building & running a small resource center: a toolkit

Prepared by the Alzheimer's Association Benjamin B. Green-Field National Library and Resource Center (2018)

Introduction (go to table of contents)

Building & Running a Small Resource Center: a toolkit was first published for the Alzheimer's Association. Chapters in our national network had expressed an interest in receiving help operating their library/resource centers. The kind of assistance that chapters wanted varied, ranging from a list of the best books, videos, and Web sites to how to evaluate or market the resource center. Additionally, chapters said that they were interested in some of the fundamental aspects of starting a resource center from scratch, and in setting resource center policies.

At the same time, we received questions from the public about running resource centers and decided the toolkit might benefit other organizations. For this reason, the toolkit has been revised for a broader audience. *Building & Running a Small Resource Center: a toolkit* includes information useful to any organization interested in building and running a small resource center.

As a medical library, we have provided examples and illustrations that draw from the field of health care. Such agencies as nursing homes, assisted living facilities, senior citizen centers, voluntary health agencies, and rural or small hospitals may find the toolkit especially useful. However, any nonprofit or for profit organization will benefit from the steps involved. The toolkit is written for staff and volunteers, and anyone with or without a library background.

Building & Running a Small Resource Center: a toolkit is in 7 modules. The modules cover the major aspects of building and running a resource center. They provide, for example, guidance for agencies wanting to start a small library from scratch. They also help resource centers set policies and procedures, like what to do when materials are not returned or how to manually check out and check in materials. The toolkit has short cuts, tips, and techniques for running a resource center smoothly. Additionally, it covers such technical aspects as the role online catalogs and social networking can play in setting up a resource center. It also provides information on virtual libraries. The toolkit can help keep track of what the library does and centralize information in one place.

How to use the toolkit

Preview the contents first to get an idea of the topics covered. You can follow the toolkit in the order it is presented or pick and choose from the selection of modules. For example, an agency may decide to build and organize a pamphlet file. In this case, Module 3 may be one of the principle modules you focus on. Work though the discussions and exercises. Pay attention to the sidebars and HINTS, and the resources at the end of each module. Above all, remember that the toolkit consists of guidelines, not requirements. It is about flexibility and using your own creativity. Feel free to modify any recommendations to fit your agency's needs.

Use the Overview below to help keep track of where you are. Blank spaces are available throughout the toolkit for discussion and note-taking.

The terms "library" and "resource center," "organization" and "agency," are used interchangeably throughout the toolkit.

Table of contents

Overview

View a snapshot of the project. Consider these steps when building a resource center.

Step 1 – Define and interview your customers to get an idea about the kind of resource center that is needed.

Step 2 - Write a mission statement and a collection development policy.

Step 3 – Examine what you have and sort it.   Put like items or multiple copies together. Discard items that you do not want to keep. Do not spend time organizing materials you are going to get rid of anyway.

Step 4 – Decide on an organizational method or methods. You may want to use one method for certain types of materials, or use different methods depending upon what you have in your collection, your space restrictions, access to the materials, or the like.

Step 5 - Test your organizational method/s. Organize some materials using the system you have chosen. This can vary, but 15-20 items is usually a good start. Ask a few of the people who will be using the system to try it out. Revise the system as needed.

Step 6 – Choose the type of catalog or circulation system you want (manual or online). Purchase the necessary supplies or software. If you have chosen an online system, give yourself time to explore the software and feel comfortable with it before entering data.

Step 7 – Buy new materials (pamphlets, books, videos, and the like); add them to the collection and to the electronic catalog.

Step 8 – Keep track of what you do as you go and establish policies around use.

Module 1

A. Why build a resource center

A resource center is an organized body of information that supports the mission of the organization and a community of users with a common interest. It provides a systematic method of arranging materials, and allows quick and efficient ways of retrieving them. A well organized resource center can help reduce duplication and unnecessary spending. It can be a center for information networking and end-user training. It can also provide organization-wide leadership in areas of expertise and represent the organization in professional activities. [1][2]

Write down some initial thoughts on why your organization should have a resource center and what the advantages would be.

Notes:

B. Who should be involved?

You may be the staff member or volunteer in the organization whose idea is to improve the resource center. You may have been recruited by a committee to start one from scratch. Either way, you are leading the effort to improve information services in your organization. Begin with a cooperative spirit. Work collaboratively rather than alone. If you can, involve other people in the organization and find ways to keep their support.

First, interview such staff as managers, social workers, nursing and direct care staff, chaplains, volunteers, or the CEO. Ask them what information they typically look for and how they find it. Do they currently have materials in their offices? Would they agree to centralize them in one location?   If there is a library already, ask what they use it for, and if there have been problems finding what they need.   Do they use the library in person, by phone, or email and what services would they like to see offered?   If the resource center serves the public, talk to them too or ask them to complete a survey. The information you gather will go far in helping to plan a more efficient resource center of materials, space, and services. [1][2]

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[1] Porter, K. *Setting up a new library and information service.* Rollinsford, NH: Chandos, Publishing USA, 2003.

[2] St. Clair, G.; Williamson, J. *Managing the new one-person library.* New York, Bowker-Saur, 1992.

Let people know what you are doing as you go. Place regular notices on the organization's intranet or bulletin boards and in the newsletter about where things stand and plans for the completion date. Set up a wiki or blog. Invite people to chat about it and have an open house when it's done. Go out of your way to personally thank those you have interviewed or have helped in any way. Report your progress to your manager or committee regularly. Tell them what you are planning and get their feedback.

Module 2

A. Defining the resource center

When you are ready to define your resource center and set parameters, use the space below to jot down a few thoughts about how you want it to function. Then complete the exercises on writing a mission statement and developing a collection policy.

What do you want your resource center to be?

What do think your audiences' expectations are?

What is your definition of a resource center?

"Something or someone to turn to for help?"

"A place that houses relevant information?"

"A place where families and professionals have access to library materials and information?"

B. Developing a mission statement

What is a mission statement?

It is said that a good mission statement explains why an organization exists and what it hopes to accomplish. Entities like libraries run more smoothly with mission statements. The purpose of this section is to help you write a mission statement for the resource center. First, look at the definition of a mission statement below. Then consider the answers to a few questions. Finally, examine a few sample mission statements. These exercises should help you formulate your mission statement.   Make sure it is on track with the mission of your organization.

Discuss the mission statement.

A mission statement is a declaration of business that includes what the resource center should and should not be doing. It contains a description of the users, their needs, and the organization's vision, values, or purpose for the resource center.

> What audiences or groups will your resource center serve (residents of a nursing home or assisted living facility, professional or family caregivers, persons with a certain disease, elders in general, the public)?

