

Gifts: Things to Remember

Ferengi Rule of Acquisitions #218: *"Sometimes what you get free costs entirely too much."*

1. **Contacts with donor, phone, email, visit – the key is good communication**

- Always make sure Dominique Coulombe and Nancy Jakubowski know of an offer of a gift.
- For Manuscripts, please let Manuscripts staff know of an offer of a gift so they can plan and arrange for temporary storage space of the collection.
- We need to know who the donors are (include University affiliation if applicable), and where the donors live along with address, phone and or e-mail if available. Even if you turn down the gift, we'd like to know about it.
- When an offer is referred to you, please respond as quickly as you can with copy to Dominique and Nancy, and Manuscripts staff if applicable.
- Be friendly but be ready to explain our guidelines and constraints to donor.
- For Manuscripts, let the donor know that they will have to sign a deed of gift transferring ownership of these materials to Brown University. There are two types of deeds of gifts: one that transfers literary rights to Brown University and one that allows the donor to retain the literary rights.
- Always mention that the Library reserves the right to dispose of the items unless the donors has placed restrictions on the gift and we are accepting the gift with those restrictions
- For "Purchases of new Library materials with monetary donations", see point 4 below

2. **Selection – ask questions – visit may be necessary**

- Inquire about the subject area and language of the items
- Inquire about the formats and quantity
- Inquire about the physical condition of the gift and how it has been stored. Be suspect of materials that have been stored in basements or sheds.
- Follow the collecting guidelines written in the CDPs to decide to accept the gift or not
- In general do not accept added copies (an example of an exception: poetry or plays we would want both at the Hay and at the Rock) or single issues of serials
- We definitely do not accept gifts if we know that the books will end up in the booksale

- Do not accept materials that require a lot of packing and pick-up unless the materials are very important to the collection
- Accept large collections only when the collection as a whole has value and you have consulted with Sam Streit, Dominique, and Steven E. Thompson.

3a. Gift is rejected

- a. If the gift offered is not appropriate for Brown, suggest another library or institution that would be more appropriate.
- b. Provide a list of alternative places that may accept donations of library materials
- c. Email Dominique and Nancy with decision, and Manuscripts staff if applicable.

3b. Gift is accepted – no packing/pickup needed

- a. Notify Nancy, Crim, Linda and Dominique, and Manuscripts staff if applicable.
- b. Make arrangements to have the donor bring materials to the Library
- c. Meet the donor yourself or arrange to have Crim or Nancy meet the donor during work hours; check with Crim or Nancy for their availability before firming up the appointment.
- d. For manuscripts, keep the Manuscripts staff informed of when the collection is going to arrive so they can move the boxes to the stacks and accession the collection.

3c. Gift is accepted and is on campus; packing/pickup needed for up to 20 boxes. If the gift exceeds 20 boxes, discuss the situation first with Dominique, Sam Streit and SET, and Manuscripts staff if applicable.

- a. Before arranging for pick-up, subject specialist must
 - I. View the materials
 - II. Sort the materials into what we are accepting and what we are not accepting
 - III. Give packing directions to donor; note that the mailroom staff does **not** pack gifts. Tell the donor that the boxes must be small (photocopy paper or liquor size) (banker's boxes or transfile boxes are acceptable for manuscript collections) and give Crim the address, directions if needed and phone number of donor
 - IV. Crim or Manuscripts staff will go to the donor's office to make sure that the boxes we are accepting are packed properly
- b. Crim or Manuscripts staff will make arrangements with Jim Hannon to schedule the pick-up
- c. If donor is in a rush to empty a room for example, we can provide boxes for them to pack, store and hold on to the gift for a little longer.
- d. Notify Nancy, Crim, Linda and Dominique, and Manuscripts staff if applicable; include address, directions if needed and phone number of donor; For large or valuable collections, see considerations before

3d. Gift is accepted and is local (RI, nearby MA & nearby CT) packing/pickup needed for up to 20 boxes. If the gift exceeds 20 boxes, discuss the situation first with Dominique, Sam Streit and SET, and Manuscripts staff if applicable.

