

PARTNERSHIP

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Content Analysis of Canadian Academic Library Gift and Donation Webpages

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Abstract

Gifts and donations form an integral part of an academic library's existence, whether monetary or physical items. While monetary gifts are greatly valued, gift-in-kind donations of physical items can also contribute rare or unique items to collections. However, gift-in-kind donations also bring many challenges, as processing and evaluating physical materials can be time-consuming and labour-intensive; moreover, these materials may occupy significant amounts of space and ultimately may or may not add value to the library collection. Providing clear, publicly available gift and donation information can mitigate some of these challenges and help to set expectations for donors by giving a clear overview of the evaluation process and letting them know which types of material are of interest. The author reviewed donation-related webpages of twenty-one Canadian academic libraries to determine commonalities regarding library donation webpages. This analysis can provide practical assistance to librarians who are creating or revising gift-in-kind policies and procedures in Canadian academic libraries.

Keywords

donations; gifts; academic libraries; library webpages; content analysis

Introduction

The University of Northern British Columbia (UNBC) is a small, research-intensive university located in Prince George, British Columbia. Originally, UNBC served as a

primarily undergraduate institution, but has since grown to offer a number of Master's degrees and two Ph.D. programs.

When UNBC's Geoffrey R. Weller Library first opened in 1991, any and all gift-in-kind (physical) donations were welcomed in an effort to build an opening day collection and give the Library a broad base to support its academic programs. Focus areas were only mentioned in general university documents, not in a collection development policy or in gifts and donations policies. Because of this historical background, the Library has had a predilection for broad-based collection building and thus a tendency to accept almost any donation offered, rather than only those that enhance or fill gaps in the collection.

UNBC's status as a relatively young university also had an impact on the types of donations made. Potential donors often believe that the Library is still building the core of its collection and would be grateful for any donation. Rather, while the Library does not have a large retrospective collection, the existing collection is quite strong in the university's major focus areas (forestry, environmental studies, and First Nations studies).

As both the publicly available donation information and the culture in the Library were focused on building the core of the physical collection, we experienced many challenges surrounding the gifts and donations process. In light of this situation, I conducted a content analysis of publicly available donation webpages of Canadian academic libraries to determine current practices and establish a blueprint for the revision of the Library's own webpage.

Literature Review

A review of the literature reveals many articles dealing with evaluating, accepting and processing gifts and donations, but very little analysis of what information libraries actually communicate to the public regarding their gift and donation policies and procedures. In general, the literature agrees that gifts and donations provide a valuable service to libraries as a way to add to or enhance a library's collection (Korolev, 2002; de Parades, 2006; Sibley, 2009; Edem, 2010; Williams, 2014), as an opportunity to increase a library's budget with monetary gifts (Korolev, 2002; Martin, 2000; Casey & Lorenzen, 2010) and as a way of improving public relations which may lead to more substantial donations in the future (Korolev, 2002; Wedgeworth, 2000).

However, the literature also agrees that there are significant challenges with gifts-in-kind. Gift-in-kind donations can be time-consuming, labour-intensive and take up significant amounts of space. Tensions may also arise with donors who have an emotional attachment to their gifts and feel that they are valuable regardless of any assessment. These donors could be offended if a librarian does not feel the same way, which could negatively impact public relations (Bybee, 1999, Korolev, 2002; DeWitt, 1988).

Bybee (1999) and Casey and Lorenzen (2010) point to the importance of providing easily accessible information on library webpages. Clear information does not only give

guidance to potential donors as to what types of material are acceptable (or unacceptable) but also provides a clear overview of the evaluation process so donors know what to expect. This information can also give staff certainty and confidence in dealing with potential donors.

Methodology

The first stage of the content analysis was to find appropriate libraries' gift and donation webpages. As UNBC strives to be a research-intensive university, the twenty-nine members of the Canadian Association of Research Libraries (CARL) were identified as the target group. I limited my review to webpages in English, as my knowledge of French was not sufficient for content analysis. I also limited my review to webpages that were publicly available. A total of twenty-one libraries' gift and donation webpages were found and reviewed (see Appendix A).

I was interested in analyzing the common elements of the libraries' donation webpages. As this analysis was inspired by practical needs, the questions I was interested in were:

- Is there a main contact that potential donors can easily find?
- Are monetary donations mentioned?
- Is there a screening process for potential donations?
- Are examples of preferred or unacceptable material given?
- Is there reference to the total cost of the gift-in-kind donation?
- Who covers the cost of shipping?
- Who covers the cost of appraisal?
- Is the tax receipt process mentioned?
- Is the disposition/ownership of donated items mentioned?
- Are unsolicited gift-in-kind donations mentioned?
- Is there a separate process for Archival/Special Collections donations (where appropriate)?
- Are there details of how donations are acknowledged?