> What are the needs of the groups served (overviews of topics, facts, statistics, referrals)?
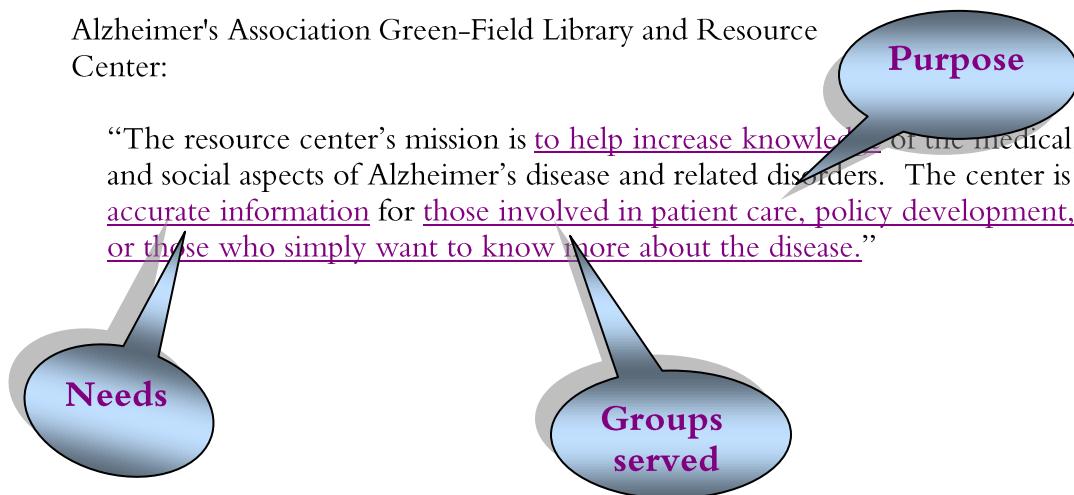
> What is the purpose of the resource center (inform, educate, support)?

Sample mission statements

Search the internet for medical library mission statements. How are they alike? How do they differ? Are there elements that you might incorporate into your mission statement?

Alzheimer's Association Green–Field Library and Resource Center:

Purpose

> "The resource center's mission is to help increase knowledge of the medical, clinical, and social aspects of Alzheimer's disease and related disorders. The center is a source of accurate information for those involved in patient care, policy development, research, or those who simply want to know more about the disease."

Needs

Groups served

7

Write the mission statement

Using the information from the exercises (the purpose, the needs, and the groups served) write a mission statement for the resource center. Again, make sure it is consistent with the overall mission of the organization. Share it with staff and the organization's board if there is one. Optionally, make copies for display in the resource center.

> "The mission statement should be short enough to fit on a T-shirt."
> Peter Drucker

C. Developing a collection policy

A collection development policy is an extension of the mission statement. It includes specific information on how to meet the needs of those using the resource center and is a guide to what will be included in the materials collection. There are good reasons for adopting a collection development policy; some of them include:

- Helps the resource center to operate more smoothly
- Allows you to prioritize the use of time and money
- Allows you to justify the inclusion or exclusion of certain materials
- Informs others about what materials you would have in your center
- Informs others about how you might help them

Writing the policy

Many resource centers create a separate document for the collection development policy; others just extend the mission statement. Collection development policies vary in their approach and detail. Some are as simple as outlines or bullet points, others are narratives. Collection policies are individually tailored to the organization. They can be general ideas about what to include in the collection or specific policies. For example, some organizations may choose to include such policies as whether to maintain a pamphlet file. Other organizations may want to include a statement about whether they will be part of a network of similar offices or agencies and share resources among themselves.

One way to write a collection development policy is to use the criteria below as your guide. The Internet is another source for finding collection development policies. Sometimes organizations use words like "scope" or "coverage" when they talk about collection development. Additionally, basic criteria and resources are included at the end of this section. Whichever policies you choose to follow, feel free to mix and match criteria and adapt them to your needs. Incorporate what you have learned from your interviews. Then, in a separate document or in the space below, write the collection development policy for your agency. Make sure it fits with the organization's strategic plan. Share the policy with staff and the board, if there is one. Optionally, make copies for display in the resource center.

Criteria

The following criteria are basic elements that could be included in a collection development policy. The statements after each criterion are for clarification. They are examples of the wording that could be used. Think about each statement. Adapt it to fit your objectives, re-write it according to your goals, or substitute another criteria altogether.

• Value: materials will be chosen based on their information, educational interest, or scholarly merit.
• Scope and coverage: materials will be purchased in the following subjects (list them) and depths (minimal, basic, comprehensive, research level). We will not buy _____.
• Formats: the collection will include books, videos, pamphlets, _____, and _____. We will not purchase in the following subject areas or formats _____. We will not purchase materials over $_____.
• Balance: we will buy materials that serve the diverse needs of our community, including language materials, materials for children, teens, and elders.
• Language: we will buy materials in these languages: _____.
• Regional interest: we will /will not seek or accept the works of local authors.
• Alternate access: we will/will not purchase frequently requested materials.
• Cost: we will/will not make cost a consideration in selection.
• Selection tools: we will consult staff, publisher's catalogs, bibliographies, frequent requests from users.

Resources

Writing a collection development policy. IN: *Idaho's Alternative Basic Library Education (ABLE) Program.* http://libraries.idaho.gov/able. Accessed February, 2010.

Collection development manual of the National Library of Medicine. http://www.nlm.nih.gov/tsd/acquisitions/cdm. Accessed June, 2018.

Write the organization's collection development policy

Module 3 - Activities in operating a resource center
(<u>return to table of contents</u>)

With a written mission statement and collection development policy, you have accomplished a great deal. Congratulations! Now it's time to look at the activities of the resource center to decide which programs and services you will offer. The following activities are the key functions to consider when operating the center. To learn more about what is involved in resource center operations and write policies for helping it run smoothly, consider each activity below. Read the guidelines, follow the discussions, and complete the exercises.

A. Choosing what to buy

Follow these guidelines when buying materials for the resource center.

- Keep a list of recommendations from staff, professional colleagues, local and national experts, or the public you are serving.
- Get on trade association mailing lists; they often have catalogs or newsletters with written reviews.
- Check reviews in trade magazines.
- Time does not allow you to read every book or preview every video, but some publishers have the kind of reputation that can be trusted no matter what they publish. Get on their mailing lists. For example, <u>Health Professions Press</u>, <u>Mosby</u>, <u>Springer</u>, <u>Terra Nova</u>, and <u>Video Press</u> to name a few in the healthcare field.
- Consult references at the end of professional articles. Buy what the authors are citing.

B. How to buy

Browse for materials or verify order information at <u>WorldCat</u> (<u>www.worldcat.org</u>). Search for materials in book, CD, DVD, and articles. WorldCat is free and contains 1.5 billion items and connects you to the libraries and services of more than 10,000 libraries worldwide.

