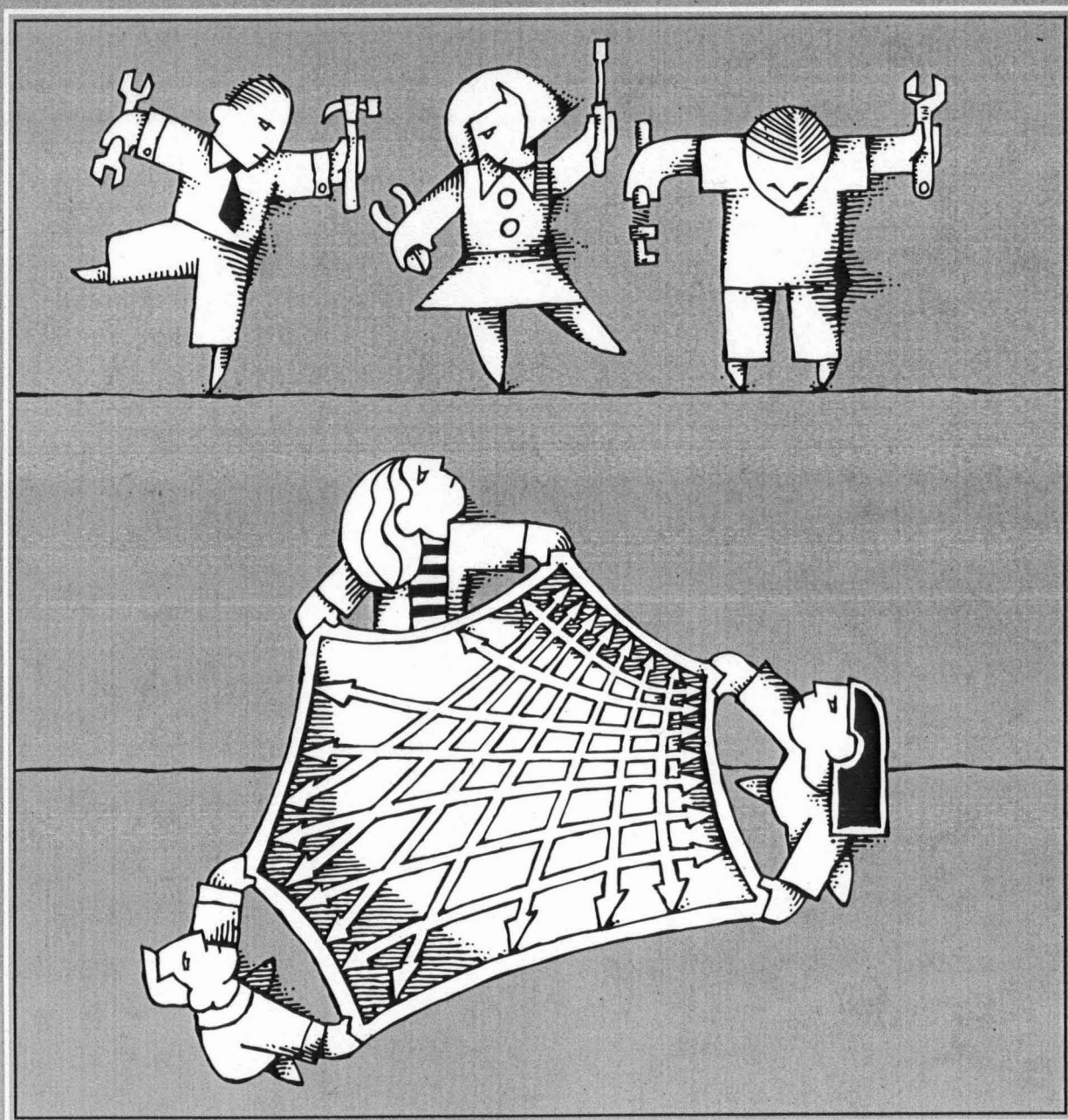


The Canadian HIV Resource Centre Network (CANNET)

Basic Manual on How to Operate an HIV Resource Centre



CANNET National Secretariat
Canadian Public Health Association

2nd Edition



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October 1999

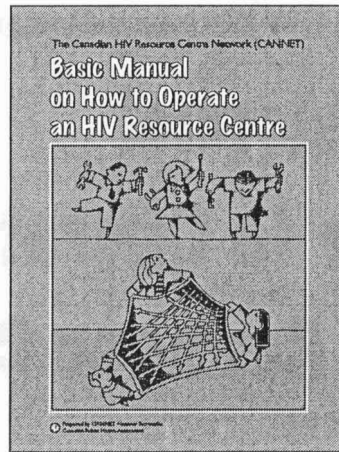
Prepared by CANNET National Secretariat



Canadian Public Health Association

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THE CANADIAN HIV RESOURCE CENTRE NETWORK (CANNET)



**Basic Manual
on How to Operate
an HIV Resource Centre**

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PREFACE

The Canadian HIV Resource Centre Network (CANNET) Secretariat is pleased to present the *Basic manual on how to operate an HIV Resource Centre*. HIV resource centres play a significant role in the Canadian HIV/AIDS community. Whether they are located in AIDS service organizations, in public health units or in national organizations, they all strive to disseminate accurate, up-to-date and much needed HIV/AIDS information to their clients.

In 1995–96, Health Canada funded the Canadian Public Health Association (CPHA) to survey Canadian HIV resource centres and assess the need for an HIV resource centre network. This first phase of the project was called *Capacity/needs assessment and pilot program: Canadian HIV Resource Centre Network*. Results of the survey showed wide support for the creation of the Canadian HIV Resource Centre Network (CANNET). The National Working Group recommended that CPHA National AIDS Clearinghouse house the infrastructure for CANNET and develop operating procedures and management guidelines for the network.

At the end of 1996, Health Canada approved the second phase of the project to develop a basic training manual and to provide workshops on HIV resource centre operations in Canada. This phase was called *Canadian HIV Resource Centre Network phase II: tools and cooperation*. CPHA National AIDS Clearinghouse has been charged with the task of putting together this training manual to assist you with your resource centre's operations.

The objective of the manual is to enable resource centre staff who have little or no formal library training to successfully operate an HIV resource centre. The manual provides information on the basic operations of an HIV resource centre. The major activities covered in the manual are the selection, acquisition, organization and processing of materials, reference and circulation services, records management and the promotion of HIV resource centres.

The first draft of the manual was reviewed by the CANNET Working Group (see list of members in Appendix 1). The

Working Group provided many suggestions to make the manual more accessible, accurate and useful to all HIV resource centres. The second draft was sent for comments to all CANNET members. They gave many useful suggestions to improve the content of the manual.

The 1999 revision was submitted to the CANNET Working Group of 1998-2000 (see list of members in Appendix 1).

The National Literacy and Health Program of the Canadian Public Health Association provided its expertise to assess and improve the readability of the manual and to ensure it was written in plain language.

We hope that this manual will help both staff and volunteers in HIV resource centres to better serve their communities. Any suggestions or comments to further improve the manual will be greatly appreciated.

Canadian HIV Resource Centre Network Secretariat

ACKNOWLEDGMENTS

This project was made possible thanks to the contribution of the following organizations:

Health Canada, AIDS Community Action Program

CANNET National Working Group

CANNET members

CPHA Canadian HIV/AIDS Clearinghouse

CPHA National Literacy and Health Program



INTRODUCTION

Audience

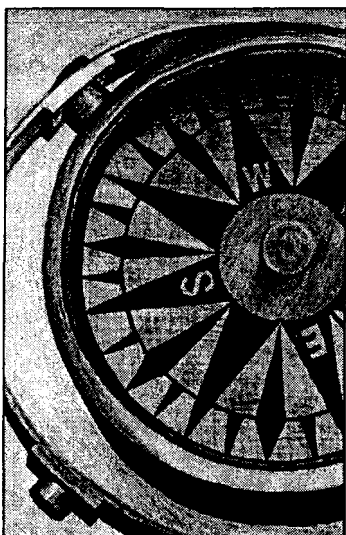
This training manual has been written specifically for CANNET member staff and volunteers who do not have formal library training, but who would like to learn more about effectively managing a resource centre.

Contents

The manual contains detailed descriptions of HIV resource centre operations which will be updated on an as-needed basis. It includes chapters on *Collection Development*, *Organizing the Collection*, *Providing Services to Your Users*, *Record Keeping/Statistics* and *Promotion*.

Some CANNET member centres were interviewed for their existing operation procedures, and their responses are included as examples in this manual. They also helped to identify problem areas in the operations of HIV resource centres.

The chapter "Record Keeping/Statistics" is especially useful because it explains how to record the importance of HIV/AIDS information to your clients, and how effectively the centre's funds are being spent.



A chapter on promotion is now included in the Manual. You will learn how to prepare a marketing plan by defining the objectives, strategies and tactics for your targeted audience. Practical advice and communication tools are also supplied to better market your HIV documentation centre.

The new chapter on database utilization explains what a database is and how it works so that you will know what it can be used for. Please download a trial version of FileMaker Pro to see how it works by following each of the steps to set up a database. Other database software, such as Access 97 and InMagic - DB/TextWorks, are also briefly described.

How to use this manual

We realize that CANNET members already have collections and some sections of this manual may not apply to you. This manual, therefore, is presented in loose-leaf format so that you do not need to read it from beginning to end all at once. You can check the *Table of Contents* and go directly to the sections you want to consult. The format also makes it easy to update parts of the manual and allows for insertion of your own policies and procedures in the corresponding section. All the sample forms in this manual are on separate pages, so you can photocopy and use them directly.

If you have any questions or suggestions, please write down your comments in the last section of the manual. The CANNET Secretariat will be asking you for them periodically.



CHAPTER 1. COLLECTION DEVELOPMENT

Although you already have materials on HIV/AIDS in your collection, you need to keep information up to date. This process is called *collection development*.

WHERE TO START: Identify the subjects you want in your collection.

Usually, your organization's mandate or mission statement and the type of questions your clients ask will guide you in this process.

LIST

Some examples of subject areas of CANNET members' collections*

- AIDS education*
- Asian*
- Caring*
- Drug issues*
- Gay/lesbian*
- General AIDS information*
- Health care work*
- Home support*
- Homophobia*
- Law & ethics*
- PWA survival*
- Positive living*
- Prevention*
- Prison issues*
- Public policy development*
- Treatment*
- Universal precautions*
- Women and HIV*
- Youth*

**This list is extracted from CANNET Phase I survey.*

EXAMPLES

- Comité des personnes atteintes du VIH du Québec (CPAVIH) serves primarily French HIV communities and its collection focuses on prevention and legal issues for PWAs.
- The principal users of Community AIDS Treatment Information's (CATIE) resource centre are information counsellors who answer a "1-800" info-line. Therefore, their resource centre collects materials on the most current information on issues such as treatment and testing.
- **MISSION STATEMENT FROM THE NOVA SCOTIA ADVISORY COMMISSION ON AIDS:**
The Nova Scotia Advisory Commission on AIDS advises the Minister of Health on matters relating to HIV and AIDS. Our job is to make sure that there is responsible action taken to:
 - *stop the spread of HIV, and*
 - *care for people with HIV and AIDS.*

Our work involves building partnerships and ongoing communication with government departments and community organizations. We study AIDS-related issues locally, provincially and nationally. We make recommendations to the Minister of Health and act as an advocate for policy change.

LIST

The following formats are found in the National AIDS Clearinghouse collection:

Bags
Balloons
Bleach kits
Bookmarks
Business cards
Buttons
Calendars
Coasters
Colouring books
Comic books
Condoms
Erasers
Exhibits
Flash cards
Flip charts
Flyers
Games
Graphics
Greeting cards
Household objects
Jewelry
Key chains
Lyrics
Leaflets
Lighters
Magnets
Match books
Models
Newsletters
Pencils
Pens
Photographs
Pocket cards
Postcards
Posters
Ribbons
Scanned image prints
Slides
Software
Sound recordings
Stamps
Stickers
T-shirts
Tabloids
Videos

How far do you go?

Some resource centres try to collect almost everything on their subject(s). These kinds of collections are called *comprehensive*. Not every centre can do this because of the cost. Some centres order only the best recommended titles on the subject. These collections are called *selective*. Others can only afford a more limited selection from among the best recommended titles. These collections are called *representative*.



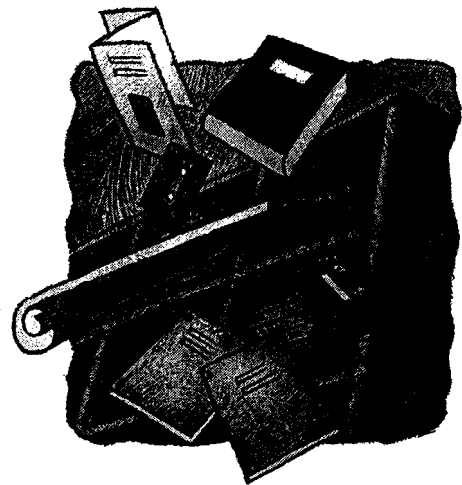
EXAMPLES

- Canadian HIV/AIDS Legal Network aims to make its collection comprehensive on the subject of legal and ethical issues.
- AIDS Committee of Windsor is selective on treatment issues while being comprehensive on gay/lesbian issues.
- The resource centre for the Village Clinic in Winnipeg has only representative materials on advocacy, human rights, care and treatment.

What formats do you need?

When you order materials for your resource centre, you also need to be aware that HIV/AIDS information is available in a wide variety of formats: books, newsletters, journals, magazines, pamphlets, posters, videos, slides, bleaching kits, condom holders and more.

You need to consider whether you have staff to manage a particular format (i.e. journals), whether your centre has the right equipment (i.e. TV, VCR) and whether you have appropriate protection measures (i.e. for videos).