Content Analysis

Contact Information

All the library webpages reviewed directed potential donors to an initial contact person to discuss a donation—whether monetary or gift-in-kind donations. Some webpages directed potential donors to different places depending on the context of the inquiry (see Figure 1). Most webpages (18) gave a main contact for gift-in-kind inquiries, usually a librarian who was involved in some way in collection development. One library's webpage directed all potential donors to the Development Office for both gift-in-kind and monetary donations. Another library's webpage directed donors to a specific person but did not specify that person's role.

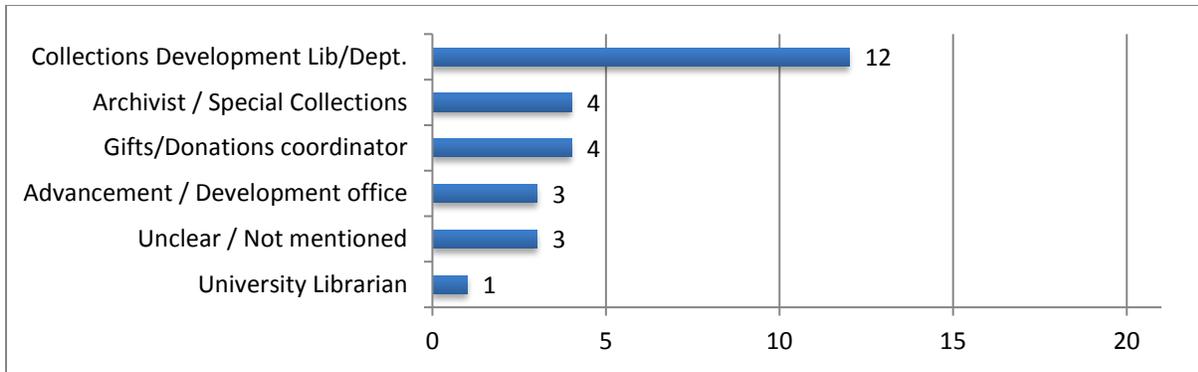


Figure 1. Contact information mentioned on reviewed webpages. Some webpages directed potential donors to different places depending on the context.

Monetary Donations

Although the library donation webpages reviewed were primarily focused on gifts-in-kind, the majority (15) mentioned monetary donations as well. Two libraries' webpages gave specific examples of what could be purchased with varying amounts of money, either through one-time monetary gifts or ongoing financial support. Where monetary donations were mentioned, the contact was usually the broader institution's Advancement or Development Office (see Figure 2).

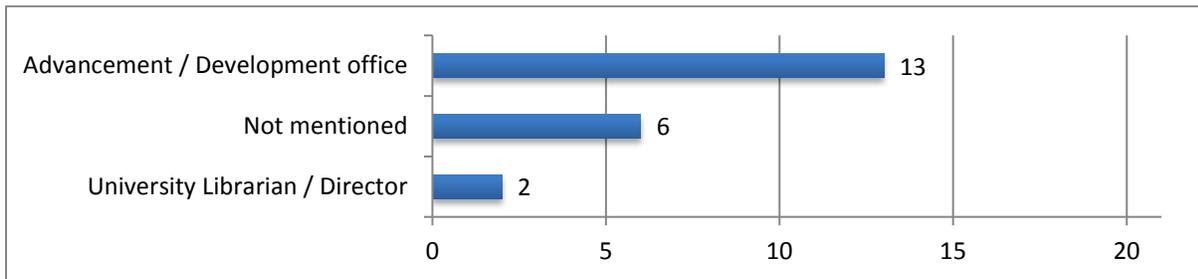


Figure 2. Contact for monetary donations mentioned on reviewed webpages.

Screening Process

Most of the library webpages specified a screening process to review the proposed donation, with the majority (17) requesting a list of items from potential donors (see Figure 3). In some cases, the webpages stated that a tax receipt would only be given if a list of items was provided. Some libraries also offered site visits by librarians to review potential donations for special cases. Only four libraries' webpages did not mention a screening process.

