Chapter 7: Office administration

7.1   OUTLINE OF CHAPTER

This chapter provides advice and guidance on how to ensure a solid **administrative base** for the organisation. Without this, chaos and disorder are almost guaranteed. In addition to communicating with the public outside the office (see Chapter 8: Publicity and fundraising), members of the public communicate directly with the office through visits, telephone calls and correspondence. The chapter provides guidance on how to make **visitors** feel welcome and how to establish an appointments system and a telephone message system. It gives some tips for sending and receiving letters, and advice on how staff can best communicate internally through memos and office meetings.

One of the most important administrative systems to establish and maintain is an efficient **filing system**. The chapter gives detailed advice about how to do this. It also provides guidelines on what to look for when undertaking an **administrative audit**.

All organisations collect paper resources in the shape of books and documents. Many NGOs will want to establish a **resource centre** where they can keep these resources in an orderly manner and make them accessible to staff and others. The chapter gives detailed advice on how to manage paper resources and a resource centre itself.

7.2   AN ORGANISATIONAL STRUCTURE CHART

An organisational structure chart is a diagram that represents an organisation, identifying its employees and departments and their relationships to each other. Chapter 2 (Organisational governance) provides an example of a structure chart for a governing body. Some organisations will want to develop a similar chart to show office arrangements and lines of authority and responsibility.

Reasons for developing an organisational structure chart include the six points in the box below.

RELEVANCE OF AN ORGANISATIONAL STRUCTURE CHART
- It clarifies the lines of authority and how work is shared within the organisation.
- Employees feel part of the NGO when they see themselves on the chart.
- It shows outsiders how the NGO is structured and its main areas of work.
- It shows the different departments and the number of staff.
- It makes the delegation of responsibilities easier.
- A good structure should help the NGO reach its objectives.

It helps to involve staff when developing the chart so that they understand the organisation's lines of authority and decision making. Once a chart has been developed the governing body should approve it. A good organisational structure chart is well defined so that work is delegated and shared and lines of authority, responsibility, and reporting relationships are clear. An organisational structure chart should be adapted to the context, particular goals, and habits of teamwork in the specific organisation. There is no best structure: the best structure for one NGO may be very different from the best one for another.

The questions in the box below may be useful when discussing the structure of the organisation. Subsequent boxes give advice on writing up a chart.

EXERCISE: SOME KEY QUESTIONS ABOUT STRUCTURE
- What rules are there for the discussion of issues and decision making?
- What kind of membership policy is needed?
- What role will different individuals (staff, partner organisations) play in decision making?
- Who is involved in what decisions, and how?
- How will decision making be structured in the organisation? What kind of hierachy or system will there be?
- What type of organisational structure can best help achieve the organisation's goals and mission?
- How can the vision and mission statement be implemented through the organisational structure?

EXERCISE: WRITING UP A CHART
Consider what information an organisational structure chart could contain. It may include some or all of the following:
- the name of the organisation
- the date the chart was compiled
- the lines of authority within the organisation
- the names of departments
- the names of projects
- employees' names, job titles and possibly photos.

CHECKLIST: ORGANISATIONAL STRUCTURE CHARTS
Once the chart has been drawn up, check for the following:
- **consistency:** include all names and/or job titles.
- **clarity:** distinguish job titles from departments or sub-teams clearly.
- **completeness:** do not forget the organisation's members, volunteers, and part-time staff.
- **update:** as and when necessary, and decide who should be responsible for doing this.
- **place**: think about where to place the chart (eg as a poster in reception).

See Appendix 1 for an example of an organisational structure chart.

7.3   OFFICE COMMUNICATIONS

People outside the organisation communicate with the office in three main ways:
- They visit the office.
- They telephone the office.
- They write a letter (or send an email) to the office.

This section present some tips for the efficient management of these three types of communication.

How to manage office visitors
The very nature of NGO work means that the office should be **accessible**, particularly to the beneficiaries and client groups. Members of the public will also want to visit the office to find out more about the organisation's work and to offer or seek assistance. Sometimes government officials or representatives of other NGOs or international funding agencies will also come to the office for meetings. It is important that their **first impressions** of the office are positive.

TIPS FOR MAKING VISITORS FEEL WELCOME

- Install a signboard outside the office with the organisation's name, office hours and contact details, so that visitors will know what the organisation is and how to make contact with it. Some offices with fewer staff distinguish between 'office hours' and 'visiting hours', to reduce the demands that too many visitors can place on staff.
- Make a sign giving directions to the main entrance and reception area.
- Label the offices of individuals with the person's name and job title so that visitors can find the office that reception staff direct them to.
- Set up a reception area with at least two chairs and a small table.
- Put the organisation's brochure and annual report on the table for visitors to read while they are waiting.
- Keep an appointments book that shows when visitors are expected. Wherever possible make appointments for visitors to discourage unexpected visits.
- Design any noticeboards (vehicle control board, meeting board, etc.) nicely so that they make the office look more attractive.
- You may want to hang a display board showing the organisation's current activities. This could include photos (with captions) of staff or partners at work, workshops they have attended, and visitors to the office.
- Display the organisational structure chart, mission statement and strategic plan if you have them.
- Make sure that the reception area, however small it may be, is always clean and tidy.
- Take any steps necessary to make the office accessible to disabled people.

To ensure that the daily work of staff at the office is not endlessly interrupted by unanticipated visitors, it is advisable to establish an appointments system. Of course visitors will come to the office unexpectedly from time to time, but an appointments system will ensure that most visits are planned in advance for the benefit of both staff and the visitors themselves. The box below contains some tips for setting up an appointments system.