What is your geographic representation?

Geographic area is another factor to consider when you order materials. You can decide where you would like your information to come from and what geographic area you would like to represent and order accordingly. For example: local, provincial, Canadian, American, European or others.

How many copies do you need?

The number of copies you order of each item depends on the cost, popularity of the item, space available in your centre and loan requirements. Most centres keep multiple copies of items which they plan to give away. They keep two copies of materials for in-house reading and loan. For more expensive materials such as books and journal subscriptions, keep only one copy.

Do you have reference tools?

When you make selections for your collection, you need to be aware of a set of materials called reference tools. Reference tools are documents for immediate and quick consultation on factual information. They are useful for quickly answering factual questions. There are several types of reference tools. The following are descriptions of some of those frequently used:

Encyclopedias

Encyclopedias are comprehensive works which give information in alphabetical or thematic order. They may be used to define subjects or keywords.



EXAMPLES

-
- ➔ Deviate, Vincent T... [et. al.] (editor). *AIDS: etiology, diagnosis, treatment and prevention*. Philadelphia: Lippincott-Raven, c1997.
 - ➔ Cohen, P.T... [et. al.] (editor). *The AIDS knowledge base: a textbook of HIV disease from the University of California, San Francisco, and the San Francisco General Hospital*. Toronto: Little, Brown and Company, 1994.
-

Dictionaries and Glossaries

Dictionaries and glossaries are collections of words arranged alphabetically with definitions and usage.



EXAMPLES

- Bolander, Alyce. Bolander, Donald O. *The New Webster's medical dictionary*. Hartford, Conn.: The Lewtan Line, c1988.
 - Harrington, Mark ... [et. al.]. *Glossary of AIDS drug trials, testing & treatment issues*. New York: ACT UP, 1988.
 - Descriptions of drugs and treatments:
<http://www.aidsnyc.org/network/drugloss.html>
-

Directories

Directories are classified and/or alphabetical lists of information on organizations or individuals to identify and locate them. Some directories are published annually, however, because they can be very expensive and usually there are not many changes, you do not necessarily have to order them each year.



EXAMPLES

- 2-Spirited People of the First Nations. *Aboriginal HIV/AIDS resource manual*. Toronto: 2-Spirited People of the First Nations, 1994.
 - AIDS Committee of Toronto (ACT). *The living guide: services for people in the Toronto Area living with HIV or AIDS*. Toronto: ACT, 1996.
 - Canadian HIV Trials Network. *Directory of HIV clinical trials in Canada*. Vancouver: Canadian HIV Trials Network. (Annual)
-

Bibliographies

Bibliographies are lists of publications on certain subjects. You can use bibliographies to identify works that have been published in a field of study.



EXAMPLE

- National Women and HIV Project. *Inventory of materials available for women living with HIV and AIDS*. Ottawa: Canadian AIDS Society, 1995.
-

Catalogues

Catalogues are lists of materials (free or cost) owned by an agency/organization. Catalogues are usually used to order materials.



EXAMPLES

- Canadian Public Health Association (CPHA). *Video & audio: loans guide*. Ottawa: CPHA, 1994.
 - Canadian Public Health Association (CPHA). *National AIDS Clearinghouse catalogue*. Ottawa: CPHA. (Annual)
-

Handbooks

A handbook is a concise reference book covering a particular subject.



EXAMPLE

- Project Inform. *The HIV drug book: Project Inform's comprehensive illustrated guide to the most-used HIV/AIDS treatments*. New York: Pocket Books, c1995.

Where do you find new materials (free or cost)?

Information about new materials can be found in:

- HIV/AIDS journals (i.e. *AIDS book review journal*)
- newsletters
- publishers' catalogues
- electronic journals
- conferences
- committees and task forces
- bibliographies prepared by other HIV/AIDS information projects or resource centres.

Some resource centres such as the National AIDS Clearinghouse publish their own catalogues for free and priced materials.

Many centres interviewed reported that they acquired HIV/AIDS information through various suppliers, including bookstores.

Here are some sample suppliers of HIV/AIDS information:

- | | |
|--|--|
| <ul style="list-style-type: none"> ● CDC National AIDS Clearinghouse
1600 Research Blvd.
Rockville, MD 20850
U.S.A.
Tel: (800) 458-5231,
Fax: (301) 738-6616 | <ul style="list-style-type: none"> ● Sunburst
920 Mercer Street
Windsor, ON N9A 7C2
Canada
Tel: (800) 431-1934,
Fax: (519) 971-2712 |
| <ul style="list-style-type: none"> ● Centre régional d'information et de prévention du sida (CRIPS)
13 rue Faidherbe
59046 Lille Cedex
France
Tel: (011) 03-20-15-49-10,
Fax: (011) 03-20-15-49-01 | <ul style="list-style-type: none"> ● University of Toronto Press
5201 Dufferin Street
Downsview, ON M3H 5T8
Canada
Tel: (800) 565-9523,
Fax: (416) 667-7832 |
| <ul style="list-style-type: none"> ● Joint United Nations Program on HIV/AIDS (UNAIDS) World Health Organization
CH-1211
20 Appia Avenue
Geneva, 27
Switzerland
Tel: (011) 41-22-791-4509,
Fax: (011) 41-22-791-4179 | <ul style="list-style-type: none"> ● World Health Organization
Geneva (Headquarters):
1211 Geneva 27
Switzerland
Tel: (011) 41-22-791-2111 |
| <ul style="list-style-type: none"> ● National AIDS Clearinghouse Canadian Public Health Association
400 - 1565 Carling Avenue
Ottawa, ON K1Z 8R1
Canada
Tel: (613) 725-3434,
Fax: (613) 725-1205 | <ul style="list-style-type: none"> ● Health Resources Centre Canadian Public Health Association
(Distributor of WHO and PAHO Publications)
400 - 1565 Carling Avenue
Ottawa, ON K1Z 8R1, Canada
Tel: (613) 725-3769,
Fax: (613) 725-9826 |



TIP Some publishers offer their own order form which you can use. But it is much easier for filing purposes if you use your own order form all the time. It also ensures **CONSISTENCY**.

How to order HIV/AIDS materials?

Before ordering, check if the document is already in your collection or if an order has already been sent.

You can order HIV/AIDS materials from local bookstores, directly from the publishers, or from other HIV/AIDS resource centres. Whichever source is used, you need to use a standard order form and include the correct ordering information on that form. You need to keep a copy of the order form in an *On order* file as well. • See the sample order form at the end of this chapter.

Once the document is received, you need to check it against the information on the order form and the invoice to make sure that the parcel contains what it is supposed to and that quantities, prices and formats are correct. Then you can mark *Received* on the order form and transfer it from the *On order* file to the *Received* file.

Payment

The final step is to pay the invoices. You can pay invoices as they arrive or pay them periodically. For example, you could choose to pay invoices on the last day of each month.



TIP Some local book stores give discounts to non-profit agencies. Use your communication skills. Let them know who you are and what you need. Always ask for deals!

Discarding materials

Most of the resource centres interviewed have not discarded any materials. However, in a resource centre, the collection does need to be continually evaluated and materials may need to be eliminated from areas where they are taking space that is needed for new and more useful materials.

Here are some helpful criteria for discarding materials:



TIP Other resource centres may want documents that you don't want. Before you throw them away, consider putting a list of the materials in the *CANNET* newsletter.

- condition of the material: worn, damaged or fragile
- frequency of use: never or rarely used
- unnecessary multiple copies
- outdated information
- incomplete sets, kits, or other multipart items for which replacement components are not available
- availability of materials elsewhere
- old editions/versions where you have the newer one in your collection.

ORDER FORM

Purchase Order Number: _____ Date ordered _____ Date Received _____

Catalogue Number	Title	Author	ISBN ISSN	Quantity	Cost	Shipping & Handling	Total
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	_____	_____	\$ _____

SUPPLIER

Name: _____
 Address: _____

 City: _____ Province: _____ Postal Code: _____
 Telephone: _____
 Fax: _____
 Email: _____

Subtotal \$ _____
 8% PST if applicable \$ _____
 7% GST if applicable \$ _____
 Total \$ _____

Charge my VISA Mastercard (if applicable)

Acc No. _____ Exp. Date _____ Signature _____ Date _____

BILL TO:

Name: _____ Agency: _____
 Address: _____ City: _____ Province: _____
 Postal Code: _____ Telephone: _____ Fax: _____ Email: _____

SHIP TO: (If different from billing address)

Name: _____ Agency: _____
 Address: _____ City: _____ Province: _____
 Postal Code: _____ Telephone: _____ Fax: _____ Email: _____

Assessing Information on the Internet

Assessing web page content

- Is it easy to identify the author(s)?
- Is it the work of one person or of a team?
- When was the page last updated?
- Is the purpose of the site well defined?
- Is the target audience well identified?
- Is the content well structured or organized?
- Is the information accurate and up to date?
- Is the information answering your needs? Is it what you are looking for? Is it pertinent?
- How does it compare with similar web sites?
- Does it provide interesting links?
- Is there a table of contents or a site map?
- Is it easy to use?
- Is it easy to find information?

Assessing web page design and layout

- Is it attractive?
- How effective is the multimedia? Is there a balance between graphics, sound, animation and text?
- Is the web page loading fast enough?
- How does it appear? Full and dense or clear and simple?
- Is this site an award winner?
- Is there a site map?

Selection

How to evaluate books, reports, materials, to know they are a worthwhile purchase, or correspond to your needs.

Reputation of the author

Look at previous books published to determine an author's importance in the field.

Subject

Does the subject fit in the collection?

Significance

What is this book's place among the others?

Purpose

Does the author accomplish the purpose he has set out in the preface?

Author's point of view

Is it conservative, radical, observer, insider's view?

Treatment of the material or audience

What level of audience is it intended for (scholars, laymen, professionals, students)? Is it practical, theoretical, detailed, superficial, or popular?

Structure

This is the organization of the content of the book. Do the ideas follow, is it clear, well organized, unified or apt?

Accuracy and up-to-dateness

Are the facts accurate, scientific, researched material? Is the information out of date?

Interest to the readers

Is the book needed for instructional purposes, for research, for education or entertainment?

Physical format

Is there a table of contents, illustrations, an index, cross references, a glossary, graphs, is it useful, comprehensible, logical?

SAMPLE OF A COLLECTION DEVELOPMENT POLICY

**Victoria Persons With AIDS Society
Library Collections Development Policy**

Mandate:

The VPWAS Library is a community-based, publicly accessible, specialized collection of information on health promotion, treatment and self-care strategies aimed at persons living with HIV/AIDS, their care team(s), and our community partners.

Users:

The primary users of the Library are people living with HIV/AIDS, their care team and/or advocates. Other users include health-care professionals and students of the health sciences.

Subjects:

Subjects include

- all aspects of HIV disease pathogenesis;
- current treatment strategies (focusing on, but not restricted to, evidence-based outcomes using clinical trials designed according to established scientific procedures);
- complementary and alternative therapies that claim (whether substantiated or not) to have a beneficial effect on HIV disease progression and/or symptom management. Only those modalities that are specific to HIV/AIDS will be covered;
- causes and clinical manifestations of disease progression;
- nutritional information specific for people with HIV/AIDS;
- specific self-care, health-enhancing strategies for people living with HIV/AIDS;
- pharmacology/toxicology of drugs for HIV/AIDS and associated conditions;
- information on actively recruiting clinical drug trials;
- treatment issues of interest to adult women (including pregnancy).

Subjects specifically not covered include pediatric treatment issues and broad-based (i.e., general and not specific to HIV/AIDS) health promotion modalities.

Formats:

- a) newsletters, periodicals, journals
- b) vertical files
- c) videos
- d) reference books
- e) "fact sheet", booklet and brochure hand-outs

Levels of the Collection:

Comprehensive and current. Information is collected from the basic, elementary level to the most advanced, technical levels in the subject areas mentioned above.

Retrospective Collection:

The collection is not an archive; it will contain current information only. De-accessioning of out-dated material will take place on at least an annual basis.

Gifts:

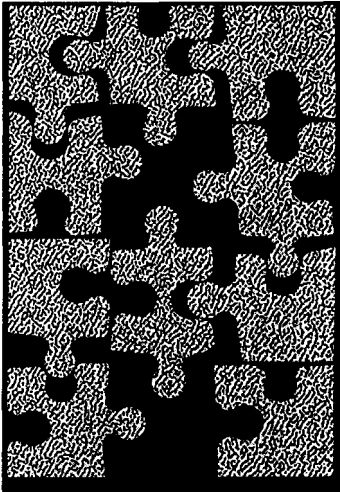
The Library will solicit and accept unrestricted financial bequests and grants for the maintenance of its collections. Unsolicited material will be subject to the guidelines above.

Complaints:

The Executive Director will deal with complaints.



CHAPTER 2. ORGANIZING THE COLLECTION



Organizing the collection is the biggest challenge for all HIV resource centres. Some of the centres have an unorganized collection. Other collections are organized but not in a way where users can easily locate what they are looking for.

There are no absolute rules about how you organize your collection. No matter how you do it, **CONSISTENCY** is very important. Write down the procedure and insert it in this manual to ensure that everyone who looks after your resource centre will follow the same procedure.

The following steps may help you make new documents ready for use:

Step 1. Describe the document (cataloguing)

When you receive a document, the first thing to do is to describe it. What kind of information you want to describe depends on your staff's training and time, the size of your collection and other information such as the interests of your user group.

What to include?

Information which you may want to include:

- author
- title
- publisher
- place of publication
- copyright/publication date
- physical description
 - number of volumes if more than one
 - number of pages
 - number of items, format, colour and size for audiovisual materials
- date of purchase
- format (for non-book materials such as video, poster and software).