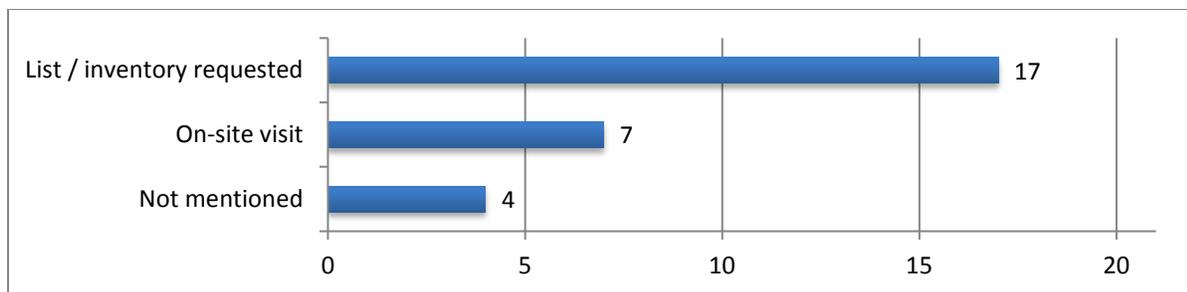


Figure 3. Screening processes mentioned on reviewed webpages. Some webpages mentioned more than one type of screening process.

Examples of Preferred or Unacceptable Material

Most of the library webpages reviewed referred to the library’s collection development policy and stated that gift-in-kind donations must meet these same criteria. Similarly, most of the webpages stated that donated material must support the teaching, learning, and research of the institution with some mentioning unique, rare, or significant material as preferred. Two webpages were notable exceptions, indicating that they would only accept rare or special collections material. Three webpages explicitly listed preferred subject areas but most of the webpages reviewed did not (see Figure 4).

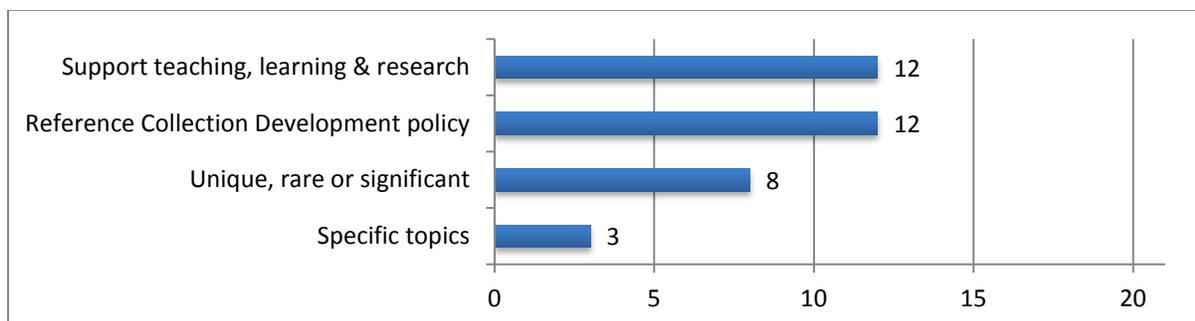


Figure 4. Examples of preferred material for donation mentioned on reviewed webpages. Some webpages mentioned more than one type of preferred material.

Most of the libraries stated types of materials that were unacceptable (see Figure 5). The types of material that were generally considered unacceptable included: material in poor condition, textbooks or course material, duplicates of material already owned, mass market paperbacks, and partial runs of journals. Other categories of unacceptable material were only explicitly listed on a few library webpages (i.e., photocopies, obsolete technology, inappropriate academic level or subject, etc.).

