

Gifts Management for Transportation Libraries: Observations and Recommendations for Donors and Librarians¹

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Introduction

During the past ten to fifteen years, transportation libraries and information centers have come under increasing pressure by transportation officials, faculty members, researchers and practitioners to accept into their collections the researcher's personal papers correspondence and ephemera, unpublished reports, personal book collections, as well as, book collections from entire units and even libraries.

This paper provides broad guidelines, observations and recommendations for donors and librarians to develop a mutual understanding and expectations regarding donations, clarify collection's types, recommend steps for offering gifts, observations on why gifts are declined or accepted, alternative options for gift offers, and steps donors and libraries can take to prepare to ship and receive gifts.

It also provides librarians with best practices for gift management procedures, guidelines for developing gift management policies, recommendations on how to plan for the processing of gifts into a library collection and, finally, how to bring the gift giving process to a mutually beneficial conclusion.

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Background Information

It must be made clear that the term "library" is used on this paper somewhat loosely to cover state DOT, corporate and university transportation libraries and information centers. Every library is unique, and while many "transportation libraries" have commonalities, each library will have a unique mission, audience, collections, resources and policies.

What transportation libraries collect, why they collect it, and how their librarians craft their collections is very diverse. However, there are some commonalities we can address. For example, most state DOT libraries specialized in highway transportation, civil engineering materials and documents produced by their own agencies. Their collections are almost exclusively in English; with a very small number of items related to air and/or rail transportation and even less on inland waters. Interestingly, some state DOT libraries have been able to expand onto subject areas, such as: rail, transit and traffic safety, thanks to gifts. Also, we find that due to space and budget constraints, most state DOT library collections do not maintain long runs of journals or other periodicals and in cases where they do maintain long runs, these are mostly locally produced titles. In addition, we are observing the partnering of state DOT libraries with their local University Transportation Centers (UTCs) or university engineering libraries to broaden the scope of their collections. Collections are crafted mostly for practitioners and to a lesser extent for researchers.

Corporate transportation libraries for the most part are mode specific or otherwise focused to support the business goals of their parent organization. They tend to be smaller collections, may rely more heavily on electronic resources and their collections most likely do not go back more than 10 years. Their collections are crafted for practitioners.

There are few true university transportation libraries in this country. They collect on all modes, although niches within modes are emphasized due to research or teaching needs at each university. Non-English languages materials and historical collections dating back hundreds of years are maintained. These rather large collections duplicate titles held by state, corporate and other university libraries, but still manage to acquire a high percentage of unique transportation titles.

University libraries supporting civil engineering departments will most likely have a transportation-related section within their science and engineering library. For the most part these collections are not particularly deep, wide, multimodal, up-to-date, or well maintained. This is due to the fact that transportation is only one among the many subjects the librarian in charge of the collection has to develop, budget for and maintain.

Definitions

It may be helpful for the reader to understand the following definitions in order to better grasp some of the concepts on this paper and get a better idea of the type of gift a donor may be dealing with.

Archive: An archive is a collection of historical records, as well as the place they are located. Archives contain primary source documents that have accumulated over the course of an individual or organization's lifetime. In general, archives consist of records that have been selected for permanent or long-term preservation on grounds of their enduring cultural, historical, or evidentiary value. Archival records are normally unpublished and almost always unique, unlike books or magazines for which many identical copies exist. This means that archives (the places) are quite distinct from libraries with regard to their functions and organization, although archival collections can often be found within library buildings. Source: <http://en.wikipedia.org> accessed on October 7, 2010.

Gray Literature:(A) body of materials that cannot be found easily through conventional channels such as publishers "but which is frequently original and usually recent".... The U.S. Interagency Gray Literature Working Group (IGLWG)....defines gray literature as foreign or domestic open source material that is available through specialized channels and may not enter normal channels or systems of publication, distribution, bibliographic control or acquisition by booksellers or subscription agents.... Examples of grey literature include technical reports from government agencies or scientific research groups, working papers from research groups or committees, white papers, or preprints....The term grey literature is often, but not exclusively, used for scientific research. Source: <http://en.wikipedia.org> accessed on October 7, 2010.