TIP Some documents are already catalogued by library professionals at the time of publishing. The descriptions are usually located on the page with copyright date (or other pages close to this page). This is called **Cataloguing in Publications (or CIP)**. In this case, you can just copy this description. This saves a lot of time.

Where to look for the information?

The information needed to describe an item should be taken from the item itself. The title page of a book or printed music text, the title frames of a filmstrip or microform, the label on a sound recording, the title screen of a computer file or the equivalent should tell you what you need to know.

Step 2. Describe the contents of the document (cataloguing)

The second step is to find out what the subjects of the document are. You will probably find that assigning subjects is the most difficult task. You can find out the subjects through a summary or abstract, table of contents, major chapters and the conclusion.

What terms do you use as subjects? There are two ways to determine what they will be:

Option 1: List of subject headings

Some HIV/AIDS resource centres keep a simple alphabetical list of standard terms/keywords/subjects as a reference. They use the terms in the list to describe the contents of the document. This assures **CONSISTENCY**. This list needs to be updated continually.

Ensure that everyone is using the list when they describe the content of a document.

Option 2: Thesaurus

Other HIV/AIDS resource centres use a *Thesaurus* as a reference tool when assigning subjects. A thesaurus contains information on preferred and non-preferred terms, relationships between terms and tips on how, when and/or where to use preferred terms.



TIP You can always ask the library professionals working at other CANNET member centres for help.

Some resource centres use a published thesaurus.



EXAMPLES

- Centre régional d'information et de prévention du sida (CRIPS). *European thesaurus on AIDS and HIV infection: structured: alphabetical list: English, French*. Paris: CRIPS, 1995.
 - Community AIDS Treatment Information Exchange (CATIE). *HIV/AIDS treatment thesaurus*. Toronto: CATIE, c1996.
 - Huber, Jeffrey. Gillaspay, Mary. *HIV and AIDS – related terminology: a means of organizing the body of knowledge*. New York: The Haworth Press, 1996.
-

Thesaurus components

Some resource centres construct their own thesaurus. To do so, you have to know the components of a thesaurus. An entry may include as many as six parts:

- preferred term — term to be used
- scope note (SN) — description of how/when/where to use the preferred term
- broader term (BT), narrower term (NT) and related term (RT) — relationship of the preferred term with other preferred terms
- non-preferred terms (UF) — term not to be used.



EXAMPLES

AZT

UF Azidothymidine

BT Antiviral drugs

RT Clinical trials

"Azidothymidine" is a term that should not be used when you assign the subject.

"Antiviral drugs" is a broader term that includes the preferred term "AZT"

"Clinical trials" is a term related/similar to the preferred term "AZT."

Diagnostic tests

NT Blood tests

RT Diagnosis

"Blood test" is a member of a class of concepts "Diagnostic test."

Needle sharing

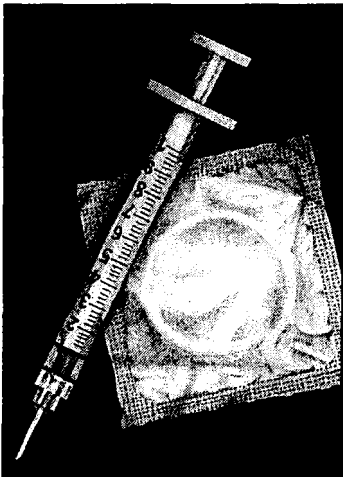
SN The sharing of needles among individuals.

BT Risk factors

RT Drug abuse

The scope note "The sharing of needles among individuals" describes how the term "needle sharing" is used.

"Risk factors" indicates the broad concept of which the term "needle sharing" is a part.



What components to include in YOUR thesaurus and how to do it depend on the subject of your collection, your staff and your user group. CONSISTENCY, however, is the key to make it work.



EXAMPLES

In AIDS Vancouver's Pacific AIDS Resource Centre (PARC) Library's thesaurus, the entry on "Antibody testing" is like this:

ANTIBODY TESTING

see also SCREENING-BLOOD SUPPLY

SCOPE: Information about any type of test for antibodies for HIV (including Home Tests), efficacy of such tests, administration, confidentiality and exploration

The entry in CATIE's thesaurus looks like this:

Antibody tests

- * EV Analyse des anticorps
- BT Blood tests
- NT ELISA
 - IFA
 - Rapid screening tests
 - RIPA
 - Western blot test
- RT Antibodies
 - Plasma cells
 - Primary HIV infection
 - Toxoplasmosis

* CATIE defines EV as the equivalent term in French.

Thesaurus maintenance and updating

The thesaurus must be updated regularly to keep up with the progress made in the HIV/AIDS field. Changes are to be made in three areas: adding new terms and deleting or amending existing terms.

Step 3. Assigning call numbers (classification)

After you have described the document, you need to assign a number, letter, and/or symbol to the item so that it can be shelved or filed. This set of letters and numbers is named a *call number*. The call number of each document in the collection has to be unique. The process of assigning call numbers is called *classification* in library science.

A call number reflects the arrangement of your collection. The following are brief descriptions of different methods of arranging the collection by CANNET member centres. As a result, different centres will assign different call numbers to the same document.

In-house classification systems

Arranging HIV/AIDS information is very different from other subject areas because HIV/AIDS information is available in many different formats and almost any document published is quickly outdated. Most CANNET member centres developed their own classification systems to suit their particular needs.



EXAMPLES

- Asian Community AIDS Services arranges its materials first by subject, then by alphabetical order of the author.
- AIDS Calgary has its materials arranged first by format, then by alphabetical order of the title.
- AIDS Committee of Toronto described its classification system in *HIV/AIDS information classification scheme and index: for the information files in the resource centre at the AIDS Committee of Toronto* (Toronto: AIDS Committee of Toronto, c1990).
- National AIDS Clearinghouse arranges its collection first by format, then by place of publication, then by the order the document entered its collection and finally by the number of copies.

The Dewey Decimal Classification (DDC) system

Some HIV/AIDS resource centres use the DDC system. This system is most commonly used in public libraries. It is a numerical classification scheme.

The Library of Congress (LC) Classification system

Some CANNET member centres use the LC Classification system. This system is found mostly in university libraries. It is an alphanumeric classification scheme.

TIP



If you use the DDC or LC classification systems, you can copy cataloguing from other public or university libraries



EXAMPLES

- The document *The AIDS knowledge base: a textbook of HIV disease from the University of California, San Francisco, and the San Francisco General Hospital* in the National AIDS Clearinghouse's collection has the call number "M USA 9098 C.1." (9098 is a unique sequential number assigned to the document at time of processing. The larger the number, the more recently the document has entered the collection.)
- CATIE uses the DDC system. In CATIE's collection, the above document has the call number "616.9792 A288 1994."
- PARC uses a modified version of LC. In its collection, the same document has the call number "C 300 COH 1996."

**LIST**

Software used by CANNET members to store their catalogues:

Library specific software:

DRA Library System
Eloquent Librarian
InMagic
Key Librarian 2.2
NOTIS
Procite
Reference Manager

Custom systems:

Advanced Revelation
Alpha Four
CENTDOC
Dbase 4
Filemaker Pro
Foxbase
Paradox

Wordprocessing software:

Microsoft Word
WordPerfect

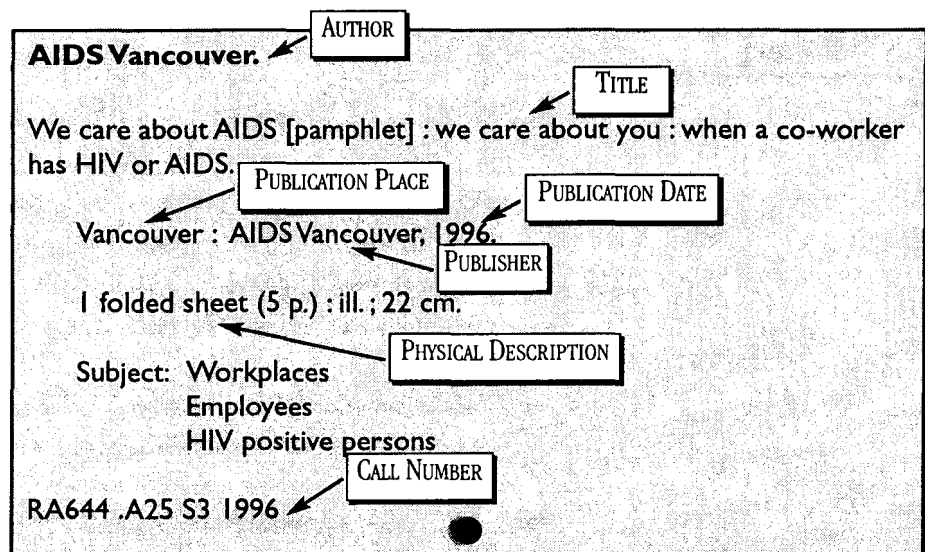
TIP

You can always ask the library professionals working at other CANNET member centres for help.

Step 4. Add the record in your catalogue

At this stage, you have a complete record of the document you just received. Now you need to add this record to your list of existing records in your resource centre. This list is also called a *catalogue*. In the catalogue, each entry is filed in a recognized order, usually by author or title, and contains information about each document. With the catalogue, the user can get a pretty good idea of what the document is about and can locate it.

The following is a sample entry in a catalogue:

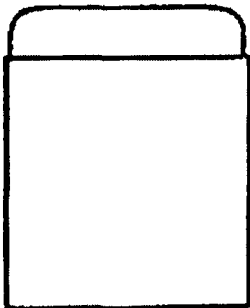


Some resource centres have their catalogue in print format as a *card catalogue*. Others have it in electronic format as a *computer catalogue*.

Bilingual date due slip

DATE DUE DATE DE RETOUR	

Book Pocket



Step 5. Physical processing

Now you are ready to process the documents and put them on the shelves. How you process the documents is your choice as well, and CONSISTENCY is the key.

The following are four sample operations to process the documents:

- Paste in the book pocket and insert the date due slip in the book pocket. Do this when you offer circulation service. You can get self-adhesive or pre-gummed pockets. Attach ungummed pockets by applying glue along the edge of the pocket. Book pockets are usually pasted on the front fly leaf of a book. A separate date due slip is used to avoid pressure of a date stamp on the book.
- Place the mark of ownership. The name of the resource centre and the address should be stamped on the document.
- Mark the spine with a call number. The call number may be written directly on the spine of the document (if there is one), or it can be typed or written on labels and applied to the document.
- Cover the document with a plastic jacket cover. This is optional, but is recommended to protect your more valuable and popular documents. A sheet protector (a plastic envelope for storage in 3-ring binder) is also recommended for easier storage of small-size items such as coasters, buttons and ribbons.

LIST

Sample suppliers from whom you can order the equipment:

Brodart

109 Roy Boulevard
Brantford, ON N3R 7K1
Tel: (800) 265-8470,
Fax: (800) 363-0483

Bibliofiche

9630 TransCanada
Highway,
Montreal, QC H4S 1V9
Tel: (514) 336-4340,
Fax: (514) 336-8217

Carr McLean

Tel: (800) 268-2138,
Fax: (416) 252-9203

Grand & Toy

Tel: (800) 267-0394,
Fax: (800) 636-2477

Business Depot

Tel: (800) 263-5741

Note: Some of these stores are nationwide. Check your local telephone listing for location.

TIP

CANNET does group purchasing for members and can get good discounts on specific products. Let the

CANNET Secretariat know your needs. If enough members are interested in a specific product, the Secretariat could coordinate the purchase on behalf of the members.

Issues to be considered

There are some issues which need to be considered when you arrange your collection.

Vertical Files

- Vertical Files usually contain pamphlets, brochures, magazine articles & newspaper clippings.
- Vertical Files are usually kept in filing cabinets or boxes.
- It is an easy way to store CURRENT information.
- The Source should be indicated on each document file for citation purposes and filing.
- Vertical Files can be filed by keyword, subject, region, colour, format, etc.

TIP

KEEP IT SIMPLE
KEEP IT CURRENT

Furniture and equipment

Of course, you need furniture and equipment in your resource centre. Choose your furniture and equipment to fit the size and nature of your resource centre and the anticipated use of the centre. You also need to consider the accessibility for challenged people.

The following are some suggestions for basic requirements:

- adequate lighting
- book shelves
- bulletin board
- check out/in desk
- computer
- fax machine
- magazine and newspaper racks
- overhead/slide projector
- photocopier

TIP

You can get free or discounted equipment from government or private sector surplus.

Auctions are also a good place to go.

- reading tables and chairs
- supply cabinet or closet
- telephone
- TV
- VCR
- vertical file cabinet.

Display

Laying out materials such as new acquisitions, frequently consulted reference tools, free pamphlets and current HIV/AIDS journals/magazines can attract users' attention quickly and easily.

Preferably, the resource centre should have a piece of furniture or a table for display purposes. The display rack should be clearly visible and bear signs such as *New Arrivals*, *Free to Take* and *Reference Tools*. It is also important to change the display frequently to stimulate users' interest.

TIP

Some pharmaceutical companies accept funding applications for furniture and equipment.

LIST**Sample Signage:**

Check out
Return
Internet
Washroom
Copier with cost information

Preservation, conservation and storage

When you decide where to store the materials and what equipment to use for storage, you need to consider preservation factors. For example, you may want to keep the videos away from the heating system, laminate the circulation posters and adjust the humidity of your centre. If you provide a reading room, you may not want to allow users to drink coffee or eat food. You may also want to archive the old files which cannot be thrown out and store them offsite, which might be cheaper than storing them in your centre.



CHAPTER 3. PROVIDING SERVICES TO YOUR USERS

This chapter discusses three main services: circulation (lending your collection to your users), interlibrary loan (borrowing from each other's collections), and answering questions.