AN APPOINTMENTS SYSTEM

- Ask visitors to make an appointment in advance so that the necessary people are available to meet with them.
- Have some background information about the organisation and its work available to either give or show to the visitor, such as an organisational profile, the structure chart, annual report, and a list of completed projects.
- Ask the visitor to sign the visitors book and state his or her name, job title, address, telephone or fax number, email address, and organisation.
- Collect any information that the visitor gives the organisation and file it for future reference.
- Prepare for an informal office tour and visit to project sites if requested.
- Follow up the visit with a letter or phone call. This is extremely important.

The use of some basic administrative books and forms can also help in managing visitors (see appendices to this chapter for samples of these). They are summarised below.

BOOKS AND FORMS

Telephone messages
Whenever a person calls for someone who is not in the office, the Administrator (or Secretary, if the office has one) should write down the name of the person who called, his or her telephone number, the time and date of the call, and any message. The person who took the message should also sign her name.

Appointments book
The appointments book can be a diary or any other calendar that is used only to record appointments. The Administrator or the Secretary should record all the appointments and remind people about them closer to the time.

Visitors book
The visitors book can be a blank book. In it, visitors should sign their name, their organisation's name, address, telephone number, fax number, email address, and the date of their visit. Some visitors will just give a business card: the Administrator can attach that to the book instead. The Administrator can also write down later with whom that person met, and what was discussed. If the organisation uses a computer, the Administrator can put the visitor's information in a database or spreadsheet so that the organisation can keep a contact address list.

How to manage telephone calls

In addition to visitors, a large number of people are likely to be making telephone calls to the office. It is therefore important to think carefully about how best to manage these calls. The box below has some tips.

MANAGING TELEPHONE CALLS

- Some organisations employ a receptionist, but if you do not have the resources for this make sure that there is a rota of staff responsible for answering the phone.
- Answer the telephone by identifying the organisation. For example: '*Good morning, this is the X office. How may I help you*?' or '*Hello, this is the X office. How may I help you*?'
- If the person the caller wants to speak to is in the office, ask the caller his or her name, and then look for that person. If the person is busy, ask if she wants to speak to the caller. If not, take a message. If the caller will not give his name, then tell him that the person he wants to speak to is not available. Often callers who do not want to give their names are not making work-related telephone calls.
- If the person the caller wants to speak to is not available, tell the caller that. Then tell him or her your name and job title, and ask if you can help with anything. If not, ask the caller to leave a message. Fill out a telephone message form and include the caller's name, who the message is for, the time and date of the call, the message itself, the caller's telephone number, and the name of the person who took the message. When someone leaves a telephone message:
  - After taking the message, consider if it requires action or if it should just be passed on.
  - If the message should be passed on, write it down, put it on the desk or pigeonhole of the person it is for, and then follow up to make sure that this person receives it.

Although there will always be some personal telephone calls to or by staff in the office, it is a good idea to have some rules about this to prevent misuse of the office telephone.

How to streamline correspondence

In addition to visitors and telephone calls the office is likely to receive letters to which it will need to reply. The NGO may also decide to do regular mailings of information such as an annual report. The following tips will help ensure that office correspondence is dealt with efficiently.

SENDING AND RECEIVING LETTERS

Letter formats
- Set a standard way to write letters so that they are faster to write.
- Make sure that letters are proofread, that they include a reference number and that they look neat.

There are three main types of letters:
- **memo** – an internal message, informal (used within the office)
- **semi-formal** (also called semi-block) – a personal letter to someone the writer knows
- **formal** (block style) – a cover letter for official correspondence (job application, report, documents, etc), people the writer does not know, international correspondence for the organisation.

Addressing envelopes
- Put the sender's address either at the top left-hand corner or on the top of the back of the envelope (on the flap for closing it).
- Write the addressee's name and address in the centre of the envelope. Use clear handwriting and a dark pen because many countries use machines to sort the mail and if the address is not clear, the letter will take longer to arrive.
- Leave a blank space at the top right of the envelope for the stamp.
- It is unnecessary to put a telephone number on an envelope if it is being delivered through the postal service. A postal service will never call that number to deliver it. Also, some people may object for privacy reasons to their telephone number appearing on the envelope.

7.4   INTERNAL OFFICE COMMUNICATIONS

Within the office, staff members communicate with one another through meetings or conversations, by sending memos, by giving and receiving telephone messages and through office cooperation (people working together as a team).

How to hold effective office meetings?
Some internal office meetings will be held on a regular basis. For example, the Executive Director may decide to hold a staff meeting for the whole team once a month or more often. In addition, if the organisation has a number of programme staff, they may hold regular meetings to discuss programme issues. Similarly, if the NGO employs a number of administrative staff, they may want to hold regular meetings to discuss administration issues, including finance and staffing. It is advisable, however, to keep the number of meetings to a minimum, as they consume considerable time and may not be the most effective vehicle for getting things done.

Here are two tips for successful meetings:
• Hang a meeting board in the administration office that shows who is attending which meeting (inside or outside of the office). This also helps people who want to visit someone in the office. If they see that the person is in a scheduled meeting, they will know when to come back.
• Develop a procedure for what to do if a meeting is interrupted (by telephone calls, visitors, etc).

How to use office memos
Depending on the number of staff, the organisation may communicate some kinds of information through internal office memos. For example, the organisation may have a system for circulating project reports to various members of staff through this mechanism.