Library: A library is a collection of sources, resources, and services, and the structure in which it is housed; it is organized for use and maintained by a public body, an institution, or a private individual. In the more traditional sense, a library is a collection of books. It can mean the collection, the building or room that houses such a collection, or both. The term "library" has itself acquired a secondary meaning: "a collection of useful material for common use." This sense is used in fields such as computer science, mathematics, statistics, electronics and biology...Libraries often provide a place of silence for studying. Source: <http://en.wikipedia.org> accessed on October 7, 2010.

Primary Source: Primary source is a term used in a number of disciplines to describe source material that is closest to the person, information, period, or idea being studied....(A)s an academic discipline, a primary source is an artifact, a document, a recording, or other source of information that was created at the time under study. If created by a human source, then a source with direct personal knowledge of the events being described. It serves as an original source of information about the topic...Primary sources are distinguished from secondary sources, which cite, comment on, or build

upon primary sources, though the distinction is often not a sharp one. Source: <http://en.wikipedia.org> accessed on October 7, 2010.

Secondary Source: In scholarship, a secondary source is a document that relates or discusses information originally produced elsewhere.... Secondary sources involve generalization, analysis, synthesis, interpretation or evaluation of the original information. *Primary* and *secondary* are relative terms, and some sources may be classified as primary or secondary, depending on how it is used. Source: <http://en.wikipedia.org> accessed on, October 7, 2010.

Types of gifts

The majority of gifts, by number of volumes, offered to transportation libraries fall between one and less than a hundred items per gift. For the most part these gifts are relatively easy to handle, but still pose a challenge especially for a small or one-person library. Occasionally, gifts encompassing hundreds or even thousands of items are offered and accepted by libraries. These large gifts may be from large personal collections or defunct institutional collections. A general rule of thumb is that the larger the gift the more complex the gift process will be and the longer (time-wise) it will take to process it into the library's collection and get it "on the shelves." In fact, some gifts are so large that it may take years and a large amount of funding to incorporate them into an established collection.

Very broadly, most gifts fall into three categories: archival materials, non-archival materials and "other" materials. It is important to note that how an item is categorized - archival, non-archival or "other" – may be library or librarian specific and cannot be generalized.

Archival materials may include the donor's personal or organizational papers; unpublished reports or reports not for public distribution, letters, memoranda, speeches, photographs, presentation slides, research notebooks, personal photocopies of articles, etc. Most of the items on this category may be considered as "gray literature" and because of their nature may require special care in storage, handling, cataloguing, accessing, etc. Some materials may even have ownership and legal issues, as well as, access, copyright and reproduction challenges. Although not normally encountered at the present time, we expect an increase in the number of transportation archival materials in electronic format in the near future, bringing their own set of new challenges.

Non-archival materials include what we would normally find in a typical library: books, published reports, journals, maps, etc. These are normally paper based, in a variety of physical conditions - perhaps requiring preservation treatment - covering a time period from the 17th century to the present. Some items may be rare or one of a kind, while others are held in just about every transportation library in the nation. Some special cases may even include

electronic databases, where the library assumes ownership and responsibility for the data/content, as well as, maintenance of its access and structure.

"Other" materials could include three-dimensional items: models, tools and instruments, art objects (paintings, sculptures), music recordings (LP or reel-to-reel), awards (plaques), menus, flags, archeological objects, etc. Some of these items may fall within the archival category or may be better suited for a museum or a historical society. However, there may be libraries willing and able to take some of these items into their collections.

What motivates libraries to decline or accept a gift?

It must be stated that librarians are attempting to do the best they can to manage their libraries, provide services and grow their collections to better support the mission of their parent organizations. In reviewing a gift for a decision, librarians must weigh in a variety of factors, plans and gut feelings to best benefit their library collections and, by extension, their users.

