

Section 2: Management and finance

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- 2.1 Staffing
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2.1 Staffing

A resource centre needs competent and enthusiastic staff. Staff need to be selected carefully and encouraged to improve their knowledge and skills through ongoing training.

A large resource centre containing several thousand materials and providing a range of information services will need at least two full-time members of staff (or equivalent) – a resource centre officer, who has overall responsibility for developing and managing the resource centre, and a resource centre assistant to carry out routine tasks such as ordering and receiving materials. A resource centre with fewer materials or offering fewer services will need only a resource centre officer.

Ideally, the resource centre officer should have both knowledge of the subject area, and experience or training in resource centre work. If the person appointed lacks experience in resource centre work, it is important to provide training.

If it is not possible to appoint a resource centre officer with knowledge of the subject area, it is important to identify someone who has this knowledge, who can supervise and/or liaise with the resource centre officer. This person needs to be able to discuss the information needs of people who will use the resource centre, and to understand the importance of access to and use of information. This person could be another member of staff or a member of the resource centre advisory committee, if there is one (see Section 2.2).

If staff are seconded to the resource centre for part of the day, it is important that they have sufficient time for resource centre work. Otherwise they may not be able to do a satisfactory job, and may become demotivated. It is also important that the other work they do is complementary to their resource centre work. For example, if their work also involves training, publications development, outreach, advocacy, health promotion or counselling, this work and their resource centre work will each be useful to the other.

2.1.1 Job descriptions

A job description and person specification (a list of qualifications and experience necessary to do the job) need to be drawn up for each member of staff. This will help to recruit the right people and enable them to know what work they are expected to do.

Section 2.1.2 is a sample job description and person specification for a full-time resource centre officer. An alternative might be to recruit two resource centre officers to job-share, or employ volunteers. Volunteers should also have job descriptions.

If it is not possible to appoint a full-time resource centre officer (or equivalent), at least six to eight hours per week should be allowed for resource centre duties.

This would enable the resource centre to be open for at least two hours a day for three days a week, and would allow two hours a week for administrative duties.

If the resource centre is only open to staff within the same organisation, it could be open when resource centre staff are not on duty.

2.1.2 Sample job description of a resource centre officer

Resource Centre Officer

Background

The aim of the resource centre is to assist in the overall goal of the organisation to achieve health for all by collecting, organising and disseminating information in health and health-related fields. The resource centre serves staff of the organisation, including those responsible for training and those undertaking research. The resource centre is guided in its implementation and development by the Resource Centre Advisory Committee. The Resource Centre Officer is accountable to the Head of Information.

Main responsibilities

The Resource Centre Officer is responsible for the day-to-day running of the resource centre. Specific responsibilities are to:

- develop a collection policy in consultation with the Head of Information and the Resource Centre Advisory Committee
- gather information and materials to meet the needs of resource centre users, in consultation with the Head of Information and the Resource Centre Advisory Committee
- develop and maintain an effective ordering system for new materials
- process materials, including entering new materials into the accessions register and classifying and cataloguing materials
- ensure that the resource centre is user-friendly and accessible, including assisting users to identify materials
- develop activities in which users can share ideas and concerns on the role of the resource centre
- work with users to identify activities that information could support, and provide materials for those activities
- promote the services of the resource centre through activities such as displaying new materials in the resource centre, and at meetings and workshops
- encourage and promote the use of information
- produce regular statistical reports on the functioning and use of the resource centre
- liaise with the Head of Information and the Resource Centre Advisory Committee to implement the resource centre guidelines and procedures.

Person specification

Matriculation

Good administrative skills

Computer skills [if your centre is or may become computerised]

Good working knowledge of English and local language

Knowledge of the health sector

Resource centre experience or training

Able to communicate and work well with users

Able to take responsibility

Friendly, creative and enthusiastic

Committed to the aims of the resource centre

2.2 Advisory committees

An advisory committee representing users of the resource centre can help to ensure that the resource centre meets users' needs. A small, hospital-based resource centre could draw on hospital staff; a community-based resource centre has more varied sets of users to represent.

It is advisable to establish a committee with about five to ten people. The people should volunteer their time, but should be offered reimbursement of any travelling expenses.

The committee needs clear roles and responsibilities (see Section 2.2.1).