USING INTERNAL OFFICE MEMOS

• Hang short internal memos on the administration office noticeboard for everyone to see.
• Develop a circulation system for longer memos or letters. One method is to put everyone's name on a slip of paper attached to the memo. After a person reads it, she crosses off her name and passes it to the next person.
• Build mailboxes or pigeonholes for everyone for easier circulation of messages. Mailboxes can be simple boxes, stacked filing trays or wooden shelves.

How to create a good working environment
All these tips will help to make the office environment a welcoming and well organised place to work. However, it is also important to establish some **ground rules** to promote good working relations between staff. The human resources chapter looked at some of the advantages of developing a policy on harassment and bullying at work to deal with situations where a staff member feels that he or she is being unfairly treated. It is also sensible to set out some principles of good office discipline to guide staff on a daily basis.

OFFICE DISCIPLINE

• Speak honestly, in a friendly way and politely to each other.
• Respect each other's schedules and appointments.
• Respect each other.
• Help cover job responsibilities when others are away.
• Respect the privacy of others and of the organisation.
• Solve internal problems professionally.
• Be patient, trusting, and tolerant of each other.
• Share resources.
• Respect others when making jokes.
• Be tidy.

Although these points do not apply to every single office, the organisation should adopt those that will help improve relationships within the office. Remember, the more friendly and open people are towards one another, the happier they will be and the better they will work.

7.5 FILING AND RECORD KEEPING

The first step in setting up a solid administrative system is to introduce an efficient filing system. If organisational documents are easy to find and are all systematically kept in one place, it will be much easier for staff to find the documents and information they need. In addition, when the time comes to report to the governing body, funders or members, the information needed to compile the report will be much more readily accessible.

The following suggestion is a standard system that suits most offices. It is best to keep the records on projects separate from administrative documents.

Also, it is a good idea to **number files** so that people can find and replace them quickly. Big offices may even want to develop an **index system** for their files. For more information about indexing, see the section on setting up a resource centre.

A filing system can be set up in filing cabinets, using different drawers for different categories of document, or in box files kept on shelves. The important point is that they are all kept in one or two designated areas and that the files are updated regularly. Wherever possible each member of staff should be encouraged to do their own routine filing. Hence everyone needs to understand the system that is being used.

How to create an efficient filing system
From the previous chapters in this manual it is clear that the organisation will have a number of different types of information for different purposes which different members of staff and others need ready access to. They include those described in the box below.

DIFFERENT TYPES OF INFORMATION

- Reports and papers presented to the **governing body** as well as the agenda and minutes of its meetings. Documents filed under this heading might also be the completed annual financial returns or audit report for the governing body and an annual report.
- Documents relating to the **strategic plan**, the annual team work plan and individual work plans.
- Documents relating to **human resources and staffing**, which will include job descriptions, contracts of employment, documents relating to selection and recruitment, staff objectives and performance appraisals or reviews, health and safety information, staff sickness absence returns, staff leave records, information relating to any disciplinary or grievancy procedures, etc.
- Documentation and information relating to the **financial system** including the annual budget, income and expenditure reports, inventories, asset registers, procurement information, information about vehicle use and servicing, monthly statements of account, financial reports to funders, etc.
- **Project information** and project accounts, including information about funding agencies.

Spend some time looking at who in the office needs access to what types of information. This will help the administrative staff to determine where and how the information might best be organised.

EXERCISE: ACCESS TO INFORMATION

TYPE OF INFORMATION
Make a list based on the categories above of all the different types of information the NGO has or is likely to have under main headings and subheadings.

WHERE IS IT KEPT/ WHO HAS ACCESS TO IT?
Once the main headings and subheadings are agreed, look at each one and list those who need access to the information (eg governing body, governing body subcommittees, Executive Director, Finance Officer, project staff, individual staff, the public, etc). Put an asterisk against the subheadings containing confidential information.

It will become obvious during the course of this exercise who needs ready access to what information. This will help staff decide how to group different kinds of information.

Much information and documentation relating to human resources management is of a **confidential** nature. It is good practice, for example, to have a confidential file for each member of staff which that person can have access to with the authorisation of his or her manager (Executive Director for most staff, the Chair of the governing body for the Executive Director). These files should be kept separately in a locked filing cabinet and rules concerning access to them must be clear and transparent.

What type of filing system works best?
There are four main ways to set up a filing system, as outlined in the box below.

FOUR SYSTEMS OF FILING

Filing by date
Documents are filed in date order. For example, October 1, 1998 would go before December 12, 1998. Documents from 1990 precede those from 1995. Some people prefer to put the oldest documents at the back and the newest in the front. This is called reverse chronological order.

Filing by number
Documents or files are given a number and then filed in numerical order. Low numbers usually come before the high numbers. Numbers can be reference numbers on documents, or numbers of files.

Filing by topic (or subject)
Documents are grouped by their content, category or heading and subheading. For example, all correspondence is grouped together in one file and the financial receipts are placed in another file.

Filing in alphabetical order
Items are filed in order by the first letter of their title. The documents starting with A go first, followed by those starting with B, and so on until Z. If two documents start with the same letter, then put them in order by the second letter.

Remember, it is possible to use more than one method of filing.

For example, the files could be divided by topic (correspondence, projects, administration, etc) and by date (new financial documents behind the old ones in reverse chronological order). Look at the information needs of the organisation before deciding how best to arrange files.

Filing takes time, but establishing and maintaining a good system saves time. The example below uses a system of filing by category and heading under which each separate subheading is numbered.