Therefore, once a librarian starts considering space issues, collection development, research directions, strategic plans, budget, staffing, language, time periods, project priorities, etc...one realizes that there may be many reasons that may influence a librarian's decision to accept or decline a gift.

Declining gifts

It may be somewhat difficult for a gift to properly fit in and align itself within all the library's competing interest and requirements, thus tipping the scales towards the librarian deciding against accepting a gift.

Among the many reasons for a gift to be decline we may include:

- Policy: The library – for whatever reason – simply does not accept material gifts.
- Space: The library may not have enough shelves or storage space to properly store the gift. Space issues are a big challenge for libraries. Librarians are constantly balancing limited space for "historical" materials against shelving needs for current and future acquisitions.
- Duplicates: Gifts may be items already held in the collection. Or the gift is available through the web, from a reliable source, in full text format.
- Scope: The gift is out of scope for the collection. Simply the library does not collect on the particular subject.

- Condition: Gift items may be in poor physical conditions or requiring special preservation treatment. Preservation treatment that can be expensive or unavailable to the library.
- Language: Gift materials are not in English. Most US transportation libraries do not collect items in foreign languages.
- Archival: Gift is of an archival or "other" nature. See below.
- Cost: The economic cost of accepting, processing and managing a large gift may be beyond the institution's financial resources.
- Format: The gift may arrive in an obsolete or hard to migrate from/to or maintain electronic format, or one for which the technology is no longer available.
- Context: The gift might arrive without the necessary context to give it proper research and/or cultural/historical value.
- Terms and Conditions: Donor imposes too many special conditions on the gift which the library may be unable or unwilling to comply with. Requests such as special housing, limited access, unrealistic preservation requirements, requests against institutional policies, etc.
- Relationship: Donor may not be or may not have been associated with the organization in any way. Especially important when dealing with an archival-type gift.
- Personalities: Donor may have been associated with the institution; however, may not have been a supporter of library services.

The act of declining a gift should not end with the librarian informing the donor that the institution is not interested on the gift and hanging up the telephone. Librarians should be sensitive to the fact that some of these collections represent life-long endeavors and that normally the donor or his/her representative has an emotional connection to each one of the pieces within the collection or to the collection as a whole. Thus, extreme care is needed to be polite, but firm, when rejecting the offer. Equally important is providing documented policies that clearly explaining why a gift may be inappropriate for the collection.

In addition, librarians may wish to provide the names of other institutions that collect on the subject or that may be suitable candidates for the gift. However, librarians need to be realistic about the chances of the gift being accepted somewhere else. For example, it may be very unlikely that a federal agency library would be interested in a particular gift (depending on the reasons just described), but perhaps a state historical society or archive may be a better fit for certain papers. State DOT libraries may also have difficulty accepting some gifts, but if there is an institutional connection, perhaps the agency's archives could consider the gift. University transportation libraries are more likely to accept rare, niche or non-US materials rather than anything else. Science and engineering libraries at university libraries may also be a good option for more general transportation collections, since normally, these collections are not too big,

especially if the donor has a connection to the university. Finally, as a last resort, there is the possibility of pointing the donor towards more far afield options: users groups collections, small historical groups and public libraries.

The users or small historical group's options normally may not be the donor's first choice for housing their gift and certainly may not be as glamorous as a university library or institutional archive. However, these groups may be the only institutions willing to accept the gift and, in some cases may represent the only viable home where the gift will be treasured and used, thus fulfilling its core mission: supporting future research.

Another option worth exploring may be offering the gift to a local public library if either the donor or the subject of the collection has some local connections. These connections could then be discussed, amplified and strengthen in order benefit the donor, the library and the community.

Why might libraries decline archival items?

As stated earlier, archival collections are very different than library collections. However, donors sometimes do not comprehend the difference and insist in having archival collections included into library collections. Librarians, information professionals and archivists understand that in order to properly maintain both collections these have to be kept separate.