Book and journal subscriptions

- Buy direct from the publisher. This is especially true for journals and magazines.
- Order from <u>Amazon.com</u> or <u>Barnesandnoble.com</u>.

- Order from local book stores.
- Order from established book vendors Majors (healthcare) and Baker & Taylor. You will need to make sure they will sell to organizations in addition to libraries and bookstores.

Articles

There are several ways to get copies of journal articles for the resource center. Some are free and some are not.

Free: PubMed is a service of the U.S. National Library of Medicine in healthcare that includes over 17 million citations from MEDLINE and other life science journals for biomedical articles back to the 1950s. It includes links to free full text articles from PubMed Central and the publisher when available, and other related resources.   Free citations are marked with special icons.

Search your topic then look for *Free article*, *FREE* in PubMed Central, or the publisher's icon for free access or to purchase.

Free full text

Peer-reviewed journal articles in allied health and other areas can be downloaded for free at Web sites like Highwire.com. Some publishers provide free online access to the entire article, provided you buy a subscription. An emerging group of publishers are those who provide free access (also known as "open access") to their articles with no strings attached. Open Access & Scholarly Publishing, from the U.S. National Library of Medicine online is a portal for identifying and locating open access journals in health care. The Directory of Open Access Journals lists nearly 3500 free journals in all subjects. Additionally, you can find free articles on the Internet by searching the author's name or title in a search engine like www.Google.com, AlltheWeb.com, or Ask.com

Organizations can visit their local libraries. Local libraries will locate an article through interlibrary loan, which may or may not be free of charge.

Fee: More common than open access is the practice of charging a fee for an article. Sometimes you can buy articles directly from the publisher's Web site. In the healthcare field, these include, for example, Lippincott, Williams & Wilkins which sponsors LWW Online at http://www.lwwonline.com, and the American Psychological Association sponsors APA Online at www.apa.org/psycharticles). In other cases, publishers sell their articles online through third parties such as Ingenta.com at www.ingenta.com and ScienceDirect at www.sciencedirect.com. Whether sold by the publisher directly or through a third party vendor, the fees usually run from $15 to $40 per article, with $25 – $30 being about average.

Abstracts

Many journal publishers and third party vendors archive abstracts for free on their Web sites. PubMed is a database that also provide free abstracts. These databases are searchable by title, author, keyword, or subject and available for viewing and printing. In addition to providing the article citation, abstracts can contain a great deal of useful information, author contact information or even the answers to reference questions.

Coverage

Article and abstract coverage online varies from publication to publication. Some publishers will provide as many as ten years of online coverage, others will furnish only the most recent year or the most current issue.

Vertical file materials

Resource centers keep copies of factsheets, pamphlets, clippings, and booklets in vertical files as the core collection or to supplement their book or magazine collection. These are useful materials but not important enough to include in the regular collection. Typically these resources are easy to store, provide talking points or a snapshot of a topic of specific information not easily found elsewhere. If you know the title of a pamphlet, contact the publisher. Otherwise contact healthcare associations and other organizations. Many have Web sites and list brochures in special sections such as "Publications." You can also search the internet on such words as "pamphlet" or "brochure" and the subject area.

Best Practice: To find pamphlets on the Internet, use these and related search strategies at Google or AlltheWeb.com.
- pamphlet brochure aging (finds pamphlets on aging)
- pamphlet brochure diabetes (find pamphlets on diabetes)
- pamphlet brochure heart disease (finds pamphlets on heart disease)

Resources

Vertical file index. New York, NY: H.W. Wilson Co., 1955- . Issued six times a year.

A general index to pamphlets and brochures available at many public libraries. https://www.ebsco.com/products/research-databases/h-w-wilson-databases. Accessed June 2018. You can often find it at a large public library.

Multimedia

Multimedia kits contain materials on CD, videos or DVDs, with overheads, handouts, or accompanying manuals. There isn't one index or database containing the titles of all the multimedia kits published in healthcare or other fields. They are typically included in publishers' catalogs or on the publishers' Web sites. You can also find them on healthcare Web sites, through educational bibliographies, and advertized in healthcare and trade publications. There isn't an index for CDs, VHS, or DVDs either. However, you can find them on services like WorldCat. You can purchase them on Amazon.com, Barnesandnoble.com, Borders.com, at local bookstores, or through well-established book vendors Majors (health) and Baker & Taylor.

C. Organizing the collection

A well organized collection will go far to help visitors find what they need and staff and volunteers to re-file materials. This section will help you make some decisions about how to organize the resource center collection by numeric, alphabetic, subject, color code, or subject/numeric classification systems. Some organization collections are small and do not need a sophisticated arrangement or even classification numbers (more commonly known as call numbers). Other collections contain many items and good organization is critical to making good use of the materials.

Examine what you have and sort it. Put like items or multiple copies together. Discard items that you do not want to keep. Do not spend time organizing materials you are going to get rid of anyway.

When there is a vertical (pamphlet) file.

Establish a filing system in which pamphlets, clippings, or other ephemeral materials are organized by subject. Create a master list of subject headings before filing pamphlets, brochures, clippings, and the like. Keeping track of the headings is critical to maintaining consistency and logic. For instance, establishing the subjects "continence care" and "assisted living centers" ahead of time, will help prevent making an additional folder, and filing continence care articles under "incontinence," or assisted living center pamphlets under "residential housing." Create the master list of subject headings using the index of a reliable textbook, a thesaurus, or taxonomy in the subject area.

Classification and call numbers (Does it make sense to others?)

Classification is a term used in libraries for describing the organization and arrangement of books, videos, and other items in the collection. When considering a classification system it is good to choose one that fits the size and scope of your collection. If staff and volunteer time is limited or the collection is very small, choose a simple classification system. If you have a collection that contains hundreds of items, choose a classification that is more sophisticated, flexible, and expandable.   Classification usually, but not always, includes the assignment of <u>unique</u> call numbers to each item. A unique number identifies a particular item and helps the visitor find it on the shelf.

The systems below cover a range of classifications from simple to complex. Review the systems. Feel free to imagine how you might customize them to fit your needs. Use the space provided to decide which classification system is best for your resource center.

Classification systems

- **Numeric (accession number):** In this classification system, give a number in accession to each item in the collection starting with the number one. When new items arrive, assign the next numbers. For call numbers, label the spine of each item with their unique number and shelve the materials in numeric order. In this system, you would not run out of unique numbers, but the numbers could become very large and hard to fit on to a spine label.

  Use the space below to jot down a few reasons why this classification system might or might not work for your organization. Ask what are the pros and cons of the system? Would staff and visitors be able to access the collection independently?