A NUMERICAL FILING SYSTEM BY HEADING

100- PERSONNEL
110- Confidential individual staff files
120- Staff records (leave etc)
130- Payroll
140- Health and safety

200- FINANCE
210- Budget
220- Procurement
230- Asset register
240- Travel expenses
250- Petty cash records
260- Financial returns
270- Bank accounts
280- Financial audits

300- CORRESPONDENCE
310- Correspondence with government agencies
320- Correspondence with funding agencies
330- Correspondence with project partners
340- Correspondence with other NGOs

400- ORGANISATIONAL DOCUMENTS
410- Governing body
420- Subcommittees
430-Strategic planning
440- Other documents

500- PROJECT DOCUMENTS
510- Project proposals
520- Completed projects
530- Current projects
540- Future projects

600- OFFICE ADMINISTRATION
610- Office meeting minutes
620- Internal correspondence
630- Staff tour reports

Once a filing system has been designed and set up, it may be helpful to look at the checklist below to make sure that nothing has been forgotten.

CHECKLIST: FILING SYSTEMS

• Make sure that files are located in the most logical place. For example, keep all files in the same shelf or cabinet, or keep all administrative records in the Administrator's office and project files with the project managers. Be sure to separate what records are not actually files, but rather resources. For example, newspapers and training materials are resources, not files.
• If the files are overcrowded, look at their contents and throw away irrelevant, duplicate, or unimportant papers. Or keep the old files separate from the current ones. Every January, new files can be moved into the old files, starting with empty files for the year.
• If the names of the files do not really show what is inside them, then check their contents and either rename the file, move the papers that are not similar and start another file for them, or re-file the papers inside to the correct files.
• If the files are numbered, it is useful to prepare an index to hang on the wall or filing cabinet to make finding files faster.
• When redesigning a filing system, it may be a good time to look at the record keeping system and decide if the organisation should be keeping more records.

An improved filing system will need maintenance. Be sure to show the others in the office how the improved system is set up and how they can help maintain it. Invite the others to give feedback on the filing system so that they can continue to improve it.

7.6   ADMINISTRATIVE AUDIT

What is an administrative audit?
An internal organisational audit is a complete check of all administrative systems, except reception. It is similar to a financial audit, which checks the financial systems of the organisation (see Chapter 4: Managing finances). It is the most important tool for **monitoring** and **evaluating** administrative systems, as it checks to see that all systems are in place and working.

There are two types of audits, **internal** and **external**. Someone from within the organisation completes an internal audit. This person should be known to the organisation, but independent of its administration and finances. Somebody from the governing body or a member with some financial and administrative experience is a good choice. The internal audit is important for checking systems before an external auditor comes in.

When and how long will the audit take?
The audit should be done at least once a year.

The first time that an administrative audit is carried out, it may be time consuming because each document must be checked. However, after the first audit, if the staff responsible have corrected any weaknesses in the system, the auditor should be able to check everything in just a few days.

What should the audit look for?
In carrying out an audit, the auditor might want to follow the checklist below. If the auditor discovers weaknesses in the system, he or she should clearly explain what these are and how they might best be corrected. See Chapter 4 (Managing Finances) for more detail about financial audits.

CHECKLIST: INTERNAL AUDIT

A. INTERNAL SYSTEMS
- The NGO has a governing body (Board of Trustees or Board of Directors).
- There is a written organisational structure chart.
- There is a system for reviewing and following up reports that have been made for the organisation, and it is being implemented.

B. FIXED ASSETS
- The NGO has a clear fixed assets policy.
- The fixed assets policy is implemented.
- All fixed assets are recorded correctly in the fixed assets register.
- The fixed assets are counted regularly and the count is recorded.

C. VEHICLE MANAGEMENT
- The NGO has a comprehensive vehicle usage policy.
- The vehicle policy has been implemented.
- The NGO maintains a vehicle logbook, which is filled in completely and correctly.
- Procedures for vehicle servicing, insuring, tax and MOT (checking roadworthiness) are in place and up to date.

D. INVENTORY
- A written inventory management policy exists.
- The inventory policy is implemented.

When inventory is used, it is:
- authorised by the correct person
- properly supported with a supply request form
- properly recorded in the inventory (non-expendable supplies) register or supply control card
- the inventory is counted regularly and the count is recorded.

E. PERSONNEL AND PAYROLL
- A clear personnel policy exists and is implemented.
- All staff members have detailed job descriptions.
- There are defined systems of evaluating and measuring staff performance and they are in use.
- All staff members have current, written, signed employment contracts.
- Documentation and authorisation of payroll exists (such as timesheets and contracts).

How to do an administrative audit
Carrying out an administrative audit is not a complicated matter. The main thing is to be sure that it is thorough and systematic. Below are some examples of how to do this.

EXAMPLE: WHAT AN AUDIT LOOKS FOR

To do the audit, the auditor simply looks at standards of practice and checks to see if they are being met. If not, the auditor must write down exactly what the problem is.

For example, if the auditor is checking to see if *all fixed assets are recorded correctly in the fixed assets register,* then she or he will have to go and see all the fixed assets and check their condition, location, serial numbers, etc.

If, for example, the auditor sees that the new chairs do not have serial numbers on them, then he or she should write down that the Administrator needs to give the new chairs serial numbers.

When the auditor is finished, she should prepare a report with the findings and share it with the staff and governing body.

Then the auditor should make a list of **recommendations** for how the mistakes can be set right.

The Executive Director is responsible for seeing that the recommendations are followed.

