is chosen to describe the subjects/potential subjects in the collection. Developing the vocabulary requires thought and patience because the choices made remain with the collection as it grows and cannot be easily changed. Terms should not overlap and should exclude one another. Examples: Use "board members" or "trustees"? Use "fund development" or "asset development"?

- A catalogue - Creating a catalogue according to this system by assigning each item a code (number) and one or more of the terms in the controlled list and creating a catalogue entry for each item.

Whatever system you choose must work equally well for all types of material, allow room for growth as more subjects are added and be able to be supported by your staff. It is not necessary to develop or adapt a formal cataloguing system for collections of fewer than 1,000 items. Refer to A Basic System for ideas.

A Basic System

Materials can be shelved/filed by broad topics (e.g., community foundations, NGOs, government) and alphabetically by author within each topic. Choose these topics carefully and make sure they are specific - do not use "General" and/or "Miscellaneous" as topics because the material filed there is virtually lost. Remember the topics should exclude one another and not overlap.

You can use Microsoft ACCESS, EXCEL or a similar software program from your office application package to create a simple database or spreadsheet document to record bibliographic citations for each item in the collection. If you have Microsoft Windows 3.1 you can investigate use of the CARDFILE application to create a small catalogue. It will accommodate several hundred records. This basic catalogue can be available on the resource center staff PC and, if you choose, shared to other staff PCs. Post it on your Web site, when you develop one, for member/constituent access. If computer access is not possible, use 3" x 5" cards to record the information and file them alphabetically by author's last name or by the first main word in the organization name for items created by organizations and companies. Such cards can be converted electronically to a cataloguing database at a future date.

Cataloguing 1) allows users to locate the material they need and 2) creates a record of the collection for housekeeping purposes. You can create the content of the records yourself by entering a basic bibliographic citation:

- Classification or catalogue number

- Author

- Title

- Edition (if any)

- Place of publication

- Publisher

- Year of publication of the edition you own

- Number of pages (only when the item's pages are numbered)

- ISBN - International Standard Book Number (if item contains one); optional

- Price - optional

- Add the subject heading(s) connected to each item

- Notes - Add any information you want to note (e.g. "three volumes", "Resource center holds two copies.", "Commissioned by (your organization name)"

You can often find such citations for the items you acquire by checking excellent philanthropic library catalogues on-line (http://www.fdncenter.org/) "Literature of the Nonprofit Sector", http://www.cmif.org/, etc.) and cutting and pasting the citations you need into your catalogue. Modify each entry as needed. Finally, a short (one sentence) abstract/summary of the item is a valuable addition.

Take the basic catalogue a step further by developing a list of terms under which users can search in addition to searching by author and title. For instance, if using Microsoft EXCEL, fields (columns) can simply be added for subject terms allowing the database to be sorted, and thus searched, by those fields.

You may want to check out a basic cataloguing database created in ACCESS by Gail Powers-Schaub, Librarian of the Council of Michigan Foundations and used by some of the Council's members. See it at:
http://www.foundationlibraries.org/cof2002/basics/index.htm

A Formal System

When your resource center is ready to move to formal classification, decide on a coding system that reflects the collection content. Choose a library cataloging software application to create a full on-line catalogue. Allow several months to plan, budget and choose software as well as train in that software. Find out what support is available from cooperative cataloging projects through your country's library associations and/or the national library. Check out http://www.oclc.com/, the world's international library cooperative, which established the first on-line shared cataloging system in 1971. That catalogue now contains over 48 million records. Find out if your library can benefit from OCLC services. Their Web site is available in eight languages.

To choose software, investigate vendor sites such as http://www.inmagic.com/ (widely used by small libraries), http://www.koha.org/ (free open source library software) and http://www.mysql.com/ (free open source database). These are currently in use by some of the organizations in WINGS-CF. All of your information formats - books, electronic media, a sample documents collection, etc. - need to be accommodated in the catalogue. Remember to take enough time to fully learn what various applications can accomplish, and their true annual costs and to understand the technology involved in creating the catalogue. Choose software right for your needs, a well-suited application neither too powerful nor too complicated but robust enough for what you want to accomplish. When the basic catalogue is complete and has been successfully tested in-house, it can be posted to your Web site. You will need to decide whether to limit its access by password protection or to make it available to anyone using your Web site.