Circulation

You can decide whether or not your centre will circulate its collection. This decision is based on your mandate, user group, staffing, space/location, security and/or whether your collection is organized.

If you decide not to circulate the materials, you may consider providing space for onsite reading and studying, and providing photocopying facilities.



EXAMPLES

- The Canadian HIV/AIDS Legal Network does not circulate its materials because of its limited resources.
- CATIE does not circulate because it provides photocopying services and space for onsite consultation.

Circulation policy

If you choose to circulate your materials, you will need a circulation policy and procedures. In your circulation policy, you need to provide guidelines on some basic issues:

- who has borrowing privileges
- how many documents one person can check out
- how long the loan period is
- which documents will not circulate (for example, reference tools and magazines)
- if users can renew their loans and how long the renewal period is
- what are the penalties for overdue items.

Some centres ask for a deposit to borrow. Some require the user to buy a borrowing card.

Circulation procedure

Some centres use card circulation systems and others use electronic sign in/out systems.

The following is a sample procedure for centres that use card systems:

Check-out

- a. register the borrower
- b. stamp the transaction card for due date
- c. change the status of the document to *on loan* in the catalogue*

Check-in

- a. check the stamp on the pocket
 - if overdue, ask the user to pay the fine
- b. change the status of the document to *available* in the catalogue *

Renewal

- a. check the stamp on the pocket.
 - if overdue, ask the user to pay the fine first
- b. check the reserve list
 - if the item is on the reserve list, they cannot renew
 - if it is not on the list, stamp the card for a new due date

* *Some centres that do not have their catalogue computerized keep a check-out list showing the borrower's name, call number or title and due date. When the item is returned, the borrower's name is crossed off. This list can be used for statistical purposes.*

☛ *See sample user registration form at the end of this chapter.*

Interlibrary loan

You will have to decide

- if you will lend materials to other resource centres
- who may borrow materials
- which documents can be borrowed
- if copyright law applies when photocopies are made
- what is the limit on the number of documents to be borrowed
- what is the loan period
- what is the turnaround time (time needed for processing)
- what is the cost
- if there is an overdue penalty.

Procedure for borrowing documents

Even if you do not lend materials to other centres, you can still borrow materials from other centres (e.g. National AIDS Clearinghouse, or university, public or government libraries).

When requesting documents, you must collect the information (author, title, date, etc.) about the document as accurately and as completely as possible.

Fill in the interlibrary loan request form.

☛ *See sample interlibrary loan form at the end of this chapter.*

Once the document is received, identify the item as an inter-library loan item, for example, by a yellow paper band which shows the name of the lending library and the due date.

The user must abide by the due date. The borrowing centre will return the document to the lending centre by mail.

Procedure for lending documents

Upon receiving a request from another resource centre, follow the circulation procedure described earlier. In this case, the borrower is the other centre instead of an individual. Send the document to the other centre by mail or let the other centre pick it up where possible.



Answering questions

You will probably answer questions in different ways: by letter, fax, e-mail, phone or in person. Whichever method you use, the process of answering questions is similar. To best help your users, you need to have a good attitude and knowledge of your collection and your organization.

Process of answering questions

Your users may ask different questions, but the process of answering these questions is always the same:

Step 1. The user asks you the question.

Step 2. You clarify the question. This is the most important step, and requires learning interviewing techniques. This step is also called the *reference interview*.

Reference interview

a) What does the user want to know?

Users are often unclear about their information needs. It is important to take time to determine the user's actual question.

Asking open-ended questions, such as "Can you tell me more about what you need?" encourages the user to give you as much information as s/he has about the topic or question so that you are better equipped to respond effectively.

Avoid closed-ended questions such as "Do you just want condom information?" which can only be answered with a "yes" or "no."



EXAMPLES

➤ The User: "Can I get some information on HIV/AIDS?"

A closed question: "Do you want information on treatment?"

An open question: "What aspects of HIV/AIDS do you want information on?"

TIP

There are times when there is no answer to the question. For example, if someone asks you how many

AIDS organizations there are in Canada, you cannot provide an answer because such information does not exist yet. CANNET Secretariat is working on a Canadian AIDS organizations directory.

- b) In what format(s) (e.g. videos, posters, articles) does the user want the information?

Often the user needs information in more than one format.

- c) How much information does the user want?

Sometimes a two-page report is sufficient and other times the user needs everything on the topic. Based on the extent of the information needed, you may determine the amount of time you will spend on the question with the user.

- d) How much does the user already know about the subject?

This will help you to determine what kind of sources you can use and avoid duplication. For example, you do not want to give a user who is a doctor a medical dictionary.

- e) Why does the user want to know?

This is usually awkward and difficult to ask, but sometimes very helpful in determining the user's information needs and how best to meet those needs.

Step 3. Translate the question into subjects, keywords or thesaurus terms which will help you retrieve the information.

Step 4. Devise a search strategy about where to look for the required information.

Step 5. Search the collection and evaluate the pertinence of the materials you find.

Step 6. Give the appropriate materials to the user.

Step 7. Check to see if the information meets the user's needs and encourage the user to contact you if s/he requires further information.

Referral

You may not always be able to answer the user's question because of the limitations of your collection. In this case, you can refer the user's question to the resource centre which contains appropriate materials. The CANNET Web site, National AIDS Clearinghouse and other CANNET members are always good places for referrals.



EXAMPLES

- Someone in Calgary is planning to submit a proposal to Health Canada for a project on producing a document on HIV/AIDS and pregnant women. The person calls AIDS Calgary for a comprehensive list of documents already published on this subject. AIDS Calgary may then refer this user directly to the National AIDS Clearinghouse because the Clearinghouse has the most comprehensive collection on prevention and education.

Electronic search steps

During the process of answering questions, you may decide to do a search on an electronic catalogue, CD-ROM, online database or the Internet. The following steps may help you with online searching:

- a) Identify the ideas/concepts contained in the user's question, determine the primary and secondary concepts and the restrictions (language, date of publication, etc.).
- b) Choose the right source to search depending on what databases are available at your centre.
- c) Translate the concepts into the search terms (keywords, subject headings, thesaurus terms) used by the electronic source.
- d) Start online searching.
- e) Analyze the search results.
- f) Revise the search terms, if necessary, according to the results.
- g) Present the final results to the user.

TIP

If you let the users do the search themselves, post the steps on the wall close to the station.



HIV/AIDS on the World Wide Web

There is more and more HIV/AIDS information available on the Internet. It has become more important to consider the Internet as part of your collection. Many CANNET member centres have access to the Internet.

All Internet sites are connected to each other, one way or another. Once you get to one site, you should be able to get to other Internet sites. Or you can go to one of the addresses of a search engine and search for "HIV and AIDS." Bookmark your favorite sites, so you can go to these sites directly next time.



EXAMPLES

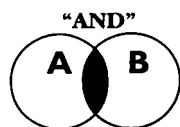
- Addresses for some English search engines:
<http://www.yahoo.com>, <http://www.netscape.com>.
- Addresses for some French search engines:
<http://www2.ccim.be/>, <http://index.qc.ca>
- The CANNET Web site (<http://www.cpha.ca/cannet.html>) will have search engine capability. We will let all the members know once it is running.

TIP



BOOLEAN OPERATORS

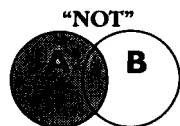
When available, use the Boolean operators



to **narrow** the search,



to **broaden** the search,



to **eliminate some part** of the search.

Searching on the Internet is similar to searching online databases. However, some search engines do not have the function of Boolean operators. Therefore, if you want to get more information on one subject, you need to search under various synonyms.



EXAMPLES

- For example, if you want information on "HIV prevention," you have to search under the concepts "HIV prevention", "condom", "bleach" and related terms to get all the information.

Here are some of the World Wide Web addresses on HIV/AIDS (Internet addresses are changing constantly. Please feel free to make the necessary changes):

CANADA

- **Canadian HIV/AIDS Clearinghouse**
<http://www.cpha.ca>
- **Canadian HIV/AIDS Resource Centre Network (CANNET)**
<http://www.cpha.ca./cannet.htm>

- AIDS Foundation of Canada
<http://www.aidsfoundation.ca>
- AIDS Prevention Links: Health Care Information Resources
<http://www-hsl.mcmaster.ca/tomflem/aidsprev.html>
- Canadian Aboriginal AIDS Network (CAAN)
<http://www.caan.ca>
- Canadian AIDS Society
<http://www.cdn aids.ca/>
- Canadian HIV/AIDS Care Giving Professionals (CHAP)
<http://www.cfeweb.hivnet.ubc.ca/CHAP/CHAP.html>
- Canadian HIV/AIDS Legal Network
<http://www.aidslaw.ca>
- Canadian HIV Trials Network
<http://www.hivnet.ubc.ca/ctn.html>
- Canadian Foundation for AIDS Research (CANFAR)
<http://www.canfar.com/>
- Community AIDS Treatment Information Exchange
<http://www.catie.ca/>
- Disease Surveillance On-Line
<http://www.hc-sc.gc.ca/hpb/lcdc/webmap/>
- Health Canada. Bureau of HIV/AIDS and STDs
http://www.hc-sc.gc.ca/hpb/lcdc/bah/epi/epi_e.html
- HIV/AIDS Epi Updates
http://www.hwc.ca/hpb/lcdc/bah/epi/epi_e.html
- Laboratory Centre for Disease Control
<http://www.hwc.ca/hpb/lcdc/>
- McGill AIDS Centre
<http://www.mcgill.ca/jgh/aids/aids.htm>
- Southern Alberta Clinic (SAC)
<http://xweb.crha-health.ab.ca/clin/sac/sac.htm>
- The Toronto Hospital HIV/AIDS Clinic
<http://www.tthivclinic.com/>

PROVINCES

Atlantic Region

- AIDS New Brunswick
<http://www.aidsnb.com>
- AIDS St. John
http://www.sjfn.nb.ca/Community_Hall/A/aids2437.html
- Atlantic First Nations AIDS Task Force
<http://is2.dal.ca/~kent/afnatf/>
- Atlantic Regional HIV/AIDS Treatment information Project
<http://home.istar.ca/~gcurtis/ARTIP.html>

Quebec

- The Center for AIDS Services of Montreal
<http://netrover.com/~casm/>
- COCQ-Sida
<http://pages.infinit.net/cocqsida/index.htm>
- Concordia University Libraries
<http://juno.concordia.ca/collections/subjpages>
- CPAVIH
<http://www.cpavih.qc.ca>
- INFO SIDA Quebec
<http://orenoque.com/infosida.htm>
- Le Regroupement des personnes vivant avec le VIH-sida du Québec et de la région.
<http://www.mediom.qc.ca/~rpvvih>
- SIDAIDE
<http://www.infose.com/com/sidaide/>
- Sida-vie
<http://www.lavalnet.qc.ca/sidavie>
- Le Village AIDSIDA
<http://www.aidsida.org/>

Ontario

- AIDS Committee of Guelph & Wellington County
<http://www.aids.guelph.org/>
- AIDS Committee of London
<http://commplus.net/acol/>
- AIDS Committee of Ottawa
<http://inasec.ca/com/aco>
- AIDS Committee of Simcoe County
<http://www.bconnex.net/~acsc/>
- AIDS Committee of Sudbury
<http://www.cyberbeach.net/~access/>
- AIDS Committee of Toronto (ACT)
<http://www.actoronto.org/home.nsf/>
- AIDS Committee of Windsor
<http://www.mnsi.net/~aidscw/>
- ASAP Alliance for South Asian AIDS
<http://www.interlog.com/~aids/>
- Toronto People with AIDS Foundation
<http://www.gaytoronto.com/pwa/>
- Valley AIDS Concern Group
<http://www.valleyweb.com/valleyaidsgroup/>

Pacific Region

- AIDS Vancouver
<http://www.aidsvancouver.bc.ca/>
- AIDS Vancouver Island
<http://www.avi.org>
- British Columbia Centre for Excellence in HIV/AIDS
<http://cfeweb.hivnet.ubc.ca/cfe.html>
- British Columbia Persons with AIDS
<http://www.bcpwa.org/>
- A Loving Spoonful
<http://www.netfinder.com/spoonful/meals.html>
- North Island AIDS Coalition
<http://mars.ark.com/~niac/>
- The Red Road HIV/AIDS Network
<http://www.red-road.org>
- The Vanguard Project
<http://cfeweb.hivnet.ubc.ca/Vanguard/project.html>
- Victoria AIDS Respite Care Society
<http://www.islandnet.com/~varcs/homepage.htm>
- Victoria Persons with AIDS Society
<http://www.geocities.com/HotSprings/8792/index.html>

Prairies

- AIDS Calgary Awareness Association
<http://www.nucleus.com/~aids-calgary/>
- AIDS Network of Edmonton Society
<http://www.connect.ab.ca/~anoes/>
- The Edmonton Persons Living with HIV Society
<http://www.connect.ab.ca/~livepos/>
- Lethbridge AIDS Connection
<http://www.bulli.com/~leth aids>
- University of Alberta Health Information Page
<http://www.ualberta.ca/healthinfo>

UNITED STATES

- The Body
<http://www.thebody.com/safesex/general.html>
- California AIDS Clearinghouse
<http://www.hivinfo.org/>
- The Center for AIDS Prevention Studies (CAPS)
<http://www.caps.ucsf.edu/capsweb>
- Critical Path AIDS Project
<http://www.critpath.org/prevent.htm>
- Division of HIV/AIDS Prevention (DHAP) Home Page
http://www.cdc.gov/nchstp/hiv_aids/dhap.htm
- HIV Insite
<http://hivinsite.ucsf.edu/prevention>
- JAMA HIV/AIDS Information Centre
<http://www.ama-assn.org/special/hiv/preventn/preventn.htm>
- Johns Hopkins AIDS Service
<http://www.hopkins-aids.edu/>
- Managing Desire: HIV Prevention Strategies for the 21st Century
<http://www.managingdesire.org/>
- National Center for HIV, STD, and TB Prevention (NCHSTP)
<http://www.cdc.gov/nchstp/od/nchstp.html>
- Santa Cruz AIDS Project Homepage
<http://www.scapsite.org/ep/education.html>