7.7   SETTING UP A RESOURCE CENTRE

This guidance has been developed for organisations that want to set up a resource centre. Many local NGOs have various donated resource materials and would probably like to have more in the future to upgrade the knowledge of their staff and improve their performance. Usually, however, few people have the chance to look at the resources and make use of them because they are inaccessible.

What is a resource centre?
A resource centre is a place where reference materials are stored in an orderly way so that they are easy to find and use.

Resource centres contain books, magazines, training materials, and newspapers as well as other information that an organisation wants to make available. Most organisations have many reference materials, but most do not keep them in one place. If they are put together, grouped according to their topic, and labelled, they are much more accessible than when they are simply filed on a shelf inside a cupboard.

Resources include books, but also reports, videos, cassettes, newsletters, booklets and brochures. **Any information that may help people is a resource.** Items that are not really resources are letters, internal memos, and organisational records. The place where resources are kept should be

big enough to hold them all and should also be secure – a room that can be locked out of office hours, or a corner of a room for example.

One of the best things to do before setting up a resource centre is to visit others to get an idea of what is possible. The following questions can be asked of organisations that already have a resource centre.

EXERCISE: QUESTIONS TO ASK

Location
• Where in the office is the resource centre located?
• Is there a place for people to read the books so that they do not have to borrow them?

Resources
• Is there a written inventory of the resources?
• What non-book resources (videos, tapes, etc) does the resource centre have?

Users
• Who is permitted to use the resource centre?
• Who are the main users of the resource centre?
• How many people use the resource centre on average each week?

Borrowing
• What are the most frequently borrowed (or used) books or resources?
• For how long may books be borrowed? How many books may be borrowed at one time?
• What is the procedure for borrowing books from the resource centre?
• How many of the borrowed books are successfully returned?
• How many books have been lost or damaged by borrowers?
• How is security maintained at the resource centre?

Cataloguing
• How are the resources arranged?
• How are the books arranged?
• Is an international cataloguing system in use?

Management
• Who is responsible for maintaining the resource centre on a daily basis?
• Who makes decisions regarding the resource centre's management?

Acquisition (receiving new materials)
• How are new materials or resources found?
• How are new materials received and processed?

In the box below are the key steps to take when creating a resource centre.

STEPS TO TAKE: CREATING A RESOURCE CENTRE

1.   Make an inventory (list) of all of the resources by grouping the items together (for example, newspapers, reports etc).

   The most common items to record are the title (name of the book or resource), author (the person who wrote it), publisher (the company, university or organisation that produced it), classification of the book (its subject matter: history, administration, health, etc), and the number of copies.

   Some inventories also include the date of publication, place of publication, type of resource (book, newsletter, brochure, etc) and the number of pages.

2.   Once the inventory of resources is complete, they need to be classified so that they are easy to find. There are many ways to classify resources, including:
   ○ By topic. Group all the resources on the same topic in the same place.
   ○ By type of resource. Put all newspapers together, all brochures together, etc.
   ○ By alphabetical order. Arrange resources by either their titles or the last name of their authors.

   A standard way is to put the books in one place and arrange them by topic. Then, arrange all books in each topic in alphabetical order by the author's last name. Next, group the other resources (those that are not books) together and divide them by topic. Put them in magazine boxes and label the box with the subject, such as health, education, water, etc.

   If there are many resources, a more advanced system of cataloguing might be needed, but this arrangement is good for most small resource centres.

3.   Now, add to the inventory the classification that you have given each resource.

How to develop an inventory
The box below provides additional guidance for developing an inventory by following three easy steps.

Step 1

Title. What is the name of the resource?

- Normally, if a book title begins with *The*, it is added at the very end. For example, *The History of Somaliland* would be recorded in the inventory as *History of Somaliland, The*.
- Some books have a main title and below it, a subtitle. Both should be included on the inventory. A colon separates them. An example is *Building Partnerships for Participatory Development: A Report of a Workshop Held in Hargeisa, Somaliland.*
- If a book is one of a series, then it is important to include that on the inventory. For example, write *Algebra: Book I* instead of just *Algebra*. The title and number are separated like a title and subtitle.
- Sometimes books are updated and revised. Textbooks, dictionaries and history books are frequently revised. Therefore, the *Oxford Dictionary* is not exactly the same as the *Oxford Dictionary: Revised Edition*. Look for phrases such as new edition, revised edition, second edition, etc. They must also be included in the inventory.

Step 2

Author. Who wrote the book?

- The author is not always listed on a resource. For example, a newspaper, magazine, brochure, or newsletter rarely has one. Most books do name the author.
- Look for the word *by* on the title page for the author's name. *Illustrated by* tells the name of the person that drew the pictures in the book but the illustrator is not recorded in the inventory. *Edited by* means the person who brought all the parts of the book together (usually in a textbook). If there is no author, then the editor's name should be used, but after it, write (ed) to show that the person is not the author.
- If a book has two authors, then include both of them. However, if a book has more than two, write only the first one and then write *et al*. This is Latin and means 'and others'.
- When you write the author's name, put the last name first, then the first and second names. Internationally, resource centres list authors of books by their last name. If the person is Mohamed Ibrahim Egal, then it is written *Egal, Mohamed Ibrahim* (listed under E). But, if there are two authors, then only the first one is reversed, for example: *Clinton, Bill and Mohamed Ibrahim Egal* recorded under the letter C.
- Sometimes a book's title is somebody's name. In that case, the title page will have two names. When unsure which is the author and which is the title, look at some other pages of the book and the cover to work out which is which.
- If the author is not a person, but an organisation or ministry, then its name is not reversed in the inventory.