An advisory committee representing users can help to ensure that their needs are met

2.2.1 Sample responsibilities of a resource centre advisory committee

Resource Centre Advisory Committee

Responsibilities

The committee should:

- advise resource centre staff how to implement the resource centre's aims and objectives
- ensure that the needs of the resource centre and its intended users are being met
- advise and participate in planning activities
- assist with the selection of staff
- participate in developing a collection policy and selecting new materials
- decide the opening hours
- advise whether to lend materials and which ones
- participate in setting budgets
- encourage the use of the resource centre
- ensure that mechanisms are in place for monitoring and evaluating the resource centre.

Committee membership

The committee shall have five members.

Length of membership

Members shall be elected to serve on the committee for two years. They may be re-elected. A chairperson and secretary must be appointed. Other members may be co-opted as felt necessary by the committee.

Attendance

Any member who fails to attend three meetings in a row without good reason should no longer be a member. Another person should be elected in their place.

Official meetings

At least three members must attend a meeting to make the meeting official. If this is not possible the meeting must be postponed.

Number of meetings

The committee should meet every three months. Meetings should be planned at the beginning of the year. Additional meetings may be held when necessary, as decided by the chairperson.

Decisions of committee

Decisions will be passed when more than half the members in attendance agree by a show of hands.

Dissolution

The committee can be dissolved if felt appropriate by the majority of members.

2.3 Financial planning

Responsibility for major financial decisions is likely to rest with a senior member of staff of the organisation or institution hosting the resource centre. The resource centre advisory committee may be involved in helping to set spending priorities. Resource centre staff can manage expenditures for smaller items up to an agreed value.

Financial planning involves:

- establishing the financial needs of the resource centre
- identifying assured and potential sources of income, including income-generating possibilities
- drawing up regular – usually annual – budgets
- developing a plan for fundraising.

2.3.1 How to establish financial needs

Identifying the financial needs of the resource centre is the first step in financial planning. It means looking at the resource centre's objectives and planned activities, and working out what it will cost to meet these objectives and to carry out the activities. This initial financial planning exercise is very similar to drawing up a detailed budget. However, it should include all the things you want to be able to do, in an ideal situation. It should cover a fairly long period, such as three years or five years.

A budget is usually a more defined tool which sets out in detail a realistic expectation of what it actually will be possible to do. It usually covers a shorter period, such as a year.

Both in the larger exercise of identifying the financial needs, and the more detailed annual budgeting, it is important to include all the expected costs of running a resource centre. You will need to find out prices or obtain estimates from suppliers. Costs include capital costs, recurrent costs and possible special project costs.

Capital costs are for items that are bought once (or infrequently) and then used for several years. They include the costs of setting up a resource centre, or of replacing essential equipment or materials, such as:

- furniture
- computer equipment
- photocopier
- video
- duplicator
- overhead projector
- typewriters
- heaters/air conditioners
- bookshelves.

They may also include some initial start-up costs, such as the services of a consultant to plan the resource centre, or the purchase of an initial stock of materials.

It is sometimes useful to divide capital costs into large and small costs. Identifying large costs – for example, specific equipment such as a photocopier or computer – might be helpful in describing specific fundraising targets.

Recurrent costs are costs that need to be met regularly. They are sometimes called running costs or operating costs. They are usually estimated on an annual basis. Start by finding out the current cost. Then add a reasonable amount for inflation to cover these costs in later years. It is useful to know what the expected rate of inflation will be during the period you are budgeting for.

The largest recurrent costs are usually salaries and resource materials. A typical breakdown of recurrent costs might be:

salaries and benefits	60–70%
resource materials	20–30%
stationery/small items	5–7%
insurance	1%

Larger recurrent costs are likely to include:

- staff costs (including salaries, increments, promotions, social welfare contributions, training and travel)
- building rental
- building maintenance
- electricity
- water rates
- telephone, fax, e-mail
- auditors' and bank fees
- new additions to the collection (books, posters, videos, slides)
- annual subscriptions to periodicals
- computer hardware upgrades
- computer software upgrades including anti-virus protection.

Smaller recurrent costs may include:

- producing health learning materials, information packs and so on
- publicising the resource centre
- stationery
- postage
- computer supplies (paper, disks, printer ribbons/toner)
- small library equipment
- insurance
- miscellaneous items.

Special project costs are costs that are incurred to undertake a particular activity. These could include:

- organising a workshop or a training activity based at the resource centre
- developing a particular publication
- making an exhibition or presentation about the work of the resource centre or about one of the topics that it covers.