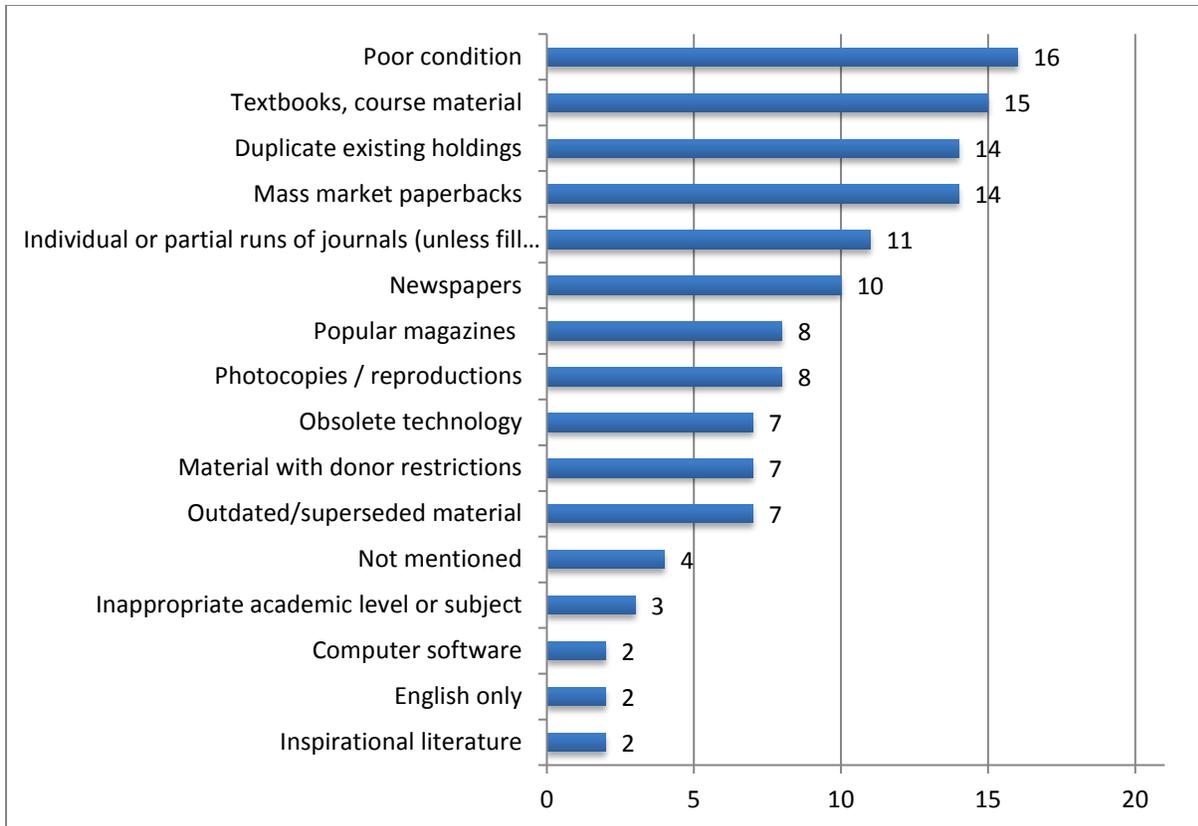


Figure 5. Examples of unacceptable material for donation mentioned on reviewed webpages. All webpages mentioned more than one example of unacceptable material.

Total Cost of Gift-In-Kind Donation

Twelve of the webpages mentioned the total cost of donations (cataloguing, processing, space, etc.) as a consideration when evaluating potential donations (see Figure 6). Usually the total cost referred to the cost of processing and maintenance, but seven webpages mentioned the cost of housing or storing donated materials as well.

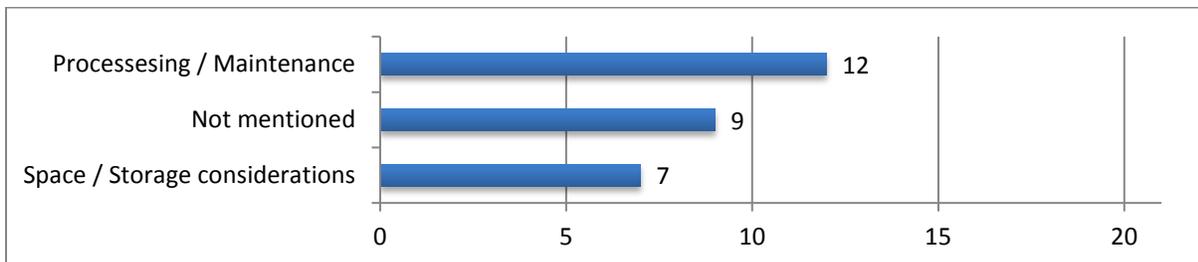


Figure 6. Additional costs related to donations mentioned on reviewed webpages. Some webpages mentioned more than one type of cost.

Cost of Shipping

Many of the webpages reviewed (10) did not mention who would cover the cost of shipping donations to the library. Of those who did mention it, five stated that the donor would pay the cost of shipping material to the library, regardless of where the donation came from. Three stated that the library would cover the cost for local shipping only and three stated that the library would cover all shipping costs (see Figure 7).