Step 3

Publisher. Who published the book?

- A resource is usually published by a company, university, or organisation. Usually the publisher's name is at the bottom of the title page, or at the bottom of the spine (side) of the book, or on the back cover. Look for words like *Ltd, Company, Publishers, Press,* etc to help find out who published the resource. Often the place of publication and the year of publication are also listed under the company's name, so be sure not to confuse them.

Once the inventory is complete, it can be presented in many ways. One way is to type it up and keep it in a file for people to use. If the inventory is computerised, then it is very easy to arrange and rearrange. Many resource centres have three inventories: one arranged by subject, one by author's last name, and one by title. When information is incomplete it is still possible to find items using one or other search tool on the inventory. Other words for the printed inventory are index or catalogue.

TYPES OF INDEX

Subject index
The subjects are listed in alphabetical order, and the contents inside each subject (health, water, education, etc) are arranged by the last name of their author, then title. This is useful if looking for books on a certain topic because it will show all the resources on that topic.

Author index
The resources are listed in alphabetical order by the last name of the author, then in alphabetical order by title. If there are three books by the same author, they will first be put in order of the author's last name, then sorted by the first name of their title. The author index is useful if the author is known, but the title or subject of his or her books is not known.

Title index
The resources are listed in alphabetical order by the first name of their titles. If the name of a book is known, then the title index will help.

Once an inventory of all resources is complete it will need to be updated regularly.

> **For example,** books get lost, new books arrive, and mistakes are found in the inventory (the book is really about water, not sanitation, for example, or the author's name is misspelled).

Users must also learn how to use the inventory. Having three inventories (or indexes or catalogues) can be very confusing for people who have never used them before. Be sure that all visitors see the inventories and understand how to use them when they first look for something.

Classifying resources
It is important to consider the best way to classify the resources: where should each item be shelved? Some tips are outlined in the box below.

CLASSIFICATION

- Before developing a classification system, look at the books the organisation has. Group similar books together and then make a list of the types of books you have.
- All books can first be divided up into fiction and non-fiction. Non-fiction books give information on a topic, such as history, science, or how to build something. A fiction book is one with an untrue story, and fiction books can be divided up into books such as historical fiction, science fiction, and mysteries.
- If it is not obvious how to classify a resource, look first at the title. If it is non-fiction, then the title provides a good clue about the type of book. Alternatively look inside the book and see what topics it talks about.
- Some books have a classification made by the publisher on the other side of the title page. Check there for more help.

How to manage a resource centre

Management of the resource centre includes record keeping, day to day management of the resources, and development of the centre.

IMPORTANT FACTORS TO CONSIDER

- Set up a resource centre **management system.** Decide who will manage it, who will be able to borrow which resources and for how long, and so on. If unsure about where to start, a visit to another more established resource centre might be useful.
- **Training** the users in how to use the resource centre is very important. Once everything is labelled, an index and/or the inventory will help show what the resource centre contains. Show users the index and explain how to find resources. Staff will also need training in the cataloguing system. If they do not know how to use it, they will be unable to replace books in the right place.
- Once the resource centre is functioning, it is important to see how **improvements** can be made. For example, if the centre is not being used, why not? If people are not returning the books, how can that situation be improved?
- When the resource centre is being used often, the manager can **monitor** how many books have been used and on what topic. If he or she knows what people want and need, then more books on that topic can be purchased when funds are available.

EXAMPLE: SAVE SOMALILAND TREES RESOURCE CENTRE

The purpose of **Save Somaliland Trees Resource Centre** is to provide information about development and the environment to both the SST staff and the NGO community.

Users: The staff, members, and governing body of Save Somaliland Trees as well as partners and friends of Save Somaliland Trees may use the resource centre. However, only staff, members and the governing body may borrow books from it. The resource centre will be open 8am-2pm every day (except Fridays and national holidays).

The **borrowing policy** of the resource centre will be as follows:
• The staff may borrow any resource from the centre to use in the office only on short loan. These resources must be returned by 2pm the same day.
• Staff and members may borrow general books, foreign language books, and textbooks for five days. They may be taken away from the office.
• Resources may only be borrowed and returned between 8am and 2pm and only the resource centre manager may authorise borrowing and returning.
• No one may take more than two books at one time on regular loan.

The **daily responsibilities** of the resource centre **manager** are to open at 8am, supervise the cleaning of the resource centre, help users of the resource centre, explain the rules to its users, check out and check in books, arrange books and close the resource centre at 2pm.

The responsibilities of the **administration team** are to help with book collection, help manage the resource centre, receive new books, assist with the inventory, and attend management meetings to discuss the effectiveness of the policies.

The administration team will meet regularly after the resource centre is open to discuss the effectiveness of these policies, to see what problems have arisen and how the centre's management can be improved.

7.8   CONCLUSION

If the systems recommended in this chapter are implemented the staff
team can expect to enjoy some of the benefits outlined in the box below.

GOOD OFFICE ADMINISTRATION MEANS …	
Organisational structure chart	The staff team and visitors to the office can visualise how the organisation is structured and what its reporting lines are.
Office visitors	Visitors will feel welcome and informed, and leave with a good impression of the office.
Appointments system	Visitors will have more guaranteed access to the staff member visited, staff will be less disrupted by visits and a record of visitors will be kept.
Reception system	Incoming telephone messages will be recorded and callers will experience good customer service.
Correspondence	Different letter formats will be used as appropriate and the quality of written correspondence will improve.
Office communications	Internal memos and meetings will be used to facilitate communications within the team.
Filing and record keeping	Different types of information will be stored appropriately and all documents will be securely filed and easy to access.
Administrative audit	Office systems will be regularly monitored so that they can be continually improved.
Resource centre	Books and other important documents will be well organised, classified, indexed and appropriately shelved so that staff and others can find what they need quickly.