   Notes:

- **Alphabetical:** In this model, group the material by the author's last name in a straight A – Z arrangement. Label each item with a unique call number. Create a call number scheme that makes sense to you or try using the following scheme: a. take the first three letters of the author's last name, b. take the first word in the title or a few letters of the first word, and c. add the year and copy number. For example, let's say you have several copies of Sam Fazio's book, *The enduring self in people with Alzheimer's disease: getting to the heart of individualized care.* The call numbers might look like this:

Faz   Faz
Endur   Endur
2008   2008
c. 1   c. 2

In this system, you could run out of unique call numbers if Sam Fazio authored a different book beginning with the word "enduring." However, you could add another element, such as the second word in the title as a work-around, or a different year of publication. For example the call number Faz Endur 2009 is still a unique number

Use the space below to jot down a few reasons why this classification system might or might not work for your organization. Ask: what are the pros and cons of the system? Would staff and visitors be able to access the collection independently?

Notes:

- **Subject:** Begin by creating a master list of subject headings or subject areas. In this scheme you would arrange the materials first by the subject area and then by the author's last name on the shelf. For call numbers, use a. the first three or four letters of the subject heading, b. the author's last name, and c. the year. Let's say the subject area for the book titled *The Alzheimer's action plan: the experts' guide to the best diagnosis and treatment for memory problems* by P. Murali Doraiswamy is "Caregiving." The call number might look something like this: CARE
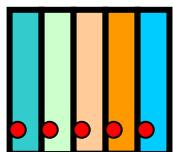 Dorais
  2008

In this classification, the chances of running out of unique call numbers seem likely if an author has written many books in the same subject area. On the other hand, it would allow all the books on a subject to be together. But what if a book is on more than one topic?

Use the space below to jot down a few reasons why this classification system might or might not work for your organization. Ask: what are the pros and cons of the system? Would staff and visitors be able to access the collection easily?

Notes:

- **Color coded by subject**: Begin by creating a master list of subject headings using the index of a reliable textbook, thesaurus, or taxonomy in the subject area. Assign colors to the subjects, one color per heading. Affix colored dots to the items according to their subject as shown in the illustrations below. Shelve the items alphabetically by author's last name in a section that is designated for that color. Create a color key or legend for display so visitors and staff can glance easily at the colors and the corresponding subjects.

Red = Alzheimer's disease   Yellow = Caregiving

Use the space below to jot down a few reasons why this classification system might or might not work for your organization. Ask: what are the pros and cons of the system? Would staff and visitors be able to access the collection easily?
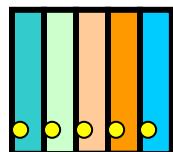
Notes:

- **Subject and numeric**: This model involves major classifications like the Dewey Decimal Classification (DDC), Library of Congress (LC), or the National Library of Medicine (NLM). In these systems, materials are arranged by subject areas, where subjects are separated with a number rather than the word describing the subject. Call numbers are alpha/numeric and constructed from published schedules and tables. In

these systems, you would never run out of unique call numbers. See the box below to read more about how call numbers are constructed.

Library of Congress and National Library of Medicine classification schedules are free online at http://www.loc.gov/catdir/cpso/lcco and http://wwwcf.nlm.nih.gov/class. Dewey Decimal summaries are free at https://www.oclc.org/en/dewey/features/summaries.html. DDC schedules are for sale at http://www.oclc.org/dewey/versions/ddc22print/default.htm.

In the subject and numeric classification scheme, the call number has a second line containing a combination of letters and numbers called the Cutter number. The Cutter number represents the author's name and title. These numbers ensure the items are arranged in order on the shelf within a classification. Cutter tables are free at http://203.241.185.12/asd/board/Author/upfile/abcd.htm.

How call numbers are constructed.

Call numbers are divided into parts. Each part means something. For example, *Best Friend's Book of Alzheimer's Activities* by Virginia Bell has been assigned an NLM (National Library of Medicine) call number, WM 450 B435v 2008 c. 1

WM 450   represents the alpha/numeric classification for the subject Activity therapy
B435b   represents the author's number for Bell and the first letter in the title.
2008   is the publication year
c. 1   is the copy number

Bending the rules. Classification numbers can change. The National Library of Medicine changed Alzheimer's from WM 220 to WT 155 in the late 1990s. Some libraries decided to keep using WM 220 instead of changing all the call numbers in their collections. Consistency is sometimes more important than convention. Organizations can bend the rules for local customs.

Will staff or volunteers need to construct the call numbers?

No, there are free resources to help find the call numbers for books, videos, and other materials.

Resources to help you find call numbers

It's okay to use another institution's call numbers, should you prefer not to use the classification tables and schedules. NLM numbers are available through LocatorPlus. LC and DDC are general classifications and can be found through the Library of Congress Online Catalog. Search by ISBN (International Standard Book Number), title, or author to find records that match the items in your collection. When you have identified the record, click on the title and scroll down or look for the "Full Record" to get the call number.

A word about classification numbers: assigning classification numbers is one function where mixing and matching does not work well. Keep track of the classification system you are using for any given collection and stay with it. In general, don't mix call numbers from Dewey Decimal with Library of Congress or National Library of Medicine within the collection.

Online DDC Catalogs (DDC) and United States Library Directories and Major Libraries (LC, NLM, and DDC) identify many online catalogs belonging to libraries where you can find call numbers. State libraries have online catalogs too at http://www.libraryspot.com/libraries/statelibraries.htm

Best Practice: ISBNs are printed on the back side of the title page in a book. Video ISBNs may or may not be printed on the label. Try searching a Web site like Amazon.com to find ISBN numbers.

Journals and magazines use ISSN's (International Standard Serial Number).

Use the space below to jot down a few reasons why NLM, LC, or DDC would or would not work for your organization. While you are deciding, ask: what are the pros and cons of the system? Would staff and visitors be able to access the collection easily?

Notes:

Document your organization's classification system

Next , use the following space to document your classification system. Remember that the classification system you choose is not as important as being consistent in your use of it. These include the assignment of the call numbers, the arrangement of materials, and the documentation reflecting your method and local customs.

The classification system our resource center uses / will use is (circle one): numeric, alphabetical, subject, color coded by subject, subject and numeric, other. We will incorporate the following local customs:

Notes:

We have chosen   _____   to be the classification system for our resource center.

Module 4 - Using the Collection ()

The Catalog, Circulation, Reference, and Collection Maintenance

are core functions of the resource center. Establishing policies and procedures for these activities can make the resource center easier to run and more efficient. This section provides some guidance.