Developing a classification system and creating an on-line catalogue are the most technical aspects of developing a resource center. But they are necessary to bring the collection to its users and, if you choose, to the wider world. Simple catalogue formats that use your existing software are completely adequate for smaller collections. If all of this seems overwhelming, step back. Take another look at the Staff section for suggestions about using information professionals at critical times.

Now, take a look at Appendix One which provides real life examples of classification systems now in use.

APPENDIX ONE: CATALOGUING EXAMPLES

The classification systems and subject headings discussed here will help to make the technical concept of library cataloging real. They are options with ideas your organization may decide to adapt for its classification/cataloging. The organizations profiled here also offer excellent support to their colleagues.

Each system takes its own approach to categorizing material. There is no "correct way" except the one that works for you. However, once a system is developed, the basic framework cannot be easily changed - that could mean re-cataloging the entire collection. It is wise to spend plenty of time considering what system of subject headings (topics) is best for your organization and to develop a scheme allowing room for growth because new topics will develop over time. There are some broadly accepted topics that all community philanthropy resource centers would agree on but language, law and custom play major roles in how we think of and refer to these subjects.

Several sample titles were selected as items that an organization supporting community foundations/community philanthropy would want to collect for its resource center. The two annual reports among the sample titles happen to be available on the World Wide Web and the web addresses are clearly cited. Remember that Web sites and their contents continually change, acquire new web addresses (URLs) and sometimes disappear. Documents in the resource center catalogue that are available through the web should be carefully considered and shelf copies printed out when the titles are important to your collection. This is especially true of annual reports which are often kept on a site for only the current year. They can be difficult to obtain after a few years, even from the organization that produced them, yet they are a particularly valuable type of record.

Classification/Cataloguing Examples of WINGS-CF Participants

Here is how the sample titles would be classified and/or catalogued by three WINGS-CF resource centers. Note that examples include monographs (one-time publications), periodical articles and annual reports.

	Organizations		
	Council of Michigan Foundations	**Community Foundation Network**	**Philanthropy Australia**
Titles/Authors	**AN AGILE SERVANT**, Richard Magat, ed.	**AN AGILE SERVANT**, Richard Magat, ed.	**AN AGILE SERVANT**, Richard Magat, ed.
	BUILDING PHILANTHROPIC AND SOCIAL CAPITAL, Peter Walkenhorst, ed	**BUILDING PHILANTHROPIC AND SOCIAL CAPITAL**, Peter Walkenhorst, ed	**BUILDING PHILANTHROPIC AND SOCIAL CAPITAL**, Peter Walkenhorst, ed
	THE COMMUNITY FOUNDATION START-UP MANUAL by Sylvia Huckerby, et al	**THE COMMUNITY FOUNDATION START-UP MANUAL** by Sylvia Huckerby, et al	**THE COMMUNITY FOUNDATION START-UP MANUAL** by Sylvia Huckerby, et al

Organization: **Council of Michigan Foundations**
Classification For: **AN AGILE SERVANT, Richard Magat, ed**

ID	683
CLASS	693 MAG
TITLE	An agile servant
SUBTITLE	Community leadership by community foundations
AUTHOR	Magat, Richard ed.
PLACE OF PUBLICATION	Washington DC
PUBLISHER	Council on Foundations
COPYRIGHT DATE	1989
PHYSICAL	x, 361 p.
SUBJECT	Community Foundations
ISBN	0-87954-332-9

Organization: **Community Foundation Network**
Classification For: **AN AGILE SERVANT, Richard Magat, ed**

Magat, Richard, ed. *An Agile Servant: Community Leadership by Community Foundations*

Classify under 111 - GENERAL ARTICLES, Concept, philosophy and characteristics of community foundations

Organization: **Philanthropy Australia**
Classification For: **AN AGILE SERVANT, Richard Magat, ed**