APPENDIX 1

EXAMPLE OF AN ORGANISATIONAL STRUCTURE CHART
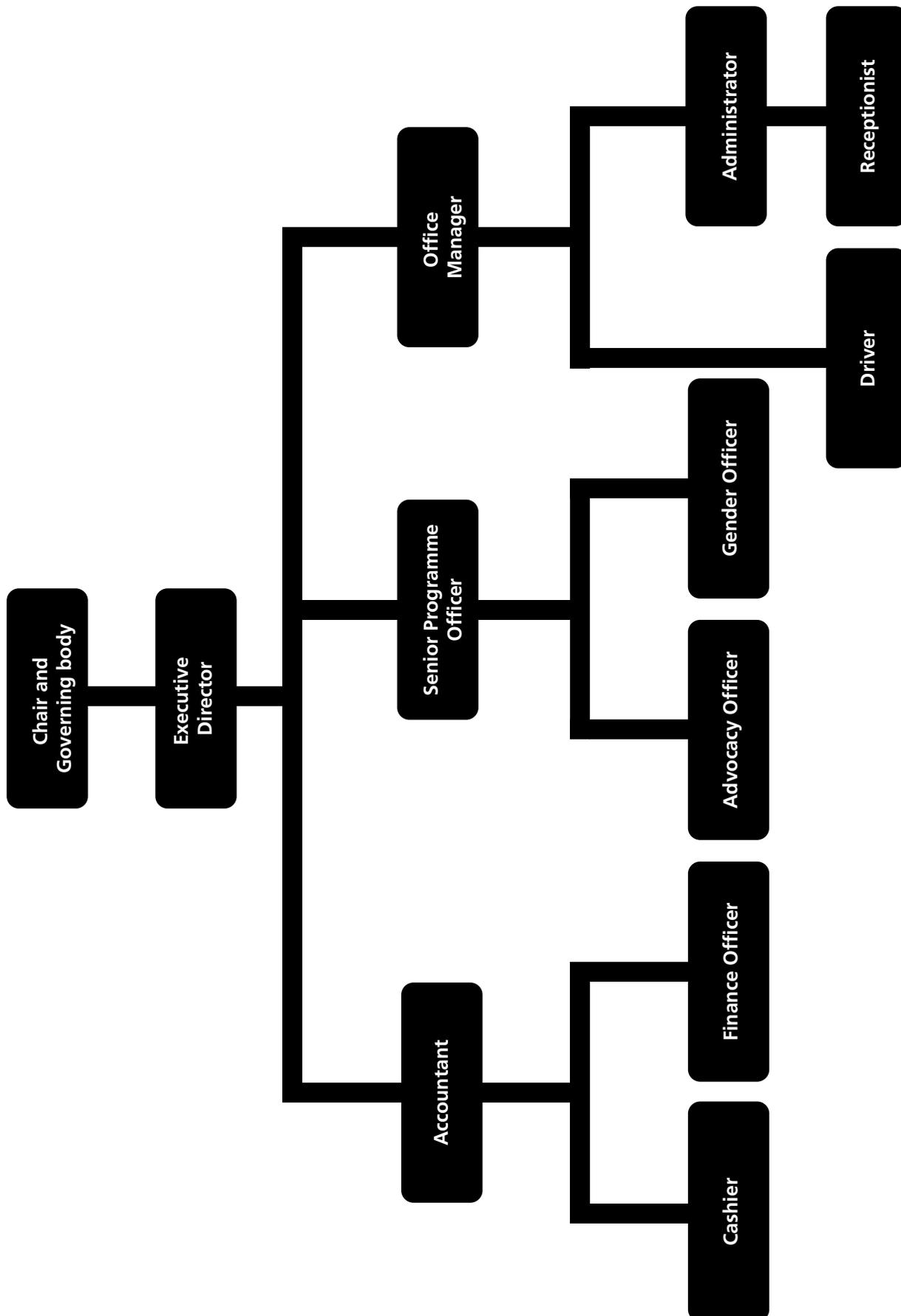
APPENDIX 2

TELEPHONE MESSAGE FORM

For: _____

Mr/Mrs/Miss _____ called you

at _____ am/pm on _____ [date]

☐   Please call back. Telephone number:_____
☐   Will call you later.
☐   Will visit you.
☐   Left a message for you:

Prepared by:

Name: _____

Signature: _____

Job title: _____

APPENDIX 3

APPOINTMENTS BOOK

Date: _____

Time:	Appointment with:	Place
8:00-8:30		
8:30-9:00		
9:00-9:30		
9:30-10:00		
10:00-10:30		
10:30-11:00		
11:00-11:30		
11:30-12:00		
12:00-12:30		

APPENDIX 4

VISITORS BOOK

Name	Organisation	Address	Tel/fax/email	Date visited

APPENDIX 5
SAMPLE MEMO AND LETTER STYLES

Memo

TO: Project Managers

FROM:

DATE: 14/8/99

RE: PM Training next week

This message is just to remind you that we have rescheduled our training for next Monday morning at 8am until noon. I hope that you will all be able to make it.