A. The catalog

If the resource center collection becomes too large to be able to find materials, a library catalog can help. A library catalog is an effective way for people to search the collection without having to browse the shelves. One kind of catalog is not necessarily better than another. Some of the simplest catalogs work well. At the same time, some catalogs are more efficient than others, easier to maintain and to search. Although catalogs come in varieties, they typically have one thing in common. They all contain cataloging records of authors, titles, subjects, and other data for all the books, videos, and other print and multimedia materials in the collection.
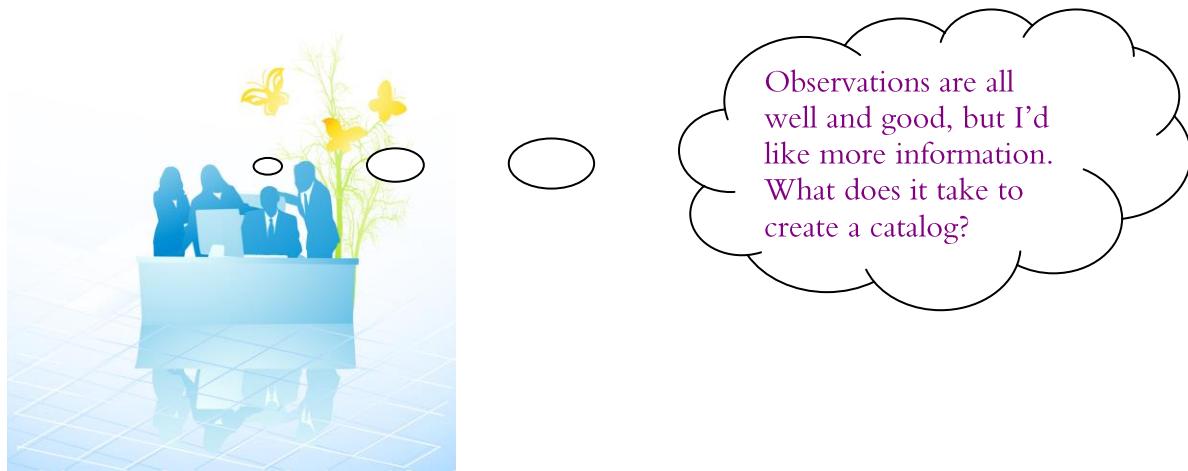

Why have a catalog?

The comment made by this person may be the best reason for having a library catalog: "We spend a lot of time looking for things on the shelf."   Still, library catalogs are good

for handling other library functions like checking out and checking in, keeping track of borrowers, generating overdue notices, or providing access to the catalog from offsite. Whether the library catalog is used for the single purpose of finding materials or for more sophisticated functions, catalogs are time savers. Additionally, catalogs can serve as public relations tools. Items that have been given in someone's name can be mentioned as such in the cataloging record as a way to honor donors. Use the space below to jot down some of your observations.

Ask: how often are staff and visitors unable to find materials; enough to be a problem? Should the resource center have a library catalog?

Observations are all well and good, but I'd like more information. What does it take to create a catalog?

What does it take to create a catalog?

The short answer is: staff or volunteers, data entry, and maintenance. The long answer requires taking a look at the cataloging record. Cataloging records are the foundation of the catalog. Keeping them current is key. Adding, deleting, and organizing them makes the catalog a useful tool. For this reason, staff or volunteer time should figure into the creation of these records, especially while you are setting up the catalog. More personnel time is required at the beginning and less time once all the records have been entered. To better determine what it would take to create and maintain a catalog for your organization, use this space to discuss this aspect. Ask: how big is our organization resource center collection? Do we have the staff or volunteer time for this type of work? If not, what would it take to get it? Can this be a goal for the future? Can we find funding?

Now that you have formed some initial thoughts about staffing, learn more about library catalogs themselves. Use the information below to imagine the kind you would like to have and decide whether your resource center could support it. The section, **Defining catalogs,** looks at the two major categories of library catalogs: manual and online. The sections, **Manual catalogs** and **Online catalogs** describe them. Read the definitions and review the types of catalogs. Look at the additional information on what it takes to maintain them. Then use the space here for discussion.

Defining catalogs (manual and online)

Generally speaking, manual catalogs contain cataloging records that are hand or type written and sorted manually to create a printed catalog that can be physically searched. Online catalogs have cataloging records that are entered and accessed electronically through software programs. Although the online catalog can be printed (and in some circumstances should be), it is often not. Rather, the catalog is virtual, resides in an electronic file, and is searched electronically.

Programs like MS Word, MS Excel, and MS Access can produce online catalogs. However, this toolkit defines online catalogs as those catalogs created with commercial software products that are designed especially for organizing library collections. Some of these products are very inexpensive and save the time you would spend setting up a Word, Excel, or Access catalog.

Manual catalogs

Examples
- Cataloging records are entered by hand into spiral binders
- Cataloging records are written or typed on index cards that are filed in boxes
- Cataloging records are typed and organized into a list using a word processing program. The list is printed and placed in three-ring binders
- Cataloging records on preprinted cards are specially ordered from library supply companies

What is required to build a manual catalog?

- Staff or volunteers create cataloging records for each item in the collection. Each record usually contains such information as the author, title, publisher, place of publication, year, and format (book, video, journal). Optionally, the record may include the ISBN, number of pages in a book, or length of a video.
- Subject headings are assigned.
- Call number is assigned.
- The records are then organized by author, title, subject, call number, or accession number (in the order they were purchased).[3]
- The catalog is made available to the staff and the public for searching.

Online catalogs

Examples
- Green-Field Library Catalog – search the catalog
- LibraryWorld – register and search the catalog

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[3] When it comes to organizing the catalog, it is easy to see the advantage in using cards over lists. You can move the cards around, organize them differently, and add and discard cards easily. In handwritten catalogs, you have to create an entirely new catalog every time you add or delete an item. In typewritten catalogs using a spreadsheet, you can use the sort function to organize, but you still need to print a new copy of the catalog in order to reflect the most up-to-date information.

- [ResourceMate](#) – get vendor information; download a demo
- [Library Thing](#) to build a cool catalog of your own books

What is required to build an online catalog?

- Staff or volunteers create records by entering the data described above into predefined cataloging records using library software. This usually takes the same amount of effort as manual systems.
- Subject headings are assigned.
- Call number is assigned.
- There is no need to organize the online catalog. The software will do that. Since the catalog is virtual and dynamic, a so-called mini-catalog is created each time someone does a search. The results form a list of items. One list will likely be very different from another because of the kind of search that is performed.
- Although the online catalog is dynamic, searches or lists can be printed and shared. These might include a list big enough to contain all the items in the collection or one small enough to include only those items on one particular subject, like the name of a disease or caregiving.

The pros and cons of manual and online catalogs

There are administrative, financial, and functional differences between manual and online catalogs. Online software will be more costly up front than the supplies would be for a manual system. Whether you create cataloging records for a manual or an online system, entering data takes time. The same amount time and effort is required at the beginning of either project. Upkeep on an online system, however, requires less time, effort, and expense once it is in place.