INTERNATIONAL

- XIIth Conference
<http://www.aids2000.com/>
- Avert
<http://www.avert.org/>
- Centres régionaux d'information et de prévention du sida
<http://www.crips.asso.fr/>
- Hong Kong AIDS Foundation
http://www.aids.org.hk/know_/index.html
- International AIDS Society
<http://www.ias.se>
- International Association of Physicians in AIDS Care
<http://www.iapac.org>
- International Council of AIDS Service Organizations (ICASO)
<http://www.web.net/~icaso/icaso.html>
- International Symposium on HIV Prevention
<http://www.hivnet.ch/aids98/prevention/international.html>
- Sidaweb
<http://www.sidaweb.com/>
- Terence Higgins Trust
<http://www.tht.org.uk/>
- UNAIDS
<http://www.unaids.org/>

HIV PREVENTION TOPICS

Harm Reduction

- Harm Reduction Coalition
<http://www.harmreduction.org>
- International Harm Reduction Association
<http://www.ihra.net/networks.htm>
- Methadone Information Exchange
<http://www.mindspring.com/~methinfex/>
- National Alliance of Methadone Advocates
<http://www.methadone.org/>
- Observatoire français des drogues et des toxicomanes
<http://www.dgldt.fr>
- Push Harm Reduction
<http://www.cts.com/crash/habtsmrt/hrmtitle.html>

Needle Exchange

- Lindesmith Center
<http://www.lindesmith.org/library/lib.html>
- North American Syringe Exchange Network
<http://www.nasen.org/>
- Safeworks Needle Exchange
<http://www.safeworks.org>
- San Diego Clean Needle Exchange
<http://www.wilder.net/svs/needle.htm>

Safer Sex

- AIDS Virtual Library
<http://planetq.com/aidsvl/index.html>
- AEGIS AIDS Education Global Information Network
<http://www.aegis.com/>
- The Body: Safe Sex and Prevention
<http://www.thebody.com/safesex/sex.html>
- Coalition for Positive Sexuality
<http://www.postive.org/>
- Just Say Yes
<http://www.positive.org/JustSayYes/>
- The Safer Sex Page
<http://www.safensex.org/>
- STOP AIDS Project
http://www.stopaids.org/AIDS_pre.html

Youth

- TeenAIDS - PeerCorps
<http://www.teenaid-peercorps.com/>
- Youthco
<http://www.youthco.org/>
- Youth-Online
<http://www.soonet.ca/starla/aids/>

Other

- AIDS Economics
<http://rocks.worldbank.org/aids-econ/>
- National Native American AIDS Prevention Center
<http://www.nnaapc.org/>
- Rural Center for AIDS/STD Prevention
<http://www.indiana.edu/~aids/>

SAMPLE USER REGISTRATION FORM:

Peterborough AIDS Resource Network Resource Centre Membership	
Name: _____	
Last name	First name
Phone: [H] _____ [B] _____	
Can leave a message [] yes [] no	
Address: _____	
Written material may be borrowed for 2 weeks. Video and audio cassettes may be borrowed for 1 week. I agree to return all items borrowed or pay the replacement value.	
_____ Signature of applicant	_____ Date

For resource centre use only	
Borrower #: _____ Completed by: _____	

To ensure users' anonymity, Peterborough AIDS Resource Network Resource Centre only writes down users' numbers on the check-out list.

INTERLIBRARY LOAN FORM

FOR BORROWING AGENCY:

Date: _____

Requested by: _____

Address: _____

Tel: _____ Fax: _____ E-mail: _____

BOOK

Author: _____

Title: _____

Place of publication: _____

Publisher: _____

Date of publication: _____

JOURNAL/MAGAZINE

Author: _____

Title of the article: _____

Title of the journal: _____

Year: _____ Volume: _____ Issue: _____ Page: _____

Received on (date): _____

FOR LENDING AGENCY:

Provided by: _____

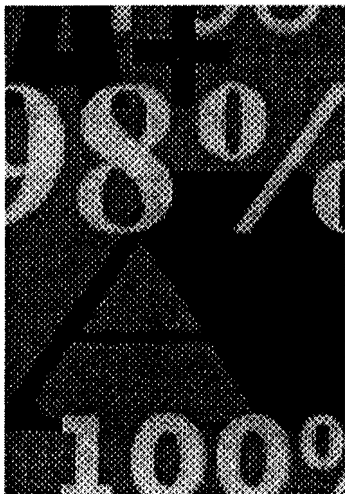
Return address: _____

Tel: _____ Fax: _____ E-mail: _____

Due date: _____ Received on (date): _____



CHAPTER 4. RECORD KEEPING/STATISTICS



You will need to keep records for your own information as well as for reports you are required to submit to any governing body.

The information required may include the following items:

- number of documents/books/videos, etc. added to the collection
- number of items withdrawn
- total of each format at the end of current year
- number of new borrowers registered
- number of materials circulated
- number of questions received and/or answered
- number of items borrowed from/loaned to other centres
- number of requests referred by/to other centres.

Every centre must account for money received and spent. It is very important to keep track of all receipts and expenditures so you can be accountable to your users and to the funder.

☛ *See sample usage forms and statistic sheet at the end of this chapter.*

Statistics

10 good reasons why we should keep them

1. To be aware of resource centre activities
2. To be able to make comparisons between services
3. To develop the collection according to needs and demands
4. To make the right requests for budget allocations
5. To know who the users are
6. To substantiate staff needs
7. To quantify productivity
8. To analyze a problem before decision making
9. To be able to forecast future needs and development
10. To get a sense of holdings.

PARC Library – Monthly Usage Summary

Month: _____ **Year:** _____

Category Week1 Week2 Week3 Week4 Week5 Total

Individual						
Professional						
Student						
Staff						
Volunteer						
Female						
Male						
Phone In						
Walk In						
Fax In						
Mail In						
E-mail						
Books						
Videos						
Audio						
Photocopies						
Self-Serve						

Total Number of Library Patrons for Month _____

CANADIAN HIV/AIDS CLEARINGHOUSE

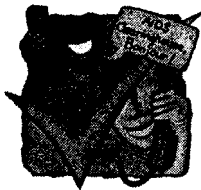
Reference Questions – Monthly Statistics

Month: _____ Year: _____

Ready Reference Questions:

Region	Asos	Univ.	Health Prof.	Fed. Gov.	Prov. Gov.	Public Sector	Intl.	Private	Schools Elem/High	CPHA	Assoc.	Others	Total
ON													
QC													
MB													
SK													
AL													
BC													
NF													
NS													
NB													
PEI													
NWT													
Yukon													
Nunavut													
Outside Canada													

Initials : _____



REFERENCE REQUEST

DATE IN: ___/___/___ DATE OUT: ___/___/___ DATE DUE: ___/___/___ INITIALS: ___
MM DD YY MM DD YY MM DD YY

LANGUAGE/LANGUE: English/Anglais French/Français TITLE/TITRE: Miss/Mlle Ms Mrs./Mme Mr./M. Dr.

NAME/NOM

AGENCY/ORGANISME

ADDRESS/ADRESSE

CITY/VILLE

PROVINCE

POSTAL CODE POSTAL

COUNTRY/PAYS

()

()

TELEPHONE/TÉLÉPHONE

FAX/TÉLÉCOPIEUR

E-MAIL/COURRIER ÉLECTRONIQUE

REQUEST/DEMANDE

Arev/InMagic

Internet

CD-ROMs

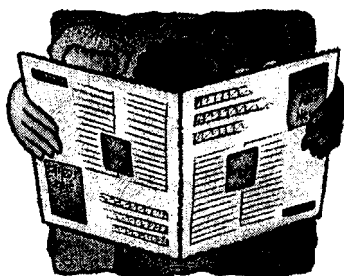
Referral

DIALOG

ACTION



CHAPTER 5. PROMOTION



You have now organized your collection and provided services to your users. You have to promote your resource centre to your users and to your funding agencies. Promotion is not extra work you do when you have free time, but an essential part of your job to keep your centre alive. Think of promotion as the process of transferring your enthusiasm for your services to your clients and prospective new users.

PARC LIBRARY
A community-based, publicly accessible library specializing in HIV/AIDS.

1107 Seymour St.
 Vancouver, BC V6B 5G8

Tel. 681-2122
 ext. 294 or ext. 248

Successful promotion starts with a **marketing plan**. While “marketing” is an idea borrowed from the world of commerce, it has become an increasingly important concept in the non-profit sector.

One of the best ways to protect your stake in public sector funding is to make sure that your service is strongly supported by your local community. A good marketing strategy will ensure that your community knows about the HIV/AIDS Resource Centre and knows what it has to offer.

Developing a Marketing Plan

Developing a marketing plan is something like planning a trip, you need to know where you are starting from and where you want to go. You also need to think about the best strategy to reach your destination. What route should you take? What supplies will you need? and how much will you have to spend?

A successful marketing plan includes five components:

1. Objectives

What do you want to have happen? What is your target date for achieving your goal? Establish your objectives with an eye to being able to measure your success.

TIP

First find out if your organization has already implemented a promotion plan — Ask around! Gather all existing promotional materials.

**EXAMPLES:**

- To increase the resource centre client base by 20%.
Target date: Six months from today!
- To develop a personal network of 30 contacts in the health care and social service community.
Target date: December 1st

2. Target market

Think about who might use your resource centre, and whether or not they are current users. If your organization has a Mission Statement, refer to it for guidance. HIV resource centre users could include:

- people living with HIV/AIDS
- family members
- health professionals
- care givers
- social workers
- AIDS educators
- teachers and students
- other members of the public for research or social planning purposes.

TIP

To find out more about your target groups — ask questions! Your current users can be a vital source of knowledge about how to reach other potential clients. What strategies can they suggest for letting others know about your services?

Think about whether any of these groups might be under-represented as users and what your resource centre can offer them. Be aware that there is no such thing as the “general” public. The groups in your community that you want to reach will all have a unique set of interests. You may need to use different strategies to reach different groups. You may also need to do some market research to find out more about your target groups.

3. *Strategies and tactics*

Think about the services you have to offer and how they might be promoted. Some marketing experts suggest that promotional efforts should focus on one group at a time.

Questions to think about:

- What special services can you offer to any of the groups in your market?
- What message will you try to get across?
- What are some of the obstacles you might face in attempting to communicate with some groups?
- Who can help?



EXAMPLES:

- Offer to set-up a noon-hour information session at a local high school.
 - Plan to have a table with information about the resource centre and a selection of interesting material. Invite a local health-care professional to give a brief talk about prevention at the session.
 - Is there an HIV/AIDS support group in your organization? If yes, offer to hold an information session for them. If not, work with your colleagues to help start one.
 - Does the local hospital have a staff newsletter? If yes, offer to write a short article about how your resource centre can help health-care professionals. Find out about other local publications where you might promote resource centre services — such as a local nurses association newsletter or alternative health publication. The local public library can help you track down possibilities.
-

4. *Communication Tools*

Once you have a clear idea of how you want to reach various target groups, consider the range of communication tools that you might use to reach those groups. Decide what types

of promotional materials you might need and how these might be developed; what costs would be involved and what opportunities there are for free or inexpensive advertising. Most of the time you will have a number of options for communicating to your target groups. Which media seem most promising as a way to capture the attention of the people you want to reach?

Communication Tools:

- verbal presentations (in person and by phone)
- slide presentation
- brochures
- one-page fact sheets
- letters
- e-mail
- signs
- newspapers
- radio and television (especially local cable stations)
- web sites.

If you are not confident about your own ability to develop attractive promotional material, seek out others who might be willing to help. Could some student volunteers from the local high school art department help design a bookmark or brochure?

5. Evaluation

Evaluating your success is an important aspect of a marketing plan. With an evaluation, you can determine whether or not you have met your objectives. Even if you have fallen short of your goal, what has been achieved? You should also evaluate the success of each initiative you have undertaken. If you sponsored a talk by a local health-care professional, how many people attended? How did they find out about the event? Did they find the talk informative? In planning promotional activities or an advertising campaign, determine in advance how you will measure your success. Use information you have gathered in your evaluations to help you formulate new goals and strategies.



TIP *A logo or simple graphic can provide instant recognition and make printed materials more memorable.*



TIP *An excellent book for people without much experience in graphic arts is the Non-designers Design Book by Robin Williams. It is published in paperback by Peachpit Press. (ISBN: 1566091594)*

Your image in print

Marketing a positive image for your resource centre is a crucial part of attracting and keeping clients. Image includes the range of things that contribute to public perceptions about an agency. Logos, business cards, signs and brochures are important aspects of your resource centre's image. Think of every written communication as an opportunity to promote your services. Remember the maxim "it's not what you say but how you say it". What do you want your print materials to say about your resource centre?

Here are some guidelines for developing and using print material to promote a positive image:

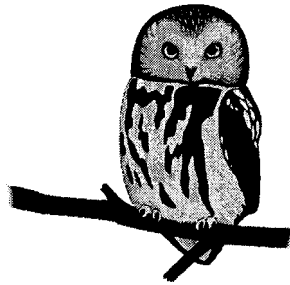
Logos

A logo can make your communications distinctive and memorable. Logos have an impact on visual memory. Sometimes people may not remember the exact contents of a communication you sent, but a logo helps them remember that they did receive something from you. When a follow-up communication appears, it is more likely to catch their attention. A logo can also help you look well-established and it can contribute to gaining "instant recognition" in an unfamiliar situation. You can add your logo to business stationery, brochures and business cards. If your organization already has a logo, make sure to use it.