Some broad reasons to keep the collections separate include:

- The library may be an unsecure location to store sensitive materials or three-dimensional items.
- Access to the material may have to be restricted and the library may not have the staff to support special needs.
- Archival items may require special handling or have conservation issues the library may not be able to provide or afford.
- Most archival materials are housed in boxes (another preservation issue) requiring additional shelving and/or space the library may not have.
- Processing of archival materials requires specialized knowledge, training and skills not provided as part of the typical librarian's education.
- The library may be unable or unwilling to take over institutional archival duties.
- Archival items are typically indexed or cataloged differently than library materials. This cataloguing may require special standards and software systems for adequate retrieval. This is especially true for objects/artifacts, which may require systems that record provenance, condition, ownership, valuation and similar issues museums and archives must contend with.

The best option for a librarian is to work with the donor and, if available, with the institution's archives to attempt to locate a suitable home for the gift. It is imperative for the librarian to talk to the archives staff to learn about their gift policies, if they have one, and if not, to discuss the possibility of developing one to handle future offers.

Accepting gifts

On the other hand, a librarian may be able to quickly identify the value and may require very few reasons to accept a gift into their library if the "right" items are being offered.

One important aspect in the decision-making process to accept a gift is the fact that librarians must assess the "uniqueness" of the gift and how well it will fit into its library collection. How this "uniqueness" is defined is up to each individual library, but factors may include:

- Rare books
- Breadth and depth of subject coverage
- Expensive reference materials
- Items not widely held in other libraries
- Artifactual value of the item
- Non-US coverage
- If the items was published or issued by the parent agency or by a closely related organization.

Some common reasons to accept a gift may include:

- Political. This is probably the worst reason for accepting a gift: Agency management orders the library to accept a gift regardless of any logical reason. Since there is no point in fighting this decision, we recommend waiting the three (3) years required by the IRS before de-accessing the items. (See section What may libraries do to prepare for gifts?)
- Donor offers the gift and funding. The addition of funding for processing, preservation, purchasing of equipment, digitization, construction, etc. may very well be the deciding factor for accepting the gift.
- The gift may be large enough or its content strong enough to support research in a field in which the library did not have any materials or could not otherwise easily expand into.
- The gift fills in gaps within a pre-existing collection or strengthens a collection for better coverage of a subject.
- The gift provides value to a new or to an already strong local/regional collection within the library.

- The library already collects comprehensively on specialized "niche" formats (menus, photographs, personal papers, etc) or specialized subject which the gift may help place the library in national/regional prominence.

Once the library decides it wants a gift, the process for the librarian becomes a "gift management issue" and the tone of the questions change accordingly:

- How do we make the gift process happen the fastest and most economical way?
- What can our library offer the donor to assure that we get the gift?
- What options do we have to entice the donor?
- What can we do to make the donor happy about his/her decision?
- How can we promote this gift internally and/or externally to develop library brand recognition?
- What else can we do with the gift? Having the items on the shelves is great, but should not be the end of it. Librarians must think of ways to generate additional value from a gift. These may include: exhibits, digitization projects, publications, interviews, marketing, etc.

This is a crucial stage in the gift offer negotiations. The librarian needs to portray the library as the best home for the gift, present the donor with unique added value for the gift, politely discourage the donor from continuing to look at other institutions as possible homes for the gift, and finally, reach a verbal commitment.

What can donors do to be better prepared to offer the gift?

As a donor, if you are planning to donate your collection of books, etc, to your institutional library, we recommend the following:

- Contact the library as early as possible and let them know about your interest to donate your collection.
- Return all library books to your library before attempting to give them back as gifts!
- Arrange with the library staff for a visit, discussion and review of the items.
- If you are retiring, please consider that you may have time after retiring to conduct an in-depth review of your collection and better assess its contents and research value. Don't just dump all your items on the library's front door the day before you drive into the sunset.
- Remember that you are in a much better position to assess and describe the research value of the items. Let the librarians know their value.
- Request and read the library's collection development, gift and other relevant policies, if available.