There are also differences regarding utility. A major distinction of an online system is the ability to search in multiple ways. In online catalogs, more data are available for searching. For example, let's say that the only information a visitor can recall about a video is the name of the publisher and one word in the title. By performing a keyword search on those elements, the title can be found instantaneously. No one has to search through cards or skim lists as you would with a manual catalog.

Resources

Manual catalog

Loveland, EJ. *The church library: an outline of procedure.*
Contains guidelines on organizing books, including producing catalog cards.
http://blogs.acu.edu/specialcollections/files/2013/10/The-Church-Library-An-Outline-of-Procedure.pdf. Accessed June 2018.

Online catalog:
Contact the Green–Field Library for these tools.

Alzheimer's Association Green–Field Library. *Exploring affordable online catalog.*
(PowerPoint presentation)
Outlines the benefits of online catalogs and lists software, hardware and other requirements necessary for installation. Includes points to consider when dealing with vendors and how to speak the language of library automation. Reviews and links to affordable online catalog products.

Alzheimer's Association Green–Field Library. *Establish reasons for automating questionnaire.*
Asks a series of questions to help you decide if library automation software is a desirable option for your organization. Answer yes to more than a couple of the questions and you may be ready for an automated library system.

Alzheimer's Association Green–Field Library. *Library automation software comparison.*
Compares the features of three library automation software packages. The empty box in front of each feature provides a place for you to record a checkmark indicating an element that is important to you. The questions are excellent to use when considering other products too.

Review what you've done. Should the resource center have a catalog?

Now that you have a better understanding of what is involved in building a catalog, use this space to review some of the issues you have already explored. Ask: are visitors and staff able to find what they need? If they are not, what kind of catalog would be best given our current staffing and resources? What plans can we make to create a library catalog for our organization resource center?

Our decision is to have / not to have a catalog.

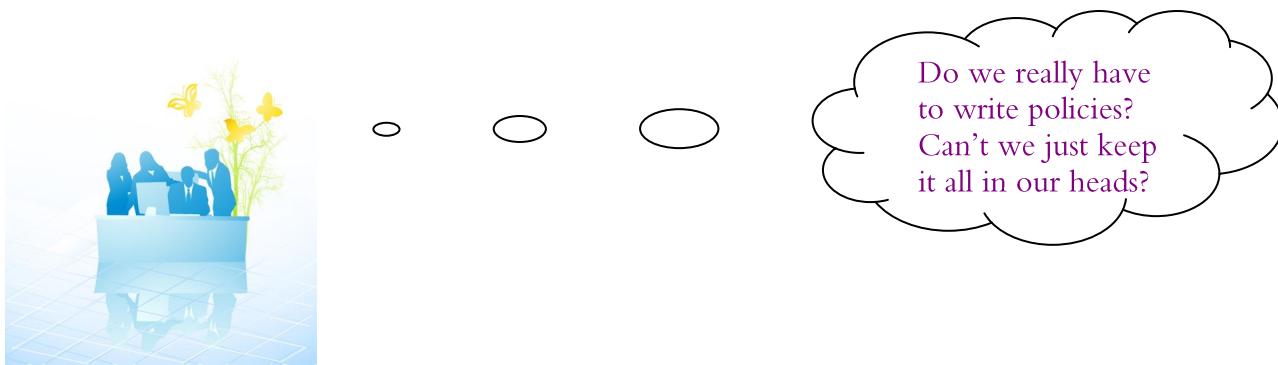We have chosen _____ to be the catalog for our resource center.

B. Circulation (manual and online)

Keeping track of the material that has been checked out, who has it, and when it is due back can be accomplished manually or with an online system. In a manual system, information can be logged in notebooks, on index cards, or typed in word processing documents. The information is checked periodically. If materials become overdue,

follow-up is required by calling the borrower or sending a reminder in the mail or through e-mail.

An online system can track circulation information using computer software. There are many different kinds of affordable circulation software programs. Some circulation programs are built into an online cataloging system. In other cases, the circulation program is purchased separately. The main benefit of an online circulation system is that it electronically tracks the names of those who borrow materials and knows when they are due back. It may also calculate overdue fines, print overdue notices, and perform other circulation functions. Additionally, the software may allow for documenting circulation policies and procedures.

The benefits of adopting even a few policies and procedures can be demonstrated whether you have a manual system or an online. Circulation policies and procedures help clarify resource center operations for staff, volunteers, and the public.

Do we really have to write policies? Can't we just keep it all in our heads?

Resource center policies and procedures need to be written. Lending Policies workform contains the key issues to consider when thinking about the circulation of materials. Options are listed throughout. You can circle your choices, fill in the blanks, cross out words that do not apply, or use the space provided to write your own. Work through the form to establish your circulation policies and procedures. Keep it close at hand to refer to. Let staff and volunteers know about it. Request the form from the Green-Field Library.

A word about overdues: overdue materials are a fact of life in every library, unfortunately. If there is no written policy or overdues are not tracked regularly, they can figure substantially in lost dollars. An online system can help. A manual system is efficient too. Establish a system for keeping on top of overdues. Additionally, know how to

handle repeat offences. If you send overdue notices try using an *Overdue Notice* template like this one. Contact the Green–Field Library to obtain a copy of this resources.

C. Reference services

An organization may not be set up to answer questions from the public full time. However, staff or callers may have questions about the organization, the specialty, or the like, and staff may need help answering those questions.

Reference is a service that resource centers offer any time someone asks a question. Reference questions can cover a broad range of topics from information and referral to care questions. The answers to reference questions come from many resources including print, online, and experts in the field. Sometimes questions require quick responses. At other times they can take hours, even days to get a final answer. In some organizations this is a function of a helpline or call center. In other organizations, questions may be handled by the library or staff who are subject specialists. Reference services can also include the practice of alerting staff and patrons to new materials and information.
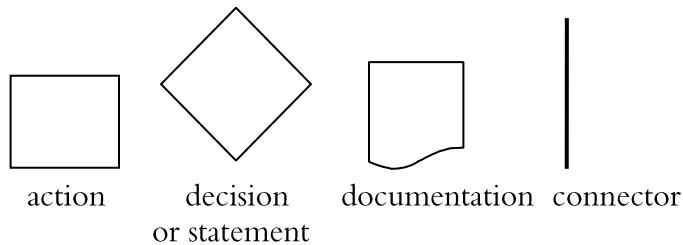
The life cycle of the reference question

It is a good idea to review what happens to a reference question once it is received. This will help staff and volunteers understand the correct path a question should take in order to be answered. Ask: are all questions referred to a helpline or call center? Are there

times when questions are referred to the resource center or to the person in the organization best suited to answer the question? Whatever the system you use, is it working? If it is not, how would you like to see questions triaged? How would you like to see Reference function differently in your organization?