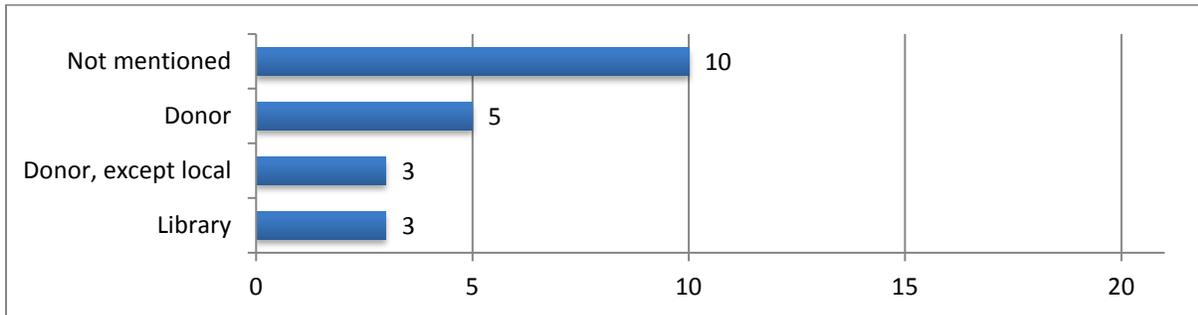


Figure 7. Shipping costs mentioned on reviewed webpages.

Cost of Appraisal

There was a relatively even split in the reviewed webpages over whether the library or the donor would cover the cost of appraisal (see Figure 8). Seven of the webpages reviewed requested that the donor cover the cost of appraisals. Six of webpages stated that the library would cover the cost of appraisals in all cases, while two stated that appraisals would be covered by the library except in special cases where a second appraisal was requested or the appraisal was likely to be valued at over \$1000. Three of the library webpages stated that there would be a negotiation as to who would cover the cost.

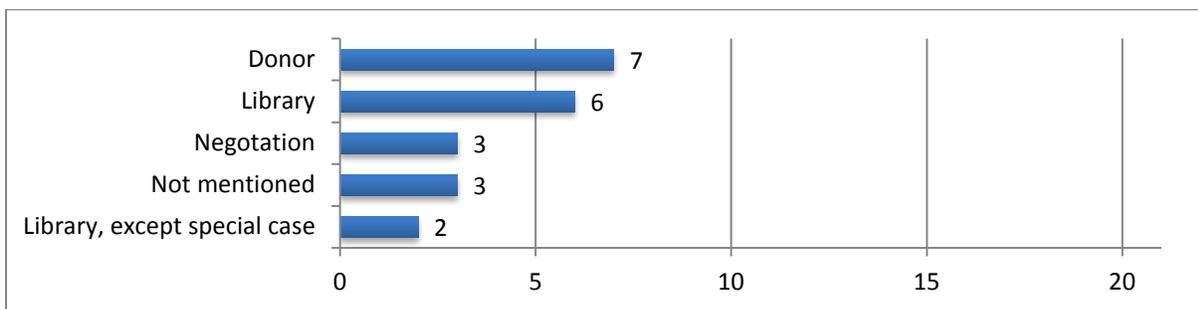


Figure 8. Appraisal costs mentioned on reviewed webpages.

Tax Receipt Process

The majority (14) of library webpages reviewed mentioned the tax receipt process for donations and many explicitly referenced Canada Revenue Agency guidelines (see

Figure 9). Six of the webpages reviewed stated a minimum donation value was required for a tax receipt to be issued. This minimum varied from \$100 to \$750. Some webpages included wording about the timing of the tax receipt and material not eligible for tax receipts such as: material acquired with government funds, university grants, professional development allowances, and review copies of books.

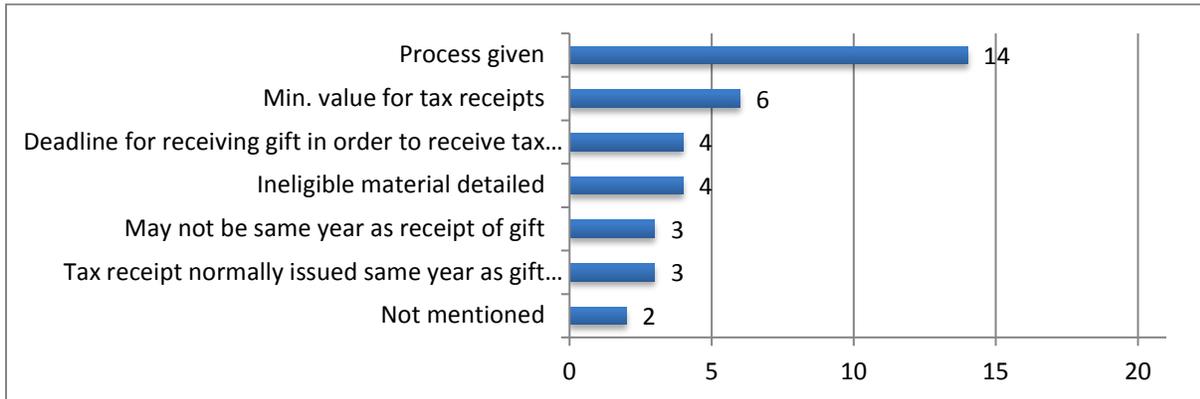


Figure 9. Tax receipt process details mentioned on reviewed webpages. Most webpages gave more than one type of detail about the tax receipt process.