If the materials you are planning to donate fall into the archives category:

- Contact your institutional archives as early as possible and let them know about your interest to donate your collection.
- Arrange with the archives staff for a visit, discussion and review of the items.
- The donor may be asked to arrange all documents in a logical order, if possible: chronological, by project, etc.
- Separate materials that may be of a sensitive nature or that may not be ready for public viewing from non-sensitive items.
- Box materials and, if possible, provide a specific inventory for each box.
- Seek advice to determine whether or not you – as donor - hold the copyright to materials you may be donating. A decision may need to be made if as copyright holder you may want to surrender these to the institution.
- Continue discussion with archives staff as to how best to handle the gift.

As a donor, you may also wish to donate your collection to a library not related to your former institution. We recommend you spend some time researching the institutions you think may be suitable homes for your gift in order to determine if your gift would fit within their collections. You may visit the library's website or – if possible - visit the library in person, contact colleagues working at these institutions to find out about their libraries, search the library's catalog to gauge how strong or weak are they on your collection's subject, read the institution's gift and/or collection development policy (if available) and get a better picture of what they are about. Taking these preliminary steps will save you time, will focus your options to the most viable candidates and will help you produce a well researched gift offer that may make a difference when you meet with the librarians to offer your collection.

The worst thing a donor can do is not to find out about the institution he/she will be approaching to donate his/her life-long, well crafted collection. You owe it to yourself to be well prepared to save your collection for posterity.

Some general issues for the donor to keep in mind:

- Honest and clear communications during the whole process are a big key to a successful gift giving process.
- Make sure that you ask all questions you have and receive answers you understand.
- Give yourself, the library staff and the shipping company plenty of time to prepare for the pick up/delivery of the gift boxes. This is especially important if dealing with a delivery company.
- Use sturdy boxes, do not over pack them and use good quality tape to close them shut, and carefully address them.

- Prepare a master list of all the items you are offering as part of the gift. Microsoft's Excel works very well for this purpose. Include, as much of the following information on the list: title, author, ISBN, edition, etc. This is a key requirement.
- With this master list, you may then create list of items found in each shipping box.
- Do not send more or less items than agreed upon and, if possible, do not mix contents from multiple unrelated boxes.
- Decide whether or not you will be contracting a professional appraiser to appraise the collection. Appraisal of the collection should be completed before the gift is received by the library. Most libraries will not be able or willing to appraise collections.
- If the donor wishes to create his/her own book plate for the gift items, additional conversations with the library may be necessary. (A book plate refers to a small print or decorative label pasted into a book or report - often located on the inside front cover - to indicate the original owner.) Issues to discuss may include: whether or not bookplates are allowed by the library? How bookplates will be affixed to books: self adhesive or glued? Who will be responsible for affixing these? Where in the book the bookplate will be located? Allowable maximum size of the bookplate? Allowable text? Possible use of images? Allowable colors? Etc.

After going through the gift review process, discussions, negotiations and finally acceptance, the donor is now ready to start working on the shipping and delivery of your gift to the library.

The donor may have four options for the delivery of the gift to the library: the donor delivers the boxes; library staff comes to the donor's location to retrieve the boxes; commercial delivery company picks up and delivers the boxes to the library or donor delivers boxes to US Post Office and they deliver the boxes to the library.

If the donor is delivering the gift to the library:

- Same as general issues (above).
- Coordinate with library staff for date and time of drop off.
- Take time to tour library, meet staff and enjoy the moment.

If library staff is picking up boxes at donor's location:

- Coordinate with library staff for pick up date and time.
- Have materials boxed or ready to be boxed.
- Have list of materials inside boxes or ready to go.
- Make sure the items to be donated are separated and easily distinguishable from items not being donated.

If a commercial delivery company is hired to pick up the gift and deliver it to the library:

- Discuss with the library ahead of time:
 - o What company will be contracted?
 - o Who will be paying for shipping costs?
 - o Who will be paying for insurance costs? If needed/wanted.
 - o Who will be making the pickup arrangements?
- If the library is paying for shipping:
 - o Request shipping labels and library's account information well ahead of time (if needed).
 - o Coordinate with library to ascertain who will be making the pickup arrangements and provide plenty of options for pick up dates and times. Communication here is crucial.
 - o Request the name and phone number of the person within the library and/or institution who is knowledgeable about the gift and shipping procedures and who will be available to address last minute problems.
- Donor will have to box and have gift ready for pick up.