Use this space for discussion.

Optionally, use the symbols below or any decision tree to follow the path that reference questions should take in your organization.

action   decision   documentation connector
              or statement

General reference guidelines

Establish some general reference guidelines that staff and volunteers should follow.

Name the staff positions that will be in charge of taking or answering reference questions in the organization (Helpline staff, administrative assistants, resource center volunteers, program staff, education staff, experienced caregivers, others).

How long should staff or volunteers work on reference questions before they are referred? When all reasonable resources have been tapped, to whom will questions be referred and in what order (other staff, contacts in the community, others)?

Staff can be alerted to new items of interest at staff meetings, through displays, or by routing the materials themselves. Give staff a list of the organization subscriptions, such as newsletters, magazines, and journals. Ask them to mark the titles they would like to have routed to them.

Use this space to name the subscriptions that might be routed:

To alert the public, include a news column in the organization's newsletter. Additionally, refer to *A Marketing Toolkit for Small Resource Centers* for other ideas on how to inform the public about the products and services of the resource center.

Other reference guidelines

Add here any guidelines not covered.

Reference tips

These tips and techniques can help a reference center run more smoothly. Review them. Use the space below to write your own.

- Keep a collection of non–circulating reference books on hand to help answer frequently asked questions.
- Track reference questions on an intake form. Contact the Green–Field Library for a sample question intake form.

- Keep a list of phone contacts of local professionals or staff who may be willing to help with tough questions.
- Track and recycle the answers to frequently asked questions that took a long time to complete.
- Train retired healthcare workers, librarians, or long-time caregivers to answer reference questions.
- Consult the allied associations for resources to help answer questions.
- Take advantage of educational offerings in your community on searching the Internet and evaluating Web sites.
- Use this space to add your own reference tips.

D. Virtual libraries, virtual reference, and knowledge management

Organizations are often pressured by overlapping projects and rapid deadlines. Quick access to information is essential for success. A virtual library, also known as an electronic library or digital library, can help staff be more productive. A virtual library is an electronic version of a traditional library where materials are is stored and retrieved. In a virtual library, books, articles, papers, reports, photographs, or archival materials are available digitally in full-text and retrievable through computer software or the Internet.

Your organization may already own pieces of a virtual library by way of its internal reports or minutes of board of director or executive meetings in PDF. You may subscribe to a service that provides access to electronic articles or commercial databases for use by staff.

You may have purchased certain titles of electronic textbooks. Staff may have bookmarked essential Web sites for use by others in the organization. There may be a growing, internal database, sometimes called a knowledge database or knowledge base, of guidelines, best practices, or other knowledge. These key elements, in addition to the practice of using these virtual resources and information to answer reference questions electronically, are the basis of the virtual library and virtual reference services.

According to the guidelines provided by the Reference and Users Services Association (RUSA), virtual reference is a reference service, such as chat, videoconferencing, co–browsing, instant messaging (IM), voice over Internet protocol (VoIP) or email, conducted electronically through computers or the Internet.[4] Most VRS are in real time and use synchronous communication.[4] Although reference services can be conducted using telephone, fax or mail, those are not *virtual* reference.[4]

Use this space to discuss digital resources, electronic services, or communication modalities in your organization that might be the foundation of a virtual library:

Recently there has been a trend toward combining the virtual library and virtual reference service together under one user interface or portal or one electronic function to which staff have access over the Internet. Resources with no physical location eliminate the task of having to find them on the shelves. These virtual and dynamic resources can be updated automatically and with greater frequency by the organization itself or the company responsible for the content. Technology companies sell software to help implement virtual libraries. Some IT or Web departments develop internal systems for

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[4] Cheng, Y.L. Virtual reference services. *Bulletin of the American Society for Information Science and Technology.* Dec–Jan 2008; vol. 34(2), p. 6.

their organizations. With little expertise, resource center staff can construct a virtual library and virtual reference service with products that are free on the Web.

Another concept of the virtual library is knowledge management, also known as KM. Some people think of knowledge management as the overall system of gathering, organizing, and sharing information and resources. This could include the collection of books, journals, and other materials; an online catalog, searchable databases, or any print or electronic resource used to answer questions. Recently, business and industry have given rise to a more universal understanding of knowledge management. While knowledge management is still the practice of gathering, organizing, and sharing information and resources, it is additionally about collecting, analyzing, interpreting, and transferring internal organizational knowledge. Knowledge management is characterized by the impressions, opinions, ideas, and skills of the workers. Many organizations implement knowledge management so that staff do not have to reinvent the wheel each time they begin a new task or project. They can refer to previous undertakings and therefore to the collective knowledge and past experiences of others in the organization in order to gain knowledge that might help them. A small resource center can be in charge of this type of knowledge management for the organization. Additionally, the resource center should collaborate and network with any department whose responsibility is knowledge management.

Because of the nature of KM, the organizational structures and function of knowledge bases vary. Searching, cataloging, indexing, linking, and filtering to find the best information play a role in almost every knowledge base.[5] Moreover, one feature of a knowledge base may allow users to search and browse, another to submit new information, another to create a personal account of specific information, and another for internal management to maintain the components. They may be organized and searched by taxonomies, codes, function, levels, projects, innovations, formats, actions, geography, or users to name a few. The ideal situation is to be familiar, even expert, at searching the knowledge base for organizational information to help staff address their specific needs. This includes being familiar with software functionality, helping to create the taxonomy or subject headings of the knowledge database, and a reasonable to in-depth understanding of the business itself.

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[5] Angus, J.; Patel, J.; Harty, J. Knowledge management: great concept…but what is it? *Information Week.* Mar 16, 1998 online. http://www.informationweek.com/673/73olkno.htm. Accessed February 2010.

Virtual libraries, virtual reference, and knowledge management are complex processes and much has been written about their design, capacity, and functionality. These resources provide more information and tools for further exploration for a small resource center.

Resources

Hurley, TA, Green, CW. Knowledge management and the nonprofit industry: a within and between approach. *Journal of Knowledge Management Practice.* Jan 2005. http://www.tlainc.com/articl79.htm. Accessed June 2018

Shucha, B. *IM a librarian: establishing a virtual library with little cost or technical skill.* Aug 27, 2007. https://www.llrx.com/2007/08/im-a-librarian-establishing-a-virtual-reference-service-with-little-cost-or-technical-skill. Accessed June 2018.

Siess, JA. *The new OPL sourcebook: a guide for solo and small libraries.* Medford, NJ: Information Today, 2006. Contains chapter sections on the virtual library and knowledge management for the one person library. View the table of contents at http://books.google.com. Accessed June 2018.