Title:	An Agile servant: community leadership by community foundations
Author:	Magat, Richard, Ed.
Publisher:	Foundation Center
Year:	1989
Subject:	Community Foundations - United States, Community Leadership - United States
Notes:	Includes bibliographical reference and index.
Abstract:	Commissioned under the Community Leadership Subcommittee of the Council on Foundations, the publication includes chapters on leadership, standards, donors creating capital and collaboration. It also profiles sixteen U.S. community foundations in case studies which show how critical issues are handled in community foundations.
Call Number:	520 AGI

Organization: **Council of Michigan Foundations**
Classification For: **BUILDING PHILANTHROPIC AND SOCIAL CAPITAL, Peter Walkenhorst, ed**

ID	5988
CLASS	693 WAL
TITLE	Building philanthropic and social capital

SUBTITLE	The work of community foundations
AUTHOR	Walkenhorst, Peter ed.
PLACE OF PUBLICATION	Gutersloh
PUBLISHER	Bertelsmann Foundation
COPYRIGHT DATE	2001
PHYSICAL	142 p.
SUBJECT	Community Foundations
ISBN	3-89204-563-1

Organization: **Community Foundation Network**
Classification For: **BUILDING PHILANTHROPIC AND SOCIAL CAPITAL, Peter Walkenhorst, ed**

Walkenhorst, Peter, ed. *Building Philanthropic and Social Capital*

Classify under 111 - GENERAL ARTICLES, Concept, philosophy and characteristics of community foundations

Organization: **Philanthropy Australia**
Classification For: **BUILDING PHILANTHROPIC AND SOCIAL CAPITAL, Peter Walkenhorst, ed**

Title:	Building philanthropic and social capital: the work of community foundations
Author:	Walkenhorst, Peter, ed.
Publisher:	Bertelsmann Foundation Publishers
Year:	2001
Subject:	Community Foundations, Social Capital
Abstract:	This book comprises essays on the history and spread of the community foundation movement internationally, on the role of community foundations in fostering social capital and civic engagement and on the key aspects of the day-to-day work of community foundations such as asset development, donor services and marketing.
Call Number:	520 WAL

Organization: **Council of Michigan Foundations**
Classification For: **THE COMMUNITY FOUNDATION START-UP MANUAL by Sylvia Huckerby, et al**

ID	6501
CLASS	693 HUC
TITLE	The community foundation start-up manual
AUTHOR	Huckerby, Sylvia Farmer, Lynda McLaren Moore, Margot
EDITION	4th. ed.
PLACE OF PUBLICATION	Ottawa
PUBLISHER	Community Foundations of Canada

COPYRIGHT DATE	1998
PHYSICAL	89 p.
SUBJECT	Community Foundations Canada

Organization: **Community Foundation Network**
Classification For: **THE COMMUNITY FOUNDATION START-UP MANUAL by Sylvia Huckerby, et al**

Huckerby, Sylvia, et al. *The Community Foundation Start-up Manual*

Classify under 431 - STRUCTURE AND ORGANIZATION, Starting Up a Community Foundation

Organization: **Philanthropy Australia**
Classification For: **THE COMMUNITY FOUNDATION START-UP MANUAL by Sylvia Huckerby, et al**

Title:	The Community foundation start-up manual
Author:	Community Foundations of Canada
Subject:	Administration, Community Foundations - Management
Notes:	Loose-leaf binding
Abstract:	This is an information start-up kit for Canadian communities developed with new or emerging community foundations in mind. The manual provides a range of information, from assessing your readiness, appointing your first board, and deciding on your priorities, to putting your systems in place. It also profiles the experiences of a number of community foundations across Canada, and includes a tool box containing additional resources and samples of materials developed by Canadian community foundations.
Call Number:	520 COM

An Important Cataloguing Resource

The Foundation Center
New York, New York, USA
Web site: http://www.fdncenter.org/
Contact: Manager, Bibliographic Services, e-mail: mbs@fdncenter.org, telephone: +1.212.620.4230.