- a. Before arranging for pick-up, subject specialist must
 - View the materials
 - Sort the materials into what we are accepting and what we are not accepting
 - Give packing directions to donor: boxes must be small (photocopy paper or liquor size) (banker's boxes or transfile boxes are acceptable for manuscript collections)
 - Check that the boxes are properly packed
- b. If donor is in a rush to empty a room for example, we can provide boxes for them to pack, store and hold on to the gift for a little longer.
- c. Notify Nancy, Crim, Linda and Dominique; include address, directions if needed and phone number of donor; Crim will make arrangements with Jim Hannon to schedule the pick-up
- d. For large or valuable collections, see point 5 under Other important considerations

3e. Gift is accepted – outside of RI-Eastern Mass & Eastern CT

- a. Subject specialist assesses the materials from communication with donor (phone, email, lists)
- b. While this is very rare and not encouraged, under some circumstances the subject specialist may need to travel and visit the donor to assess the materials; in that situation, the subject specialist should estimate the anticipated expenses and inquire about cost reimbursement before committing to the visit
- c. Donor is normally responsible for cost of packing/shipping
- d. Give packing directions to donor: boxes must be small (liquor size) (banker's boxes or transfile boxes are acceptable for manuscript collections)
- e. Notify Nancy, Crim, Linda and Dominique, and Manuscripts staff if applicable; include address, email and phone number of donor. Let them know when to expect the gift
- f. For large or valuable collections, see point 5 under Other important considerations

4. Purchases of new Library materials with monetary donations

Subject specialist finds out:

- amount of money the donor is willing to spend
- specific subject, language or format of works to be acquired

- wording of the bookplate; see examples at <http://dl.lib.brown.edu/bookplates/>
- names and address of donor **and** person being honored
- notifies the donor of the final amount (remember to include shipping costs) to be paid by check to: Brown University Library

Subject specialist:

- places the order with Technical Services and provides the information about bookplating (name) which will be placed in a note on the order record
- if the book is ordered through Gobi, the subject specialist includes the bookplating information in a note and puts a copy of the order in the notify folder

OTHER IMPORTANT POINTS TO CONSIDER

1. Cost of staff time to process for sale or discard
2. Value to the collection AND the potential costs for cataloging/describing/processing [Note: sometimes a donor will provide additional funds to process a gift, consult with SR and Tech Services Department Heads if you would like to request these funds]
3. Preservation costs such as storage boxes, folders, etc.
4. Packing for pick-up: If the gift is local and you want the Rock mailroom staff to pick up the gift, it must be packed in small boxes (e.g. size of photocopy paper, or a liquor box – NOT moving boxes). The mailroom limit for pick-up is 20 boxes. The mailroom van cannot bring you along – they have only one seat with a seat belt.
5. Accept large gifts (more than 20 boxes) only in consultation with Sam Streit, Dominique, and Steven E. Thompson.
6. Boston and NYC are not considered “local.”
7. Be careful of what promises you make.

APPRAISALS

Appraisals are normally the responsibility of the donor and should be arranged by the donor and conducted on the donor's premises if at all possible. The Library does not have budget or a space suitable for appraisals and cannot enter a domain that involves legal interpretations. What we can do is provide a list of appraisers and basic guidelines about tax forms. Further information needs to come from donor's accountant.

Note that materials that have been appraised have to be retained in the Library for a minimum of two years and cannot be candidates for returns to donors.

DEEDS OF GIFT

Deeds of gift transferred ownership of the collection to Brown University must be signed for all manuscript collections received. There are two types of deeds of gifts: one that transfers literary rights to Brown University and one that

allows the donor to retain the literary rights. After receiving a signed deed of gift from the donor, the subject specialist should sign it and send a photocopy of the original to the donor. The original deed of gift and any accompanying paperwork (gift report, emails, correspondence) should be given to the manuscripts staff for the accession folder .

EMAILS

Make sure to include copies to all concerned, especially Nancy and Dominique, and to use a subject line with the name of the donor.

GIFT PLATING

Electronic gift plating may be done only for special collections and at the request of the donor if it is a memorial donation. For information on bookplating consult: <http://dl.lib.brown.edu/bookplates/>

GIFT REPORTS FOR MANUSCRIPT COLLECTIONS

Make sure to fill out a gift report with all necessary information for any manuscript collections received. Give a copy of the gift report to Manuscripts staff for inclusion in the accession folder and a copy to Nancy along with a copy of the deed of gift and other pertinent information on the collection and donor for the acknowledgment letter.

LISTS

In general we do not create lists and do not advertise that we can create them. However, it can be helpful for the potential donor to provide a list to the selectors to work from.

PAPERWORK

Any paperwork received with the gift should be forwarded to Nancy Jakubowski.

TECHNICAL SERVICES

Share or prepare notes with colleagues and Nancy regarding the disposal of the gifts. Are all items preselected? Should ACs be automatically put in the booksale? What does the selector wish to review? Does donor want items returned if not wanted? (we do not encourage this)