Disposition/Ownership of Items

Most (17) of the library webpages reviewed indicated that donated materials would become the property of the library and that they could be disposed of as necessary (see Figure 10).

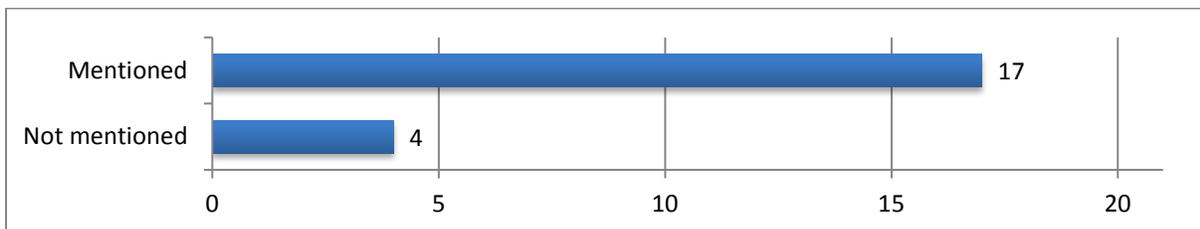


Figure 10. Disposition or transfer of ownership mentioned on reviewed webpages.

Unsolicited Gift-In-Kind Donations

Most (15) of the library webpages reviewed did not mention unsolicited donations (see Figure 11). The few that did mention them either stated they did not accept unsolicited donations or made it clear that they had no obligation to the donor and had the right to dispose of these items.

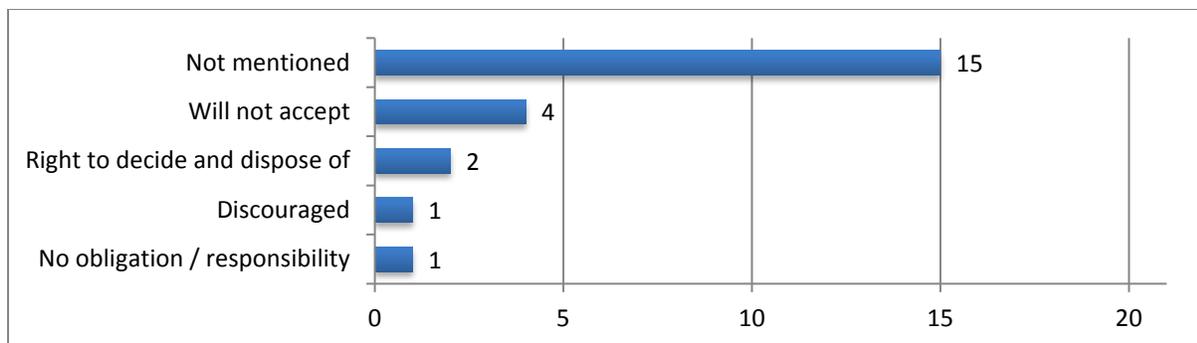


Figure 11. Unsolicited donations mentioned on reviewed webpages. Some webpages mentioned more than one detail about unsolicited donations.

Archival/Special Collections Donations

Over half (13) of the library webpages reviewed mentioned different contacts or processes for archival or special collections donations (see Figure 12). There are very different selection criteria and processes for archival or special collections donations, especially if a Cultural Property designation is sought for the material. Four of the webpages reviewed directed people to separate webpages specifically for Archives or Special Collections. Two libraries gave specific examples of topics that the Archives or Special Collections were looking for and two libraries encouraged their faculty members to deposit their material in the Archives/Special Collections.