The Foundation Center, through its libraries, has been collecting and organizing philanthropic material since 1956. More than 26 years ago the library developed a numeric classification scheme, patterned after Dewey Decimal System numbering, which still serves it well. A controlled vocabulary of *keywords* compliments the scheme. The full catalogue is live on-line (www.fdncenter.org/research) as *The Literature of the Nonprofit Sector*. It contains over 21,000 bibliographic entries with many giving access to the full document and many dealing with community foundations. It is updated daily. In-Magic software is used. FC's is the largest formally catalogued philanthropic collection in the world and a great resource worth studying. For instance, a small resource center could use LPNS to check for citations for some of its own material. The Center's Web site http://www.fdncenter.org/ is one of the two or three best philanthropy Web sites in existence.

Here are the results of a search of LPNS using "community foundations international" as the subject. Note that four of the entries make the full text available on-line.

1. ***Building the worldwide community foundation movement.* Ottawa, Ontario, Canada: WINGS-CF. 2000. 79 p.**

Abstract: Reports on the 1998 International Community Foundation Support Organization Meeting that took place in Miami, and separately examines the development of the movement to increase the number of community foundations in the world. Also gives brief histories of this growth in the U.S., Caribbean, South America, Europe, Middle East, Central and Eastern Europe, Africa, and Asia and the Pacific. An appendix lists community foundations in various regions.

Subjects: Community foundations; Community foundations--international; International philanthropy
Location: New York; DC

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2. **Feurt, Suzanne L. "Community foundations : the roots of sustainability".** *NGONews* **vol. 5 (December 1996) p. 1-3.**

Abstract: Advocates the development of community foundations in Central and Eastern Europe.

Subjects: Community foundations--international; International philanthropy--Eastern Europe
Location: New York

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3. **Greene, Stephen G. "Cultivating philanthropy overseas : community funds tackle local problems on 5 continents".** *Chronicle of Philanthropy* **vol. 14 (18 October 2001) p. 1, 6, 10.**

Subjects: Community foundations--international; International philanthropy
Location: New York; DC; Cleveland; San Francisco; Atlanta

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4. **Penick, George. "Eastern Europe meets the mid south".** *Foundation News & Commentary* **vol. 38 (January-February 1997) p. 15-6.**

Abstract: George Penick, president of the Foundation for the Mid South, tries to apply what he has learned in working with a regional community foundation in the U.S. to the Carpathian mountain region of Europe.

Subjects: Community foundations--international; International philanthropy--Eastern Europe; Foundation for the Mid South
Location: New York; DC; Cleveland; San Francisco; Atlanta

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5. **Sacks, Eleanor W.** ***Serving a wider community : community foundations' use of geographic component funds and other strategies and structures to cover territory.* Ottawa, Ontario: WINGS-CF. 2002. 50 p.**

Subjects: Community foundations--international
Location: New York; DC

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6. **Tully, Jane.** ***Community foundations around the world : building effective support systems.* Washington, DC: Council on Foundations. 1997. 48 p.**

Abstract: A report based on the findings of a 1995 conference of national organizations that provide assistance to community foundations around the world. Discusses whether the community foundation model as it is accepted in the U.S. is applicable across national

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experiences; what roles are played by community foundations (both those that are established and those that are emerging) in other countries; and what support community foundations need in order to succeed. Provides profiles of the organizations represented at the conference, based in Africa, Asia, Australia/New Zealand, Eastern Europe, Central and South America, North America and Europe.

Subjects: Community foundations--international; International activities; International philanthropy--analysis; International philanthropy--comparative analysis
Location: New York; DC; Cleveland; San Francisco

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7.   Walkenhorst, Peter (ed.) *Building philanthropic and social capital : the work of community foundations.* **Gutersloh, Germany: Bertelsmann Foundation. 2001. 142 p.**

Abstract: Discusses the work of community foundations from an international perspective. Contains essays on the history of community foundations, on the development of social networks and financial assets, on donor services, and on marketing. With bibliographical references.

Subjects: Community foundations--analysis; Community foundations--history;
 Community foundations--international; Community foundations--fundraising;
 Community foundations--marketing
Location: New York; DC; Cleveland

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8.   *WINGS-CF 2000 Peer Meeting.* Ottawa, Ontario: WINGS CF. 2000. 88 p.