If donor is using US Postal service to deliver the boxes to the library:

- Discuss with the library ahead of time:
 - o Who will be paying for shipping costs?
 - o Who will be paying for insurance costs? If needed/wanted.
 - o How library will pay or reimburse costs.
- If the library is paying for shipping:
 - o Request shipping labels and library's account information well ahead of time (if needed).
 - o Request the name and phone number of person within the library and/or institution knowledgeable about the gift and shipping procedures in order to address last minute problems.

What may libraries do to prepare for gifts?

Librarians need to approach all gift offers cautiously, but view them as an opportunity and not as a burden. The goal is to conclude the process in a win-win and joyous atmosphere. However, if the gift must be declined it is incumbent upon the librarian to attempt to leave the donor with as good a feeling as possible and hopefully, better off than before the process started.

From the first contact, librarians need to be positive and helpful and should attempt to gather as much information as possible as to the nature of the gift and whether or not – as a whole or in part – the gift will be a good fit within the library's collection. If, it is not a good fit, inform the

donor as soon as possible and if possible provide contacts of institutions that from your perspective, may be interested in the gift.

However, if after the first impression the librarian perceives some value for the library, there are certain steps the librarian may want to take into consideration.

- Do not agree to take everything right away. A cautious approach is required.
- Ask the donor to send a detailed list of the items (Microsoft's Excel works very well) with title, author, ISBN, edition, or as much information as the donor can provide. This is a key requirement. The librarian will use this list to check the offered items against the library's catalog thus avoiding duplication (if duplicate copies are not wanted...sometimes they are). It also assures that items not wanted are not sent to the library. Especially important since later disposal of unwanted materials will incur in unnecessary shipping charges and cost library staff time and productivity. This list may be also be used as a shipping list for the boxes, as an attachment to the thank you letter the librarian will be writing to the donor after receiving the items, as a record for the donor's taxes, etc.
- If the library is interested in only part of the gift, we recommend declining the gift and informing the donor that as "whole" the gift may be more valuable to another institution. However, inform the donor that if no suitable institution is found for the whole gift and the decision is made to break up the gift, the library would be interested in accepting a particular part of the collection.
- The librarian must decide how far he/she is willing to go to acquire the gift. Some gifts have no strings, while others place the library in an untenable position. If the restrictions are too great, we recommend the gift be declined since, unusual restrictions create multiple problems later and these are often difficult to fully honor.
- Communication is crucial. Both parties need to keep each other informed of all developments at all times in order to avoid confusion and misunderstandings. Keep notes and send emails summarizing telephone conversations. Once the whole process is completed, all emails and documentation should be archived.

We recommend that all libraries include a gift policy statement or section within their library's collection development policy. This statement should be discussed and agreed upon by the library and its parent institution.

In broad terms, the document informs users – and prospective donors – how the library will handle gift offers, what kind of materials may or may not be appropriate gifts, how to contact the library, etc. The policy may be as simple as: "The library will not accept unsolicited gifts of any kind" or a very detailed document. It is up to the librarian and his/her management to

decide how to approach this. Finally, post this document on the library's website and refer donors to it when needed.

The librarian may also want to consult with the institution's general counsel to determine what the library may or may not be able to do for donors. Specific topics such as providing lists of professional appraisers, conducting appraisals (not recommended!), and discussing who will be authorized, on behalf of the institution, to sign acknowledgement letters or other documents the donor may present/require.

It is important to make sure the donor is aware that once the gift is received by the library, it becomes library property and the library can do with the materials as it see fit. This should be clearly stated within the library policies and communications with the donor (preferably via emails) before the items are shipped to the library. Librarians and donors must work hard at communicating well in order to avoid any misunderstandings before the gift changes hands.