Once all the possible financial needs are identified, you are ready to look at what sources of income are assured (will definitely provide income) or expected (are likely to provide income).

2.3.2 How to identify sources of income

Depending on where the resource centre is located, there may be funds from a variety of sources to cover at least some of the costs. For example, a small resource centre that is being set up in a training institute, or in a teaching hospital, is likely to receive some funds directly from the institution in which it is based. These may be 'in kind':

- by paying the salary of the person working in the resource centre
- by contributing the building space, maintenance costs and some of the costs of the main utilities, such as heat and light
- by providing administrative or financial support and services.

The resource centre may also receive a direct financial contribution from a parent organisation - a sum of money to purchase essential equipment and materials to use for the general running of the resource centre.

A resource centre that is serving a group or a network of organisations or institutions might receive small, regular contributions or in-kind support from each of them. Local government, non-governmental organisations, religious organisations or professional associations may make regular contributions to the resource centre, because they value its work. You may be able to charge for some services, such as photocopying, or charge membership fees for users, or generate income from sales of publications.

Adding together all of these likely sources of funding and in-kind support will show you how much money you can expect to be available to undertake the activities that have been planned. It is very tempting to be over-optimistic about how much will be raised. It is a good idea, when you are doing your financial planning, to be pessimistic and expect the worst. Unless you have a firm agreement of the amounts that are going to be contributed, it is best not to include these amounts in your financial planning, other than to indicate that there is a possibility of receiving them.

With your optimistic list of financial needs, and your pessimistic list of possible income sources, you are ready to build a realistic budget for the next year, and to identify targets for fundraising.

2.3.3 How to draw up a budget

There are two types of budgets that you need to prepare:

- a minimum budget which is your basic operating budget
- a more optimistic budget which includes activities that you would like to do if the funds are raised.

The minimum budget should be based upon how much income you are certain of receiving, perhaps with a small degree of optimism that savings will be made through the year or that additional funds will come in. Generally, the minimum budget aims to balance the expenditure and income. This is sometimes called an income-led budget.

The minimum budget should list all the expected costs of running the resource centre over the next year. It is built up by taking the prices of each individual item, or estimates from suppliers. It should also include a suitable percentage to cover inflation.

If the resource centre has been running for some time, the annual budget can be based on the previous year's budget, taking into account any new items or services and likely inflation.

Indicate any expected income for the resource centre. Subtracting the expected income from the expected activities should leave a zero balance, or only a very small deficit (loss). If this does not happen, then it means that it is not possible to do all the things included in the expenditure section, unless additional funds can be raised. This means that some expenditure may have to be delayed or cut.

The more optimistic budget is the type of budget that you will usually prepare when you are developing proposals for future work. This type of budget sets out things that you would like to do, if you had the resources. A more optimistic budget helps to identify fundraising targets, because it is almost certain to have a deficit.

Establishing fundraising targets, and identifying work that you would like to do, is the first step in fundraising (see Section 2.4).

2.4 Fundraising and income generation

There are many different ways to fundraise and many different sources of funds. The choice of which methods to use depends on the range of acceptable potential donors (funders) in the area and upon the time and resources available to devote to fundraising.

2.4.1 Generating funds

It is important to identify the financial resources that the resource centre can generate itself. These might include:

- membership fees or fees for using the resource centre
- payment for services provided – such as photocopying or literature searches
- sales of information packs or publications
- acting as consultants to train or advise others.

There may also be a community of users who are prepared to make a voluntary contribution to the work of the resource centre, or it may be possible to raise funds by general appeals to the community members.

Contributions from local individuals or organisations could be in forms other than money. For example, people may be willing to volunteer a certain amount of time to help with basic tasks at the resource centre, or to provide a specific technical or professional skill, such as accounting, computing skills, marketing, designing, writing or painting. Businesses in the community might be prepared to provide staff on loan for a period of time to help with particular work, or they might pay for the cost of developing promotional material about the resource centre. They might also have useful materials that they would be willing to donate or lend to the resource centre.



Volunteers may have skills they can contribute to the resource centre

2.4.2 Applying for grants

Another source of funds may be grants from institutions or organisations that have money to finance development, charitable or educational activities.