Abstract: The events and outcomes of the 2000 WINGS-CF Peer Meeting, May 7-9, in Ottawa, Canada. WINGS stands for Worldwide Initiatives for Grantmaker Support.

Subjects: Community foundations; Community foundations--international; International philanthropy
Location: New York

APPENDIX TWO: SAMPLE CLASSIFICATION SYSTEMS

The three support organizations below have shared the classification systems that they use to organize their resource materials, including community foundation-specific material.

Sample systems

- Community Foundation Network's sample document collection [PDF 65.6KB]

- Council of Michigan Foundations Resource Files - Classification System [PDF 14.2KB]

- Philanthropy Australia - Resource Centre Classification Scheme [PDF 12.1KB]

- Philanthropy Australia - Resource Centre Subject Headings [PDF 29.2KB]

[These documents are available in the WINGS "Information and Resources" Section at http://www.wingsweb.org.]

Council of Michigan Foundations (CMF)

http://www.cmif.org/
Grand Haven, Michigan, USA
Contact:
Gail Powers-Schaub, Director, Information Services & Technology
E-mail: gschaub@cmif.org
Tel. +1-616-842-7080

CMF is a membership organization of more than 495 grantmaking foundations and corporations located in the state of Michigan in the United States. It was established in 1975 and has:

1. a well-established library whose collection includes over 2000 books, periodicals and electronic media; and

2. a Sample Documents of Community Foundations collection, a vertical file collection of over 3,000 community foundation sample documents and periodical articles.

Both the library catalogue and the documents database are searchable on-line using In-Magic DB/Text Web Publisher. Link from www.cmif.org/lib.html. This numeric classification system is one of the most developed philanthropic schemes. Community foundation material subject areas are found throughout.

Community Foundation Network

http://www.communityfoundations.org.uk/
London, England
Contact:
Fran Walker, Information and Publications Officer
E-mail: fwalker@communityfoundations.org.uk
Tel. +44 20 7713 9326

Community Foundation Network represents over 60 community foundation members in the United Kingdom. It maintains a resource collection at its offices consisting of:

1. a collection of printed and electronic media (approximately 800 items); and,

2. a vertical file of approximately 500 documents from its grantmaker members.

A cataloging database is being developed using MySQL software. Community Foundation Network is continuing to refine its classification scheme, included above. A sample documents collection, The Hub, has been scanned and is available to members as a CD-ROM and will be made available on the organization's Web site in future.

Philanthropy Australia (PA)

http://www.philanthropy.org.au/
Melbourne, Australia
Contact:
Louise Arkles
E-mail: l.arkles@philanthropy.org.au
Tel. +61.3.9620.0200

Philanthropy Australia is that country's national association of grantmakers. In 2002 it completed establishing a formal library of philanthropy and related materials. The Philanthropy Australia Resource Centre holds 1,000 catalogued items, 300 pamphlets, 300 annual reports and a collection of newspaper cuttings. In its on-line catalogue, PA uses free open source software called KOHA (http://www.koha.org/) which was developed in New Zealand for a public library. It required a good deal of customization to add new fields and refine and extend search options. The classification scheme was loosely based on that of The Foundation Center (New York) Library. (Note: most community foundation material falls into the 520-529 numbering - this scheme cannot distribute community foundation material throughout as easily as does that of the Council of Michigan Foundations.)

Through these efforts, Philanthropy Australia designed a system that will allow Australian philanthropies and related organizations to adapt it fairly easily as they develop their own resource collections. The subject headings (taxonomy or controlled vocabulary is discussed in the Classification section) are based on The Foundation Center's *Literature of the Nonprofit Sector* (http://www.fdncenter.org/) where they are called "keywords".

Catalogue records are created directly on to the National Library of Australia's bibliographic database, Kinetica (www.nla.gov.au/kinetica). The completed batch of records that make up the catalogue was brought into PA's information system in a single download. Also note PA's "Community Foundations Gateway" on their Web site at http://www.philanthropy.org.au/ which offers a wealth of information and resources for and about Australian philanthropy. It is an example of enhancing a Web site to complement the holdings and services of a resource center.