Special section. Virtual reference services. *Bulletin of the American Society for Information Science and Technology.* Dec–Jan 2008; vol. 34(2), pp. 6–28. http://www.asis.org/Bulletin/index.html. Accessed June 2018.

E. The brave new world of social networking

Built on trust, social networking depends on sharing personal experiences and knowledge with people who have similar interests. It is as much an attitude as it is a technology. Many libraries and resource centers see social networking as a way for people to connect with others in the organization who have similar jobs and like interests. It gives staff a chance to learn from one another and enhance productivity. Many libraries are incorporating social

networking into their workflow. Even small resource centers can benefit from using Web 2.0 technology. [6]

Case study 1:
Jane, a library manager has been trying to find ways to get the word out about what's new in their resource center. Today, her blog describes the contents of a new trade report. In her commentary, she reflects on the key findings and how they support data reported by her organization last year. The blog also outlines the table of contents for the weekly editions of two widely-read publications.   Additionally, she tells a brief story about Grace from marketing who used the library yesterday, the nature of her assignment, her deadline, how she found what she needed, and lessons learned by all.   Later, Janet and Bob from the health relations department put out a message on the blog that they want to talk with Grace about her project, and they contact her.

Case study 2:
José publishes bibliographies on timely topics of interest for people in the organization. He plans to update one of the bibliographies on advocacy. He sets up a wiki and invites people to participate by sharing the best articles and books they've read on advocacy and public policy in health. Not only does José get ideas for the bibliography, but he gets a taste of what is important to the staff and anyone who goes to the wiki does too. Staff are drawn into the collaborative process and virtually into the library. The technology becomes a platform for organizational productivity.

There are many features of social networking. Services like Facebook and Twitter can be vehicles for connecting with the staff in your organization by creating pages of news and blogs about the library. Consider putting the water cooler or coffee setup in your space like many popular bookstores. The resources at the end of this module may help you get started.

Use the space below to jot down a few reasons why social networking worked for Jane and Jose. What do you think might have been the challenges?   Would social networking be a viable way of communicating within your organization?

Notes:

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[6] O'Reilly, T. *What is Web 2.0?* http://www.oreillynet.com/pub/a/oreilly/tim/news/2005/09/30/what-is-web-20.html. Accessed June 2018.

Resources

25 useful social networking tools for librarians.
http://www.collegedegree.com/library/financial-aid/25-useful-social-networking-tools-for-librarians

Facebook for libraries.
http://www.diglib.org/forums/spring2009/presentations/Boyer.pdf

Twitter for libraries.
http://www.infotoday.com/cilmag/may09/milstein.shtml

F. Collection maintenance

Collection maintenance involves keeping a close eye on some of the activities already covered in the toolkit and paying attention to more specific areas of library maintenance. These include centralizing the collection, adding new items and cataloging, shelving and refiling, indexing, and weeding old materials. Review them here and refer to the hyperlinks and the footnotes for more information.

- Centralizing the collection. This area involves assembling all the materials in the organization and having them available in one central location for staff and the public. Sometimes this is hard to do, especially if staff prefer to keep materials in their offices. The advantages to one central collection, however, outweigh the benefits of smaller collections dispersed throughout the offices. To review related information on centralizing the collection, see "Organizing the collection."
- Shelving & refiling. Materials that are shelved and refilled in a timely fashion add to a smooth running of a resource center. Create a shelving and refilling schedule;
- once a week may be sufficient. To review related information on shelving and
- refiling see "Organizing the collection" and Resource Center Circulation Policy Template.
- Indexing organizational articles and reports
- Weeding the collection.[7]

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[7] There are several ways to weed. Weeding by date involves choosing a cut off point and discarding everything before that year. Weeding by selection (i.e. frequency of use or importance to the organization) may involve keeping publications that are by renowned experts. It might include keeping authoritative treatments or material not easily found elsewhere. It could also include keeping those materials that have proven the test of time for the subject area.

Module 5 - Marketing

A separate toolkit for marketing will assist organizations in marketing their library/resource centers. *A Marketing Toolkit for Small Resource Centers* contains a series of exercises to help you explore marketing ideas and create a marketing plan. The resources in its appendixes are easy-to-use tools for gathering information or are promotional materials that can be adapted. Contact the Green-Field Library to obtain a copy of this resource.

Module 6 - Evaluating the Resource Center

A separate tool to help organizations assess their resource centers or branch and regional offices is available. *Resource Center Self-Assessment Checklist* lists a series of questions. Answer the questions to identify strengths, pinpoint gaps, clarify goals, and make long-range plans. Contact the Green-Field Library to obtain a copy of this resource.

Module 7 - Finding the Dollars

Finding the Dollars

A resource center that is well organized and runs smoothly is a source of pride and can even drive dollars toward the organization. When funding for the

resource center is limited, however, finding grant money may be a good option. Below are tips for finding resource center funding and grant resources.

Tips

- Seek donors for resource center materials (books, videos, kits) and equipment
  - Honor a family member by putting their name on a bookplate or including it in the cataloging record. Bookplates can be purchased at any of the library supply houses listed at the end of the toolkit.
  - Name the resource center after a family member, or foundation or company.
  - Provide naming rights to an annual resource center event (a tour or educational event) after a family member.
- Ask for "library resources" in <u>every</u> grant proposal the organization writes, even if the grant does not directly involve the resource center.

Grant resources

Non-profit guides. Non–Profit Guides offers free web-based grant-writing resources for non–profit organizations. The guides are designed to assist established non–profits through the grant–writing process. www.npguides.org. Accessed June 2018.

100 free money sources for libraries
Grant resources for writing and seeking funds for nonprofit resource centers. See especially *The Foundation Center's FND, Money From The Cell Phone People, Wells Fargo Foundation, Money From Walgreen's, $150 Million From Walmart, $10,000 For Volunteers, and The Verizon Foundation.* http://www.lesko.com/libraries. Accessed June 2018.

Questions and discussion

 Use this space to keep track of any unanswered questions.

Resources

Horrell, J. Setting up a library and information service from scratch. *Education for Information.* Jun – Sep 2006; vol. 24(2-3), pp. 166-167.

Loveland, EJ. *The church library: an outline of procedure.* http://blogs.acu.edu/specialcollections/files/2013/10/The–Church–Library–An–Outline–of–Procedure.pdf. Accessed June 2018.

Oberwarth, M. Checklist – setting up a library and information service. *Legal Information Management.* Win 2007; vol. 7(4), pp. 295-297.

Outagamie Waupaca Library Systems. *Sample library policies for the small public library.* http://www.owlsweb.info/l4l/policies/sample.asp. Accessed February 2010.