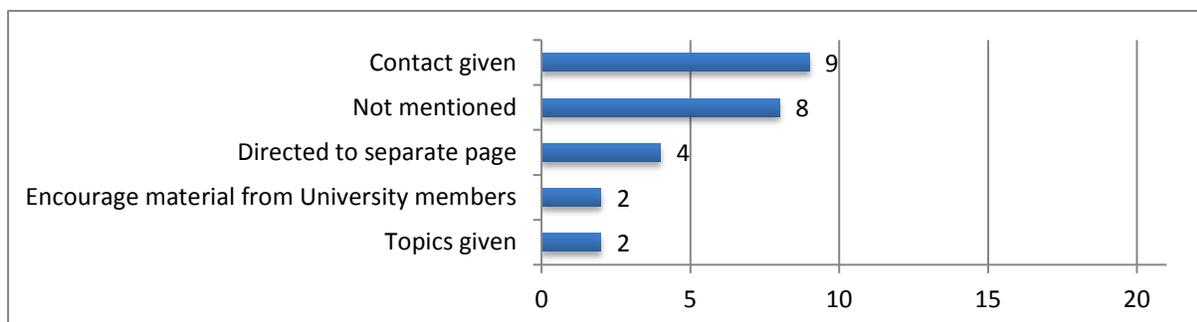


Figure 12. Archival or Special Collections donations mentioned on reviewed webpages. Some webpages mentioned more than one detail about Archival or Special Collections donations.

Donation Acknowledgement

Most (14) of the library webpages reviewed explained how donations would be acknowledged (see Figure 13). Some webpages stated that they would send a letter from the University Librarian (or designate), some would add a note in the catalogue record, and some would add bookplates on request. Other types of acknowledgement were referred to, including tax receipts. Seven of the library webpages reviewed did not explicitly mention any form of donor acknowledgement.

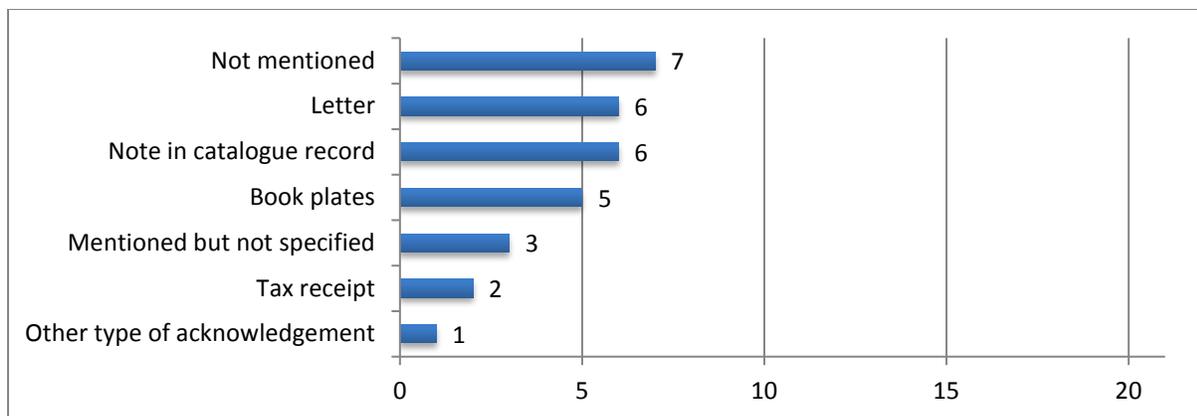


Figure 13. Donation acknowledgement mentioned on reviewed webpages. Some webpages mentioned more than one type of donation acknowledgement.

Discussion

There was considerable overlap between the donation webpages reviewed. Common practices included the following:

- indicating contact information
- articulating the library's screening process
- providing examples of unacceptable material
- including a statement of transfer of ownership to the library
- mentioning some form of donor acknowledgement

However, there was also great variation in other areas, such as:

- indicating preferred types of material
- specifying whether donors or libraries were responsible for shipping or appraisal costs
- providing details about the tax receipt or evaluation process
- indicating how libraries would respond to unsolicited donations

All the webpages reviewed provided a contact for potential donors wishing to speak to someone about a gift or donation. These contacts usually had a role in collections or acquisitions. Most of the library webpages also mentioned a process for potential donors to make monetary donations, although these types of donations were usually handled through the university Advancement or Development Office. Monetary donations can be significantly more valuable to libraries than gifts-in-kind. Mentioning monetary donations, as well as giving practical examples of what could be purchased with varying amounts, is a very strategic use of the library's webpages. Donation webpages can also remind potential donors of the hidden costs of running the library and inspire them to participate in supporting the goals of the library.

All the webpages reviewed mentioned a screening process, with the preferred method being a list provided by the donor. Interestingly, two academic libraries explicitly focused on unique or rare material to enhance their collection rather than using gifts-in-kind for

general collection building. Donations of physical materials are time-consuming, labour-intensive, can take up significant amounts of space and may or may not add value to the library collection. At this point, only two libraries appeared to take that direction in their webpages, but it would be interesting to further explore this theme.