Some software programs include logo samples. A local high school or college may be willing to have art students design a logo for you as a class project. The Internet offers a multitude of free graphic images that could be modified and adapted for use as a logo. You can find clip-art collections at The Whole Internet Guide To Clip Art site at www.Best-of-Web.com/computer/clipart_index.shtml and at Clip Art Searcher at <http://webplaces.com/search/>.

Make sure that the logo you select is upbeat and attractive. Ask others for their reaction to logos you are considering. Be sure that your logo is easy to reproduce. (You can ask your local printer for advice.)

If you feel you lack resources for developing a logo, you can still give your print materials a distinctive look by selecting a funky graphic and combining it with a catchy slogan. You can also simply select an interesting font to use for printing the name of your resource centre on business cards and letterhead. You will find many sources for free and inexpensive fonts listed at Yahoo at www.yahoo.com or you can purchase inexpensive font collections from your local software dealer.



Be Wise about HIV and AIDS

Business cards

When you give someone a business card, you are also sending out a marketing message! Look at a number of business cards that you have received. Which cards do you find most appealing? What makes you stop and take notice of someone's business card?

Your card can be a mini-brochure. Remember you can print on both sides of the card. What do you want people to know when they pick up your card? Include a catchy slogan or some bullet points about what services are available in your resource centre. Make sure to use a style that is in accordance with the culture of your organization.

Signs

You can use signs to draw attention to services and to promote special events. Hand-lettered signs can look impermanent and unprofessional. Use word processing features such as large font sizes and framing to create neat looking signs. If you have a good eye for design, you can experiment with using different font styles, but make sure that your signs are clear and easy to read. A print shop or photofinishing shop may be able to enlarge your signs and mount them on posterboard for a minimal cost.

TIP



Consider mounting copies of your business card onto magnetic backing and sending these to local clinics and social service agencies.

TIP

Print Shop is an affordable software package from Broderbund for assembling stationery, flyers, newsletters, and other print projects. The software includes a library of templates for newsletters and brochures. If your budget allows, purchase the professional version which includes thousands of graphics and a Web site development tool.

TIP

Make a list of points that you want to include in your brochure. Review your list to determine which points are most important and which could be left out if necessary. Which items are main ideas and which are sub-headings or supporting points?

Promotional signs are especially effective in colour. If you would like to produce your signs or other printed documents in colour and don't have a colour printer, save a copy of the document on a floppy disk and ask your local print shop to print these for you. Many such shops offer a range of services that can help you develop customized print materials.

Brochures

Brochures can also be an excellent way to tell people more about your services. Brochures are relatively inexpensive to produce, easy to mail and more inviting to read than a business letter.

Think carefully about your audience. Rather than listing services and resources (e.g. "Books, pamphlets, etc."), emphasize what people will gain by using your resource centre (e.g. "You'll find answers to your questions about HIV and AIDS."). Use a larger font size to highlight main ideas. Use slightly smaller sub-headings to label other key points. Plan your headings and sub-heads to capture attention and add clarity.

The standard and most common brochure is the six-panel design. Fold a standard sheet of paper three times, and use this to sketch out your design. Here is a simple way to structure your brochure so that it works well:

- Use the **front panel** to announce the name of your resource centre along with a very brief idea of what you are all about. The front panel of your brochure should be dynamic and full of excitement. (A catchy slogan works well!)
- On the **inside panels** you can explain in more detail the services and resources that are available in your resource centre. The inside leaf is the first thing people see when opening the brochure and is a prime spot for detailed information.
- Use the **back panel** for contact information: phone numbers, address, and hours of operation.

Your local print shop can print and fold brochures cheaply. Have your brochure printed on coloured stock. You can also purchase attractive designer papers that have already been scored for folding. These are slightly more expensive than plain stock, but they will give your brochures a richer look and clean, crisp edges.

TIP

A regular publishing schedule is a good idea, but start small — quarterly, or even three times each year. Publishing regularly will keep you motivated and keep others involved. It also helps build readership.

TIP

A newsletter should not be a hodgepodge of things that strike your fancy. Try to organize each issue into regularly occurring sections, such as a "Facts about AIDS" column, an interview piece or a column which lists interesting new books.



AIDS Calgary's resource centre puts an ad on the local public library's due-date slip for a reasonable price.

Newsletters

Newsletters generate interest in your services and keep in touch with clients. They can also be a useful way to build a mailing list of community contacts. Although newsletters can be a great way to publicize your resource centre, they are often time consuming and costly to design, write, print and mail. If you are thinking of developing a newsletter, consider who might help with this venture. Who do you know who might be willing to contribute copy? Is there a local business that might be willing to cover mailing costs for an issue, or might other service agencies serve as distribution points for the newsletter? Before launching a one, spend a lot of time planning.

Here are some things to think about:

- What is the purpose of your newsletter?
- What will make it special? (A newsletter must provide useful information to the recipient.)
- How often will you publish?
- What size will it be?
- What layout will you use? (Two or three column? Self-mailing format where you keep one panel clear for a mailing label?)
- What will you call your newsletter?
- What kinds of stories will you include?
- How will you develop a mailing list for your newsletter?
- What will the newsletter cost to print and mail?
- Will you distribute the newsletter electronically? (This is a good way to reduce costs, but you will miss opportunities for broader distribution through libraries, local clinics, schools or drop-in centres.)

Once you have decided to publish a newsletter, design an attractive masthead (or have someone design it for you). The best way to plan a layout is with a blank sheet of paper and a ruler. You can use your word processor to create columns, sidebars, small areas of boxed text, borders and framed areas for graphics. You can also include "boilerplate" text for headings and contact information that you want to appear in each issue. Once you have developed a format that you like, save it as a template for easy production.

LIST

Here are some suggestions on how to promote your resource centre:

- become a CANNET member
- produce a bookmark of your centre
- produce a post-card/go-card of your centre
- produce a resource centre newsletter
- send an article featuring your resource centre to your local community newspaper or other magazines
- set up a Web site
- list your resource centre in the Yellow Pages
- submit a notice about your service to the local cable TV station
- hold an information session at a local high school or library
- set-up a display at community events.

TIP

Statistics indicate that on a typical day, people refer to the yellow pages 49,000,000 times. Costs for a yellow page listing can be as little as \$1 per month in smaller centres, but costs do vary from city to city. Phone the Yellow Pages sales offices (1-800-461-7243) to find out about costs in your area.

(Almost) Free Publicity

By gaining media attention through stories, news releases, interviews and even letters to the editor, you can increase your visibility without having to spend a lot of money. The key to implementing your media strategy is getting your information to the right people. Use the yellow pages or your public library to find information on the media outlets in your area, such as daily and weekly newspapers, local magazines, television and radio stations. Call each agency to find out who covers health issues and community services. Ask about deadlines and preferences for receiving information (e.g. hardcopy, fax or e-mail.) Once you have established a contact with a local media person, you can send them a press kit.


Spend some time studying the kinds of stories that make the news. Remember that many different people and events vie for media attention. Sometimes, things that we consider newsworthy and exciting would make a reporter yawn. Try to find an interesting angle for your story, such as tying it to a current news issue or event. Stories about people and events are more likely to capture interest than a dry description of a service.


When you have news or an event to promote, send out a news release to local media. News releases should be brief and typed double-spaced. Include the key points you want to publicize: who, what, where, when, why and how. Try to think of an interesting headline that will grab the attention of a busy editor. Also, be sure to include a contact name and phone number. It's good practice to follow up your news release with a phone call within a week. This will remind an editor or program producer about your submission and provide an opportunity for personal contact. Being enthusiastic about your topic will help to create interest.

Electronic Marketing

Both electronic messaging and the World Wide Web provide good opportunities for promoting your services online. While both of these are technologies worth exploring, they also have some limitations. Many times it's best to distribute information both electronically and on paper.

TIP  Some newspapers are willing to publish small ads for non-profit agencies for free. These are used to fill-in empty space on a page of print. See if you can spot ads of this type in your local newspaper. Contact the newspaper for details. Most cable television stations also run public service announcements free of charge.

TIP  Visit this collection of articles, tutorials and other resources for developing a Web site and communicating online:
Benton's Best Practices for Non-Profits
<http://www.benton.org/Practice/Toolkit/>

TIP  Send e-mail attachments in Rich Text Format (.RTF). You will find Rich Text Format included with your word processor Save options. When you use .RTF you preserve such things as bolding and italics without having to worry about what word processing software will be used to read the document.

Electronic Mail

Advantages of using electronic mail:

- E-mail is a convenient way to offer a personal level of service to your clients.
- Easy re-distribution. If you send out a newsletter using electronic mail, it's easy for the recipient to forward it to others who may be interested.
- Cost savings — your costs for distributing material online are basically the cost of connectivity.
- Quick to develop — unlike traditional letters, e-mail messages can be brief and chatty.
- Quick transmission

A few cons:

- Your messages might not be read if the recipient gets a lot of e-mail.
- Not everyone can be reached through electronic mail.
- Plain text messages lack visual appeal. (This is a problem if you are thinking of distributing a newsletter or brochure electronically.)



EXAMPLES

Customer contact:

➔ "I found the book that you wanted on Amazon.com. Let me know if you're still interested and I will place an order!"

Announcements:

➔ "We're hosting a coffee hour next Thursday at 7:00 p.m. in the resource centre. A caregiver from a local AIDS hospice will be a special guest. Let me know if you can make it, and please feel free to pass this info on to others you think might want to attend!"

Networking:

➔ "The latest issue of our newsletter is just back from the printer. I am sending you 20 copies to distribute at your clinic. Let me know if you need more. PS. Let's do lunch next month."

Surveys:

- ➔ "Our resource centre is seeking ways we can better serve our user community. Please take a few minutes to fill out the attached survey. Your feedback is important to us."

World Wide Web**TIP**

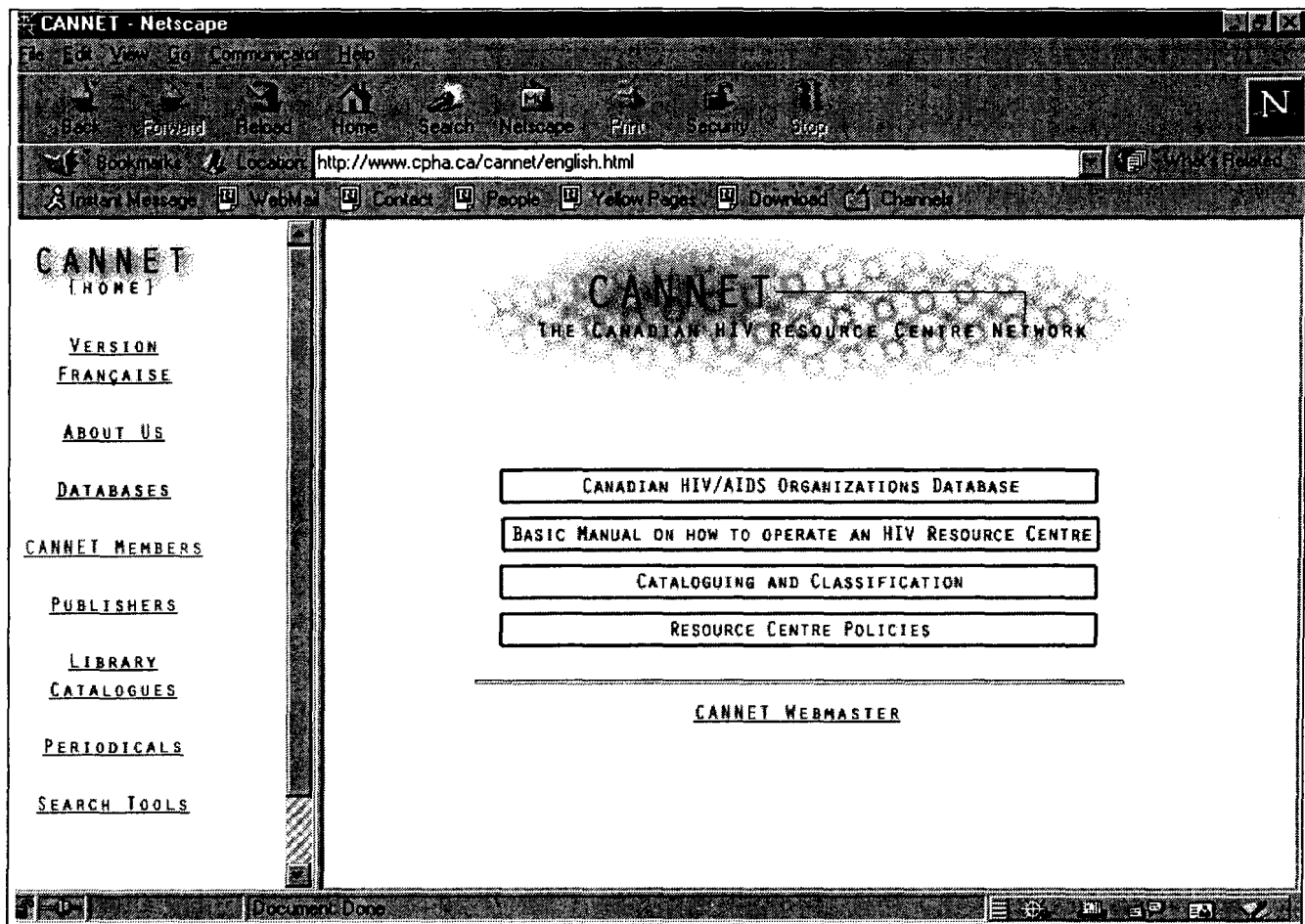
Plan for one or two pages of your Web site to double as a factsheet or back-grounder about your services. It's easy to keep the information up-to-date, and you can distribute printed copies at community meetings and other events.