(*No signature – sometimes a handwritten name*)

Semi-formal letter

---

14 August 1999

Dear Aideed,

   Greetings. I am writing to you about the different styles of letter writing that I have learned in PM training.
   The second paragraph starts like this, indented again on its first line. There is no empty space between paragraphs, either. I hope that you understand the difference between this semi-formal style and the formal letter.

<div align="center">Sincerely,</div>

Notes for a semi-formal letter:
- Each new paragraph is indented.
- It is opened with Dear (followed by the person's first name) and a **comma.**
- The closing is informal: Sincerely, Regards, Yours truly, or Sincerely yours.
- It is signed by hand only (no typed name or job title underneath).

Formal letter

P.O. Box 683
Hargeisa, Somaliland
14 August 1999
Tel: 253-220006

Mr Abdulkarim Ahmed Moge
Project Manager, Circus Hargeisa
Hargeisa Voluntary Youth Committee
Hargeisa, Somaliland
252-213-4501

Ref: LCT/2.1/120/98

Dear Mr Moge,

I am writing to you to show you the format for a formal style letter. Every paragraph begins on the left side; it is not indented as with the informal style.

When you write a second paragraph, it must start another line below where it would in a semi-formal letter, like this. It is also not indented.

Yours sincerely,

Jane Smith

Jane Smith
Development Adviser

Notes for a formal letter:
- Instead of typing your address at the top, you can use letterhead paper.
- The letter is signed below (not beside) the closing and the full name of the sender, and the job title is typed below the signature.
- In the UK, the closing *Yours sincerely* is used for closing letters to people who you do not know, and *Yours faithfully* is used for closing letters to people you do know. In the US, *Sincerely* is the most common closing.

APPENDIX 6
FORMS FOR USE IN RESOURCE CENTRE

TITLE INVENTORY (INDICES)

Title	Author	Publisher	Classification

DAILY (OR WEEKLY) LOAN REGISTER

Title of the resource	Date borrowed	Borrower's name	Borrower's address	Date due to return	Borrower's signature

LIST OF AUTHORISED BORROWERS

Name	Organisation	Address

APPENDIX 7
CHECKLIST: MANAGEMENT AND DEVELOPMENT OF A RESOURCE CENTRE

Record keeping
The following records should be kept in the resource centre:
- subject, author and title indices
- regular loan register
- short loan register
- cashbook (for fines, etc)
- list of authorised borrowers.

Daily management
- Unlock the resource centre in the morning and be sure that it is clean.
- Do a quick check to see that all books are in their correct places and facing in the right direction.
- Open the regular loan register and look to see what books are overdue, due back in the resource centre that day or the next day. See who borrowed the book and its title. Remind borrowers that they have a book due.
- Help users with the inventories, using the resource centre, and finding books.
- Maintain security of the resource centre at all times.
- Check the short loan register at 1.30pm to see what resources are due back in the resource centre by 2pm and remind the borrowers they have books due.
- Check in and check out books as needed.
- Update the three inventories (author, subject and title) as needed.
- Catalogue, stamp, label and shelve new books.
- Plan, organise and facilitate monthly resource centre meetings.
- Maintain and update the resource centre noticeboard regularly.
- Follow up overdue or damaged books; collect fines and update cash book.
- Repair books as needed (attach comb binding, be sure titles appear on spine, etc).
- Lock the resource centre at 2pm.
- Make photocopies as needed and maintain the photocopier cash book.

Resource centre development
- Identify and find new books that users want and need.
- Develop a reception system in the resource centre for new visitors (tour, brochure, points of introduction, etc).
- Order book catalogues and subscribe to free magazines and newsletters.
- Prepare an orientation tour for users of the resource centre.
- Make displays (desk, wall and shelf) to encourage more people to borrow books.
- Review resource centre policies and think about how to improve them.
- Advertise the resource centre so that more people use it.
- Increase accessibility of the newspapers and new resources.
- Improve communication with resource centre users by informing them when new resources come in.
- Improve the classification system.
- Monitor what books are being borrowed and replace unused books with new ones.
- Bind workshop materials and classify them by topic so they are easier to find.
- Obtain more shelves and magazine boxes.

APPENDIX 8
RESOURCE CENTRE RECORDS

The **subject, author and title indices** should be kept either together in a file or in separate files, but all clearly labelled so that they can be used easily. Because these are big documents, they cannot be updated whenever a new resource arrives. The resource centre manager must see that new resources are handwritten on the inventory and reprinted either four times a year or whenever there have been many changes on the inventory.

The **weekly loan register** is a ledger that records information about books that have been taken out of the resource centre for five working days. For each resource taken out, the date borrowed, borrower's name, full title of the resource, the date that the book is due back in the resource centre, and the signature of the person who borrowed the book must be recorded. There must also be a space for the Resource Centre Manager's signature so that when the book is returned, she will sign to say that the borrower no longer has the resource. After the Resource Centre Manager signs the register, the resource is her responsibility, not that of the borrower.

The **daily loan register** is also a ledger, but it records information about what books have been taken out of the resource centre only for the day. It contains the same information as the weekly loan register and the same procedure is used to maintain it.

The **cash book** is just like a petty cash ledger. It is used to monitor the income and expenditure of the resource centre. For each transaction, it should include the date, description (payment of overdue book fine, expenses of book repair, etc), amount paid out or in, and the current balance. The resource center cash should be kept separate from the petty cash or photocopier income.

A list of **authorised borrowers** should be kept up to date. According to the policy, the members and staff may borrow books, but at some points, other consultants or partners may be authorised to do so. The Resource Centre Manager should keep a list of the people who may take books from the resource centre so that there is no discrepancy between policy and practice.