The libraries identified many of the same types of material as unacceptable, including:

- material in poor condition
- duplicates of material already owned
- textbooks
- trade paperbacks
- partial runs of periodicals

It is likely that these criteria could be expanded upon with more discussion amongst libraries. There was also general agreement that donations have broader costs than just their appraised value as processing, maintenance and storage costs are mentioned in most of the library webpages. Most of the libraries' webpages also had a statement regarding the transfer of ownership to the library, possibly to prevent misunderstandings if the donated material was weeded. Finally, most of the library webpages gave an indication of how donors would be acknowledged, although the specific methods of acknowledgement varied greatly. Making these kinds of details publicly available can help to make the donation process as transparent as possible and clarify what donors can expect.

There did not appear to be consensus regarding who was responsible for shipping and appraisal costs for gifts-in-kind. Libraries' webpages were either silent on these issues or divided as to whether the library or the donor should bear these costs. There are various factors to consider when determining the cost of shipping and appraisals: the size and location of the collection, the costs of shipping and appraisal, as well as the fear of alienating the donor who may or may not be amenable to support the library or the institution in other ways. Given the interplay of these factors, it is not surprising that there is no clear consensus on the cost impacts of shipping and appraising. There is also difficulty with the actual workflow of the appraisal process. A lot of work must be done before accepting a donation in order to determine whether the items would be appropriate for the library collection and to estimate whether an internal or external appraisal will be necessary.

The majority of library webpages mentioned the tax receipt process, but there was no consistency in the details given. Some libraries gave a deadline for submission for tax receipts to be issued in a particular year and some libraries only issued tax receipts for donations over a particular minimum value.

Surprisingly, the majority of the library webpages did not mention unsolicited donations. However, the libraries may keep details of that process in an internal document rather than on a publicly available webpage.

Limitations and Areas of Future Study

The exclusion of francophone institutions and non-CARL Canadian academic libraries is a major limitation of this study. As such, these results are suggestive, but cannot be generalized. Extending the scope of the study into non-CARL academic libraries and including francophone institutions may allow us to draw more refined conclusions. Another potential area of research would be to review actual policies or practices to determine if the guidelines in the donation webpages are followed in practice and whether clear guidelines reduces the volume of unwanted or inappropriate donations. It would also be interesting to explore the theme of libraries that explicitly focus on unique or rare materials to the exclusion of other types of gifts-in-kind. Finally, the experiences of academic libraries in other countries may be relevant.

Changes at UNBC

Following this review, many changes were made to UNBC's Gifts and Donations Policy. Most significantly, the Library's former focus on general collection building was removed and the policy enhanced to emphasize a more considered evaluation process for proposed gifts or donations. Monetary donations are now highlighted and examples are given to indicate what different amounts could purchase. Examples of preferred and unacceptable material have been expanded to refer to the Collection Development Policy and to highlight the desirability of unique and significant gift-in-kind donations. Donors are also asked to provide lists of proposed donations to assist with assessment and information about tax receipts and appraisals was updated. Donors are not asked to pay for shipping of accepted material, but they are asked to pay for an external appraisal if necessary. Details about donor recognition (bookplates and letters) have been updated as well. The policy also specifies that the Library is under no obligation to accept unsolicited donations, which will hopefully avert future misunderstandings. Finally, specific contact details are given based on whether a donor is interested in donating money or gifts-in-kind. Donors who are interested in donating to the Archives or Special Collections are directed to a separate webpage.

It is too soon to tell whether having the updated Gifts and Donations Policy will have an impact on the type and number of donation inquiries that the Library receives. However, being able to direct potential donors to a clear and reasonable policy has made sensitive conversations slightly easier.

Conclusion

Although gifts and donations are an integral part of an academic library, in terms of both collection building and public relations, there are challenges with gifts-in-kind. Decisions about specific practices and procedures around gifts-in-kind need to be determined by each library according to various local factors, but this analysis suggests that the libraries reviewed deal with similar challenges and have relatively similar ways of addressing them. These include having clear contact information, details about the

screening process, examples of unacceptable material, a statement of transfer of ownership to the library, and some form of donor acknowledgement.

Ideally, this review will be useful to libraries that are creating or revising their gifts and donations policies. It is hoped that general consistency in the messaging around gifts and donations among all libraries will result in donors will having a clearer understanding of the process that libraries use to assess gifts.

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Appendix A: Library Donation Webpages

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