Most funding organisations have specific requirements or conditions for granting money. Some only give money for certain types of activities, such as education, training or research. Some only give money for certain groups of beneficiaries, such as children, poor people or elderly people. Some only give money for certain locations, such as urban areas, rural areas, developing countries or a specific continent or region. Some only give money for work focusing on a certain topic or sector, such as HIV/AIDS, environment, education or communicable diseases.

2.4.3 How to find out about funders

If you are starting out and don't know any donor agencies (funding organisations), start by making a list. To do this:

- Write to or visit government departments in your country, asking whether they have any funds available for your sort of work.
- Write to or visit embassies in your country, asking for a list of donor agencies in their country.
- Write to or visit the offices of international organisations, such as United Nations agencies, the Organization of Economic Cooperation and Development and the European Union, asking how to approach them for funding.
- Approach local churches or other religious organisations and ask for the names and addresses of their international donors.
- Ask other organisations for names and addresses of donors.
- Ask colleagues and friends.
- Look up donor agencies in your local library, British Council library or other library.

Write to all the donor agencies you can, asking them for their funding criteria and areas of interest. Type the letter on headed paper, explaining who you are and what kind of work you do. Send them a leaflet about your organisation if there is one.

2.4.4 How to apply for grants

Wherever possible, try to have personal contact with the donor agency. Ask for guidelines for presenting proposals (funding applications) and ask what criteria they use to make decisions, what areas of interest they have, and when and

how often they give funds. Some donors will accept funding applications at any time. Some have specific procedures and times for considering funding applications.

Try to talk to someone within the donor agency before finalising any funding applications. You may want to visit the organisation, or ask someone from the funding organisation to visit your resource centre to see the type of work you do.

Once you have identified possible donors, you need to develop a clear funding proposal. The resource centre officer could be responsible for preparing a proposal, in consultation with his or her supervisor or a member of the resource centre advisory committee. The committee might want to discuss the proposal, or other staff in the organisation might be involved in developing and discussing the proposal.

The first time that you send a proposal to a particular donor, it is helpful to include any leaflet that you may have about your organisation, and reports about previous projects. Letters of referral or testimonials about previous work can also be useful. Also enclose your organisation's latest annual report and financial accounts, if they are available.

The way you present the information in the funding proposal is important for convincing the donors that your project is worth funding. Always follow the guidelines set out by a donor, and answer any questions they set. Be precise and clear about what you want to do, how much funding you require and how you will use those funds.

Don't use too many words. Briefly describe the problem you are tackling and how you intend to tackle it.

When you have received funds, remember to say thank you. And remember to keep in touch with the donors and let them know how you are getting on with the project that they are supporting. This may help with future funding.

2.4.5 How to prepare a funding proposal

Follow any guidelines provided by the donor agency. Keep your proposal short and concise. Divide it clearly into sections. If your organisation is already established, add other information such as an annual report and audited accounts as an appendix. But do not add unnecessary documents just to make the proposal look longer. Funders prefer short project proposals.

You will need to include the following:

Title of the project Make sure that the project has a name that clearly identifies it.

Summary This should be no more than one page. It should explain the reason for the project, the aims and proposed activities, how long the project is planned to take and the amount of money needed.

Statement of the need Explain why you want to do this project at this time and why the need for it exists. If appropriate, include a brief description of the geographical area, target group (the people who will benefit from it) and reason for selecting this target group.

Aims and objectives of the project Explain *what* you hope to achieve (not how you hope to achieve it - this comes next).

Strategy Describe *how* you hope to achieve the aims and objectives – what activities you will undertake, including monitoring and evaluation (see below). Be clear about the order in which these activities will be carried out, when each activity will start and how long it will last, and where each activity will be carried out.

Organisational background Briefly describe your organisation, its legal status, and the people who will be working on the project. Explain why you are qualified to do this project. Explain what work you have done previously that has given you the right experience for the project. Explain how this project fits with other activities of your organisation.

Monitoring Monitoring means checking how the project is developing, to make sure that everything is happening as it should, that activities are being carried out on time, and that, if anything goes wrong, there is a system for informing those responsible and putting it right quickly.

Evaluation Evaluation means finding out whether your project has achieved its aims. You must build evaluation plans into your overall strategy. Explain what methods you will use to measure the results of the project.

Budget Make this as realistic as possible. Make sure that items in the budget are consistent with your aims and strategy. Use headings that reflect the way the project will be set up, but that are easy to identify – for example: Salaries, Equipment, Stationery, Communications, Rent, Travel.