You are probably already using the Web as an information resource, but have you thought about how you can also use this tool to tell people about your resource centre? To set up a Web site you will need to develop a set of pages using something called Hypertext Markup Language (HTML). You will also need to post the pages on a computer that is hooked into the Web. Many Internet access providers offer space on their computers for posting Web pages, usually for a small additional cost.

Although developing Web pages requires a bit more technical know-how than using a word processor, once you have learned the basics, Web pages are simple to do. There are many good instruction manuals on the Web to help you get started. If you don't want to tackle this job yourself, you may be able to find a local high school student willing to develop a Web site for you. Some high school computer teachers have their students develop Web pages for non-profit groups as a class project.

Advantages of having a Web site:

- Makes information broadly accessible.
- Inexpensive distribution of print material.
- Information is easy to update.
- You can include links to other HIV/AIDS agencies and resources.
- You can collect information from visitors (such as e-mail addresses).
- May include sophisticated features, such as an online catalogue.



A few cons:

- Web sites need to be current — one more thing to look after.
- Different browsers display Web pages in different ways. This can make development tricky.
- Because the Web is so vast, it's often hard to get noticed.

TIP

Make a "hot list" of potential contacts. Develop strategies for connecting with them. Health care professionals and social service workers can be particularly good contacts. Most will value knowing about your service. They are also likely to be knowledgeable about other potential clients.

Networking

The cheapest (and still the best) way to promote your service is through personal networking. Networking is also very rewarding. Often you will find that you will share more than one interest with the people you meet. You will also find that networking is a two-way street. You will probably find yourself helping others as much as they help you (and forming some rewarding friendships in the process!) Networking starts with being friendly and approachable, taking time to get to know people and being a good listener.

Here are some additional tips for effective networking:

- Set specific networking goals. Identify the people you want to meet and plan ways to get to know them.
- Focus on others' needs and be aware of ways that you can help them.
- If you are not comfortable talking to people you don't know well, practice small talk. Think of some conversation starters.
- Follow up new contacts with a phone call.
- Provide great customer service.
- Take time to talk to your regular clients.
- Make at least two new personal contacts each week.
- Become active in community groups and projects.
- Join professional associations.
- Attend lectures and community events.
- Keep in touch. Review your list of contacts regularly. Phone people you haven't spoken to in a while. Always approach them with something you think might be of interest to them.
- Make sure your current friends and acquaintances know about your work.
- Send personal notes — thank you notes are especially important (e.g. "Thanks for your help" or "Thanks for taking time to meet with me.")

Marketing Plan Worksheet

Marketing Objective:

Completion Date:

Target Group: (Include a description of the group you are trying to reach.)

Strategies: (List pros and cons.)

Communications: (List messages you want to get across, what media you will use and key contacts.)

Evaluation: (How will you determine whether or not you have been successful?)



CHAPTER 6. USING AND CREATING A DATABASE

Database programs can help you manage your resources and improve services. They will allow you to manage large amounts of texts, numbers, dates and electronic images. You will be able to browse and quickly find the information you need to provide quality services to your resource centre users. Database programs can also be a key technology for developing a virtual library service. Learning to use a database application involves two steps:

- First you need to learn a few basic concepts about how a database stores and retrieves information.
- Then you need to learn how to use the features of a database program.

If the idea of setting up a database application is a bit daunting at first, don't despair. Although database software programs can be very powerful, most such programs include built-in templates, sample databases, 'wizards' and 'experts' that will do a lot of the hard work for you.

What is a database?

A database is a group of records or a file of information, either automated or manual. A phone book, a card catalogue, a mailing list or a list of journals are all examples of manual databases. If you have used an online reference service to obtain information, such as Medline or The European Database on AIDS, you will already know something about how an electronic database works. Your local public library may have an online catalogue (or OPAC), another example of an electronic database. An electronic database lets you search for and select records and then print or view a list of what you've found.

Why use a database?

With a database program, you can put information in once and retrieve it in many different ways. You can use a word processor to develop different kinds of lists:

- lists of journals
- vertical file material

- a client mailing list
- lists of materials that have been checked out
- lists of materials that are on order
- lists of new material.

By using a database to create these lists, you will be able to sort and access this information in many different ways.

LIST

Database programs let you:

- *Browse through a file of data*
- *Sort data in various ways*
- *Find specific records by typing in keywords or characters*
- *Create multiple layouts for viewing and printing*



EXAMPLE:

A list of new acquisitions might contain the following information:

Title
 Author
 Call Number
 Subject Keywords
 Date the item was acquired.

By using a database program to produce a list of new acquisitions, you will be able to manipulate this information to produce the following reports:

- An alphabetical title list
- An alphabetical subject list
- A list of new titles in selected subject areas that can be sent to clients as part of a current awareness service
- A list of items acquired as of a particular date
- A merged list of several “new acquisitions lists” that can be used as a quarterly or annual update of new holdings
- An automatic “count” of new materials in a given subject area
- A list by call number and by date range that will let you easily browse the shelves to find out how well materials acquired during a particular time frame are being used.

For each of these reports, the basic information about an item was entered only once. Common database features for filtering, sorting, and merging data do the rest. It is easy to see why databases have been called “information crunchers”. With a sophisticated database package, you may even be able to publish your new acquisitions list on the World Wide Web!

Some important terms

In learning to set up and use a database, it's important to be familiar with a few frequently used terms. Understanding these terms will also help you to learn more about how databases work.

Field. A field contains information about only one aspect of each item in the database. Title, author, call number, physical description, are examples of fields that are typically included in a book catalogue record.

Record. A record contains all of the fields of information about a single item in the database. For example, a book catalogue would have a record for each title in the library and a client database would have a separate record for each client.

TIP



In an electronic database you can have many different fields for each item in addition to the fields that traditionally appear on a catalogue card. For example, a record could include a notes field where you can insert informal comments, such as "needs repair" or "Chapter 2 provides some statistics on HIV."

Title	The Guide to Living with HIV Infection
Author	Bartlett, John G.
Subject	HIV Infections -- psychology.
Call Number	RC607.A26B376 1991
Notes	Includes index
Barcode	108624
Copy	2
ISBN	0801841933

FIG. 1. Illustration of a typical record with fields indicated.

Files (Tables). A file or table is a single store of related information. Sometimes a file is the complete database, but a database may also consist of several different files that are inter-related in some fashion. A relational database is a database consisting of more than one file.

**EXAMPLE:**

A circulation database could consist of several different files:

- a file which lists items available in your collection
 - a separate borrower file with patron names and addresses
 - a file designating the loan period for different types of borrowers
 - a file designating fines for overdue material.
-

Each of these files will be linked to one or more of the others. A relational database will let you tie information together to produce reports, such as a report which lists materials that are overdue.

Primary Key. A primary key is a unique identifier for each record in a database. Sometimes a database program assigns a unique number to each record, and this becomes the primary key. Most of the time, the primary key is a way for the database software to keep track of individual records, but it can also be a handy way to quickly find a specific record in the database.

Index. An index is a database function that lets you quickly look up the contents of any record in a file. It is much like the index of a book. Typically an index is created for the most important fields in a record. A database can also include fields that are not indexed. A physical description of a book is an example of a data field that might not be indexed, since you would seldom use it to search for records.

Query. A query is a way of selecting records from the database. You might query a circulation database to find out which items are overdue.

Report. A report is a format for printing or viewing database information. A client database would likely have complete address and other information about your users, but you might want to print a report containing only names and e-mail addresses. A database report lets you print or display information in many different ways.

New Acquisitions List		
Subject	Title	Call Number
AIDS -- Prevention	Guidelines for HIV Interventions in Emergency Settings	RC271.C5W54
AIDS -- Social Issues	AIDS and the military	RA644.A25A15
AIDS -- Social Issues	29 Cases that set the course on AIDS/HIV	KF3803.A54V47
AIDS -- Statistics	Epidemiological Fact Sheets by County	HV8843.H368
Family psychotherapy	101 more interventions in family therapy	RC488.5A17
Human Rights	HIV/AIDS and Human Rights International	KJC5138.A3K45
Human Rights	1999 U.S. international response to HIV/AIDS	Vertical File
Sexual Behaviour	Impact of HIV and sexual health education	LB1570.K731

FIG. 2. Illustration of a sample database report.



TIP *Setting up a table in Microsoft Word is a simple way to collect data which can then be sorted in different ways.*

Use the Table/Sort menu option to sort records in a table. You can also use the mail merge function to create a list of selected fields for all or just some of your records.

Setting up a database using word processing software

If you do not have a database program, you can use your word processor to set up a bare-bones database application. Be aware that you will not be typing information into a free-form text document as you would normally type a letter. Instead you will be using the table and mail merge features to create individual records and produce a report.

The simplest way to understand how to set up a database using Microsoft Word is to walk through the mail-merge process. In this example, we will set up a client list. Follow these steps:

Step 1. Setting up a data source

- a) Decide what fields you want to include for each record. Create a separate field for each piece of data you might want to sort by. If you already have a manual file with information on each client, you can use it to help you decide what fields to include.

**EXAMPLE:**

Fields you might want to include in a database of resource centre clients:

Last Name
 First Name
 Street Address
 City
 Postal Code
 Telephone Number (Work)
 Telephone Number (Home)
 Fax Number
 E-mail
 Client Status (General Public, care giver, professional)
 Membership status (active, inactive)
 Borrower number
 Notes (a field for comments)

**TIP**

In a word processor table, you can easily change the width of a column by placing your cursor on the divider line

for the column, holding down the mouse button and dragging the line for the column to where you would like it to be.

- b) Choose Insert Table from the Table menu
- c) Use the selection box to specify the number of columns and rows you want for your table.
- d) Add the field names you have selected across the top row of your table.
- e) Save the table.

Step 2. Setting up a main document

The main document sets up the format for your reports. You can think of it as a kind of template. In Word, the main document can be a form letter, mailing labels, envelopes or a catalogue. The catalogue format can be used to create a list of records.

- a) Start by opening a plain document in Microsoft Word.
- b) Select *Tools* and *Mail Merge*. Then click on *Create*.
- c) To create a list of records, select *Catalogue* as the type of document. Finish by clicking on *Active Window*. This lets Word know that you want to add Field information to the document you have just opened.
- d) Now you need to tell Word which file you will be adding data from. Do this by clicking on the *Get Data* button.

- e) Since you have already created a table with the data you will be using, click on *Open Data Source* and access the file in which you have saved your table information.
- f) Click on the Edit Main Document button.
- g) Notice that your document now has an *Insert Merge Field* button near the top-left of the screen. If you click on this selection, you will see a list of the fields contained in the table you created as your data source. Click on each of the fields you want to appear in your document. The fields are automatically inserted at the cursor position.

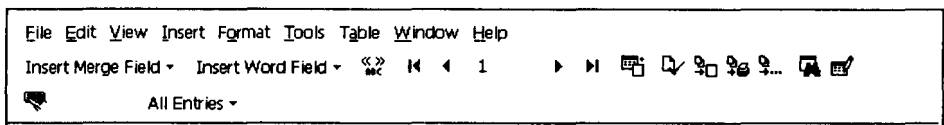


FIG. 3. Mail Merge Toolbar.

TIP



You can use cut and paste to move field information around to suit whatever layout you would like. Be sure to include one or two blank spaces to separate each record as well as any punctuation that you want to appear in the final document.

- h) At this point you can add field information as well as other information that you might want to include on the printed report. Since this example is a client list, you could add "Resource Centre Client List" at the top of your document. You can also add any information you want to display along with client record information, such as a label for each field.

Step 3. Merging data into your main document

The last step is to add the data in your table to your main document. You will have the option of adding all of your records, or just those that meet a certain criterion.

- a) Select *Tools* and *Mail Merge*. Then click *Merge*.
- b) *Query Options* lets you select only some records for inclusion. Click on *Query Options* to see how this screen works.



EXAMPLE:

Query Options:

- ➔ If you included a Status field in your table, you could select only *active* members' names to your printed list, while still keeping records for *inactive* clients in the database.

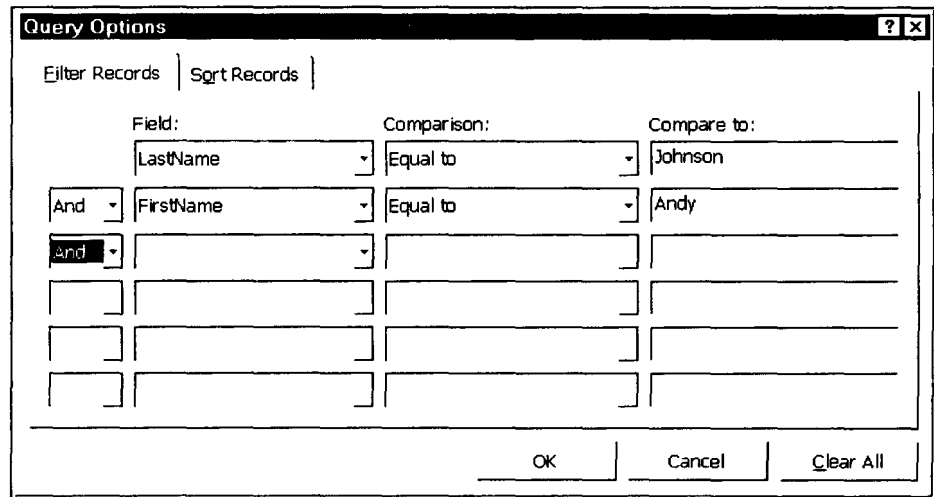


FIG. 4. Query options screen capture

- c) Clicking on the *Merge* button from within the *Merge Window* creates a new document of individual records from your database displayed in the format you have set up.