An often neglected or poorly planned step before a gift is accepted is the spending of time to plan how the gift will be processed and incorporated into the library's collection. It does not help nor does it benefit the library or the institution if a gift is accepted and then sent to a warehouse or storage room to languish for years.

In fact, if it is a large gift, some planning and questions need to be addressed before the gift is accepted:

- Will the library have enough available shelving once the gift is catalogued?
- Will substantial shifting of the current collections be required in order to shelve the gift items within the collection?
- Does the library have secure space within its building to temporarily store the boxes?
- Is there a secure location to open the gift boxes and process them within the library?
- Will new training and skill be required for the librarians to effectively process and maintain the gift?
- When will the library be able to start processing the gift and how long will it take the library staff to process the whole gift or parts of it?
- What other project(s) already scheduled and prioritized will need to be re-scheduled or postponed in order to process this gift?
- Will the gift be the first of (many) subsequent donations of the same materials that the library will need to account for on a continuing basis?

Librarians need to be realistic and acknowledge that gifts, and especially large gifts, will disrupt library operations and space allocations and need to be prepared to change priorities and schedules.

Other processing issues to consider may include: Would any type of preservation treatments be done to the gift? Would we be using paper or electronic bookplates? Etc.

The handling of gift items that duplicate collection holding may be managed in different ways. As mentioned earlier, during the review of the gift, the librarian should ask for a detailed list of items the donor is offering. This list is checked against the library's catalog with items falling into two categories: new to the collection or duplicates (items already held by the library). Obviously, the library is very interested in acquiring the new items, but how the duplicates are handled may vary depending on the library.

The two easiest ways to handle duplicates would be to 1) inform the donor that the library will not accept duplicates or 2) inform the donor that the library will accept duplicates. Not accepting duplicates up front saves the time and the expense of processing and shipping materials that the library may dispose of right away or later. It also sets the tone that the library is not wasting anyone's time and may avoid possible hard feelings if the donor later finds out that part of the gift was disposed of without giving the donor an opportunity to locate another suitable institution. Accepting duplicates is good for a library if it wants extra copies of items on high demand, if the gift copy is in better physical condition than the library copy, if the library keeps multiple copies of institutional publications, and if the library wants to populate a branch library or wants to raise funds through a book sale.

Another issue related to duplicates is the fact that if the donor had his gift professionally appraised and if IRS form 8283 is used by the donor to claim a deduction on his/her income taxes, the library is required by law to retain all gift items for three (3) years before it can dispose of any of the gift items. It is recommended that librarians and donors seek professional and/or legal advice regarding the use of gifts to libraries as tax deductions.

What to do after the gift is received by the library?

There are some steps that need to be taken once the gift is received by the library.

- Generally, when dealing with a gift totaling a relatively small number of items, the most efficient way to complete the gift giving process is to send a gift acknowledgement letter (thank you letter) to the donor as soon as the boxes arrive into the library and its contents determined to be in order.
- For most cases, this would be the end of the gift-giving process.

However, when dealing with larger or more complex gift offers, additional steps may be required:

- The moment the gift boxes arrive, the librarian should inform the donor that the boxes were received, noting any out of the ordinary conditions. As in all communications with the donor during the gift process, this should be through an email.
- If a packing list is available, boxes must be opened at the earliest opportunity and checked against the list. Missing or extra items must be noted and this information should be provided to donor.
- Once the gift is fully inventoried a gift acknowledgement letter is sent to the donor. This letter is either signed by the librarian or an authorized institutional representative.
- Once the gift is received and inventoried, an authorized institutional representative will have to sign and return to the donor IRS form 8283, if sent to the library.
- If the processing of the gift is going to take a long time, a periodic email to the donor may be in order to let him/her know where things stand or any other information related to the processing of the gift.
- If nothing else, the librarian should inform the donor when all the gift items have been fully processed and incorporated into the library's collection and thanked once again for the gift.

For almost all cases, this last communication will complete the gift giving process.

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