Adding Numbers

Once you have mastered the basics of using *Mail Merge* to produce lists of your records, you can use the *Insert Field* option to add numbers to your records:

- Place your cursor where you want the number to appear (usually at the start of the record).
- Select *Insert/Field* from the menu options at the top of the screen.
- Ensure that (All) is highlighted in the lefthand window of the selection box and scroll to find *AutoNum* in the righthand window.
- Click on OK.
- Add a period and a space (or other punctuation you want to appear).

TIP

Visit the web site for products you are interested in. Sometimes you can download trial versions of the software. Popular database programs can also be ordered or purchased from a computer store. Your local computer software vendor may be able to recommend other database software products.

Setting up a database using database software

Several database software programs are available at an affordable cost. Three of the most popular database programs for resource centres are:

FileMaker Pro (\$275 *)

FileMaker, Inc.
5201 Patrick Henry Drive, MS: C-11
Santa Clara, CA 95054
1-800-325-2747 (U.S. and Canada) between 8am-1pm
www.filemaker.com/

Microsoft Access (\$300 *)

Microsoft Canada, Inc.
320 Matheson Blvd. West
Mississauga, ON L5R 3R1 CANADA
Phone Main Office: 1-905-568-0434
Sales & Info: 1-800-563-9048
Microsoft Order Centre: 1-800-933-4750
<http://www.microsoft.com/office/Access/default.htm>

InMagic (\$1575 *)

Inmagic, Inc.
800 W. Cummings Park
Woburn, MA 01801-6357
1-781-938-4442
1-800-229-8398
<http://www.inmagic.com/>

* estimated cost

Using FileMaker Pro

FileMaker Pro is a database program that is powerful and easy to learn. You can download a trial version of FileMaker Pro from <http://www.filemaker.com>. In this section we will provide some basic instructions for using FileMaker Pro. If you follow these instructions and study the examples, you will get an idea of the kinds of things you can do with a database program in your resource centre.

TIP

FileMaker Pro includes over 50 ready-to-use samples for home and small business applications.

A number of these templates could be used in a resource centre, such as an event schedule, expense report, purchase order and a message database.

Modes

FileMaker Pro has four main modes. Each mode will allow you to accomplish different things.

- **Browse Mode**

The Browse mode is used for entering data, navigating between records, sorting, and creating new records.

- **Find Mode**

The Find mode lets you search for records.

- **Layout Mode**

The Layout mode lets you set-up screen views or database reports.

- **Preview Mode**

Preview mode lets you view your records, as they are formatted and ready to be printed.

You can use the Mode menu to switch from one mode to the next, or the mode selector near the bottom left of the screen. Note that the menu choices and screen icons change as you change from one mode to another. The Flipbook icon at the top left of the screen will let you scroll from one record to the next in Find mode. In Layout mode it will scroll from one layout to the next.

Setting up a database

To create a new database in FileMaker Pro, follow these steps: (using the trial version that you have downloaded)

Step 1. Define the database

- a) Call up FileMaker Pro on your computer and click on the create a new empty file option.
- b) A dialog box will appear asking what you want to call your database and where you want to save it.

TIP

Consider including a creation and modification date in all records. This will make it much easier to find, print, etc. the newly created/modified records.

TIP

FileMaker Pro makes it easy to delete or add a field. You can also change field names and field types. In Windows, press the key combination CTRL-SHIFT-D to access the Define Fields dialog box. Highlight the field you want to modify and make the change. If you are changing a field name or type, you will need to click SAVE to complete the change.

- c) The next window prompts you to define fields. Here you add a field name and select a field type for each field you want to include. Most fields are text fields. Number fields are used for fields involving some type of numeric calculation. (**Hint:** Phone numbers and call numbers are text fields, since they are not used for calculations.) Global fields display the same information in every record. Enter the information once and you will see it displayed as you activate the data input form for each new record.

**EXAMPLE:**

Here are sample fields for a list of new library materials.

Field Name	Type
Acq Date (Acquisitions Date)	Date
Title	Text
Subject	Text
Call Number	Text
Cost	Number

In this example, the Acquisitions Date field will let you select records for new items on a monthly or quarterly basis. The Cost field will let you track how much you have spent for new materials.

When you have finished adding fields to your database, click Done. FileMaker will now change to browse mode where you will be able to input data.

Step 2. Add data: Browse Mode

You can use the default layout to add, delete and modify your database. If you wish to change the layout before adding data, proceed to Step 3. Here is how to add data:

- Select CTRL N to add each new record to your database
- Use the TAB key to move from one field to the next
- Use CTRL D to duplicate a record
- Use CTRL E to delete a record

(**Hint:** *Edit / Paste Special* lets you add field data from the previous record.)

the asterisk at the end of a word for truncation searches); or search for records within a range of dates, numbers or letters. A range consists of two values, low and high.

- Check the omit button to view all of the records that are not selected by your criteria. (e.g. Checking the Omit box and then searching for “active” users in a patron database would display records for inactive users.) Search for multiple terms in the same field by entering your first search term.
- Use *Mode / New Request* (CTRL N) to access a new blank form. Enter your second search term on the new blank form. DO NOT PRESS FIND UNTIL YOU HAVE FINISHED ENTERING ALL OF THE TERMS THAT YOU WANT TO SEARCH FOR. (**Hint:** Use the Flipbook to scroll through your searches.)

Once you have selected a group of records, you can sort these by selecting the *Mode / Sort* menu option. This will open the *Sort Records* dialogue box. Highlight the field(s) you wish to sort by and click on the *Move* button to move the sort field to the right-hand window. Fields in the right window designate the sort order. Click your selection of *ascending* or *descending* order. Then click *Sort*.

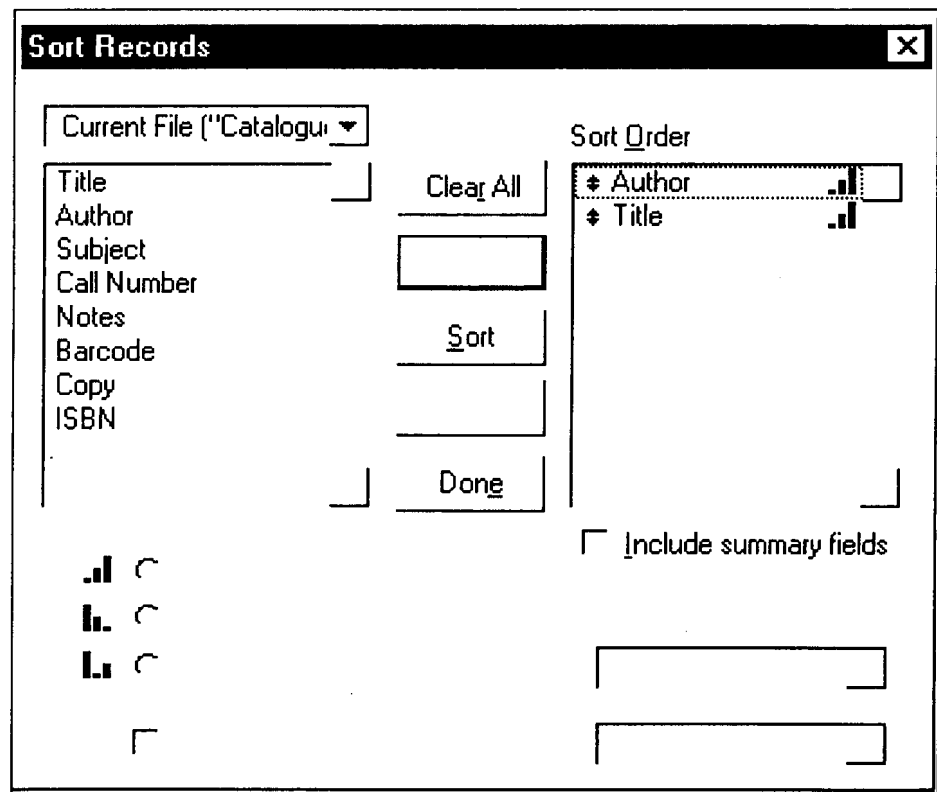


FIG. 7. Screen capture of the Sort Records dialog box.

Learning More

There is much more to know about setting up databases using FileMaker Pro. With FileMaker Pro you can set up complex databases that draw data from other files, and add graphics to your database records. You can automate procedures using “scripts” and add buttons to your layouts for quick “one-click” access to frequently used functions — such as adding new records or printing reports. An advanced feature of FileMaker is its ability to act as a Web page server. This means that you can work with FileMaker databases using a Web browser and FileMaker Pro’s Web Companion plug-in.

FileMaker has a very good built-in help tutorial that you can use to learn more. Carefully study how the sample templates have been set up. You can make “Save As” copies of these and modify them with new field names that suit your environment. Use the Internet to search for other FileMaker templates. Some are free while others are inexpensive shareware. Even if you decide not to purchase a shareware template, you can use them to get ideas on how to set up your own databases.

A book that can help you learn more about FileMaker Pro is:

FileMaker Pro 4 for Windows and Macintosh Visual QuickStart Guide by Nancy Davis and Nolan Hester

Peachpit Press

1249 Eight Street

Berkeley, CA 94710

1-510-524-2178

www.peachpit.com.

ISBN: 0201696649 | 288 Pages

Year Published: 1998

Price: \$24.95

(also available by ordering through a local bookstore or online at www.chaptersglobe.com)



REFERENCES

Books :

Canada. Dept. of the Secretary of State of Canada. Departmental Library. Guide to the organization and operation of reference, prepared by L.Sabourin. Ottawa : Dept. of the Secretary of State of Canada, Departmental Library, 1992.

Katz, Bill (ed.). The how-to-do-it-manual for small libraries. New York : Neal-Schuman Publishers, 1988.

McDaniel, Julie Ann. Training paraprofessionals for reference service : a how-to-do-it manual for librarians, by Julie Ann McDaniel and Judith K. Ohles. New York : Neal-Schuman Publishers, c1993. (How-to-do-it manuals for libraries , no. 30). ISBN : 1555700845.

Meghabghab, Dania Bilal. Automating Media Centers and Small Libraries: A Microcomputer-Based Approach. Englewood, Colo.: Libraries Unlimited, 1997.

Ogg, Harold C. Introduction to the Use of Computers in Libraries: A Textbook for the Non-Technical Student. Medford, NJ: Information Today, Inc., 1997.

Reed, Sally Gardner. Small libraries : a handbook for successful management. Jefferson, N.C. : McFarland, c1991.

Sager, Donald J. Small libraries : organization and operation. Fort Atkinson, Wisconsin : Highsmith Press, 1992.

Siess, Judith. The Solo Librarian's SourceBook. Medford, NJ: Information Today, Inc., 1997.

University of Waterloo. Library. Professional staff manual. 2nd revision. Waterloo, Ont. : University of Waterloo, 1992.

Vandercook, Sharon. Reference Manual : CORE, written by Sharon Vandercook, Deborah Westler and Mary Layman. Fresno, Calif. : San Joaquin Valley Library System, c1989.

Weiss, Edmond H. How to write usable user documentation. 2nd ed. Phoenix, Ariz. : Oryx Press, 1991.

Magazines :

Computers in Libraries (ISSN 1041-7915) Information Today, Inc.
143 Old Marlton Pike, Medford, NJ 08055-8750;609/654-6266;
Fax: 609/654-4309.

Online Resources:

Librarian's Resource Centre

Resources for librarians in special libraries.
<http://www.sla.org/chapter/ctor/toolbox/resource/>

Library Automation Pages

All about Library
Automation.<http://www.libinfo.com/libauto.html>

LibraryLand

An extensive collection of links for all aspects of library services.
<http://www.rcls.org/libland/llauto.htm>

"Library Automation Basics for Reluctant Librarians"

An informative article.
Available at: <http://www.thejournal.com/magazine/95/apr/feature3.html>



APPENDIX 1

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APPENDIX 2 Selected Library Automation Software Products

There are a great many library automation products on the market. The following is a list of selected products that are suitable for smaller libraries.¹ You can find out about other automation products on the Internet at Library Land at <http://sunsite.berkeley.edu/LibraryLand/> and at a long list of links to Library Automation Vendors at <http://www.palni.edu/~dennis/vendors.htm>.

Eloquent Systems Inc.
25-1501 Lonsdale Ave.
North Vancouver, B.C. Canada V7M 2J2
800-663-8172
604-980-9537
www.eloquent-systems.com

EOS International
5838 Edison Place
Carlsbad, CA 92008-6596
800-876-5484
760-431-8400
www.eosintl.com

Kelowna Software Ltd.
#200 - 2000 Spall Road, Kelowna, B.C., Canada V1Y 9P6
800-667-3634
<http://www.L4U.com>

Library Pro
Chancery Software
Suite 275-3001 Wayburne Dr.
Burnaby, B.C. V5G 4W1
800-999-9931
604-294-1233
www.chancery.com

Library World
CASPR INC.
100 Park Center Plaza #550
San Jose, CA 95113
800-852-2771
408-882-0608
<http://www.caspr.com/>

LibrarySoft
New Generation Technologies, Inc.
Dept. 844
P.O. Box 34069
Seattle, WA 98124
800-661-7112
604-323-0888

LIBRIS 2020
Baker & Taylor Books
2709 Water Ridge Parkway
Suite 500
Charlotte, N.C. 28217
800-775-3700
www.baker-taylor.com

Right On Programs
755 New York Ave.
Huntington, N.Y. 11743
516-424-7777
<http://www.rightonprograms.com/>

1 Source: Cibbarelli, Pam. *Directory of Library Automation Software, Systems and Services*. Medford, N.J.: Information Today, 1998.



COMMENTS