# OCS Coding Structures

## Cataloguing Guidelines for Donors and Partners

Version 3 February 2011

The following guidelines are intended to guide those who will be involved in content management/development of the OCS Donors and Partners lists. These rules rely heavily on the US Library of Congress’ online tool, the ***LC Authorities*** (available at [http://authorities.loc.gov/](http://www.google.com/url?q=http%3A%2F%2Fauthorities.loc.gov%2F&sa=D&sntz=1&usg=AFQjCNFgp_qArB7RGaZNkw8YLhBd5a3Dcw) ). Periodic revision of these rules is necessary for the lists to reflect the latest information about donors and partners and to adhere to international standards.

**Tag 1: Associations/Organizations/Institutions (AOIs)**

1.1. AOIs’ Names

1.1.a. General rule: Use the full English name of the AOI in the first column even if ***LC Authorities*** prescribe the use of acronyms for organizations better known through their acronyms (e.g. UN Organizations) or for others whose standard entry in LC authorities is the vernacular name, e.g. in Hebrew, Polish, or other languages. (Full name in English is preferable because LC is not consistent in this aspect: some are entered under local names (e.g. Arabic, Swedish, etc., some under acronyms, and others in English)

1.1.b. Generic names of associations, organizations, or institutes need to be qualified with country names in round brackets, e.g. Agricultural Research Council (South Africa), Economic and Social Research Council (Great Britain); National Agricultural Research Institute (Mozambique) , etc.

1.2. Government offices

1.2.a. Use the country name, followed by the office name, e.g.  Australia.  Bureau of Agricultural Economics, Israel. Ministry of Agriculture, etc.

(This will ensure that official entities of one country are grouped together thereby facilitating search. Using country name first will have all offices of one country together such that by searching a country name, all government offices in that country will be in the hits list.  If the office comes first followed by country names, doing a search by office name would generate a long list of generic office names and the searcher will have to scroll down the hit list to be able to find a Ministry in Sweden, for example).

1.2.b. Government offices operating within a larger body should be entered under the name of the larger body followed by the subordinate office, e.g. United States. Dept. of Agriculture. Agricultural Research Service; China. Ministry of Agriculture. Potato and Sweetpotato Product Quality Supervision and Testing Center (Zhangjiakou); Philippines. Dept. of Agriculture. Bureau of Agricultural Research, etc.

1.3. Programs/Projects

Use the lead agency/organisation’s full name, followed by name of the project. Classification or type to be used should follow rule for tag no. 5 (assign as per lead organisation).Example: Australian Agency for International Development. Cambodia-IRRI-Australia Project; International Development Research Center. Medicinal and Aromatic Plants Program in Asia; Food and Agriculture Organization of the United Nations. Project on "Strengthening Household Food Security and Nutrition, etc.

1.4. Embassies

1.4.a. Use the format : Embassy of country name followed by the city or country of location in round brackets, e.g. Embassy of Canada (Indonesia), Embassy of the United States (Philippines), Embassy of Israel (Great Britain), Embassy of the Republic of Korea (Washington, DC) etc.

1.4.b. Embassies that carry prefixes in their official names should be entered as they are officially known, followed by the city or country of location, e.g. Royal Norwegian Embassy (Nairobi, Kenya); Royal Embassy of Saudi Arabia (Great Britain), etc.

1.5. Field or Country Offices of AOIs operating independently

1.5.a. Use the name of the AOI followed by the name of the regional or country office, e.g. United Nations Environment Programme. Regional Office for Asia and the Pacific; International Development Research Centre (Canada). Regional Office for West and Central Africa, etc.

1.5.b. A variant to Rule 1.5.a. If the title ‘Regional Office” is not used officially, then it is enough to use the name of the AOI followed by the name of the region or country in round brackets, e.g. U.S. Agency for International Development (Nairobi, Kenya); World Vision (Cambodia), United Nations Development Programme (Eastern and Southern Africa), etc.

1.6. Names in Other Languages

1.6.a. Use full names in other languages if the AOI is better known by that name, e.g. Empresa Brasileira de Pesquisa Agropecuaria, Institut National de la Recherche Agronomique du Niger, etc.

1.7. Names not found in LC authorities

1.7.a. If not found in LC authorities, use the full name as given in the organization’s web site or other sites that mention it.

1.7.b. Refer to the AACR Rules for Headings for Corporate Bodies. AACR2 rules are the international standards followed by cataloguers worldwide. Description of this source may be found at this site  [http://www.aacr2.org/](http://www.google.com/url?q=http%3A%2F%2Fwww.aacr2.org%2F&sa=D&sntz=1&usg=AFrqEzfF_MHM8-tea7G4CtoZzd4VDO7RdA).

**Tag 2. Acronyms**

Use the acronym(s) by which AOIs are known, if available. This may be sourced from LC Authorities or the web site of each.

2.1. Options for acronyms:

Double acronyms. Whenever two acronyms are used together, for example organization + program acronyms, enter both, separated by hyphen and no space.

2.2. For identical acronyms of institutions in various countries, add the county name in round brackets, e.g. INIA (Peru); INIA (Venezuela); INIA (Uruguay), etc.

**Tag 3. Variant Names**

Give the variant names, former names or other names by which the AOI are known, if found in LC Authorities, web sites, or other reference sources.

**Tag 4. Country/Location**

4.1. Give the full names of country of location (headquarters) based on the ISO list at this site http://www.iso.org/iso/english\_country\_names\_and\_code\_elements

4.2. For programs/projects, use the country where the project is being implemented.

**Tag 5. Types (Categories) – OCS Proposed**

5.1. Classify each entry based on the codes given below. If not familiar with the nature of the organization or institution, go to their web site and read the “About us” section to find the type.

Table 1. OCS-Proposed Type Codes

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|  | ***Type Codes Used*** |  ***Type Label*** | ***Definition*** |
| 1 | AI | Academic institutions (universities, colleges, etc.) | Educational institutions : universities, colleges, academies and other institutions of learning |
| 2 | ARI | Advanced research institutions | international organizations conducting advanced research ("typically in one geographical location in either an industrialized or more advanced developing nation; and organized to conduct a diversity of research programs deemed by merit review to be of the highest international quality in personnel, infrastructure, and research output.") |
| 3 | CG | CGIAR Center/Program | All CGIAR centers and programs, including SWEPs System-wide Programs |
| 4 | CGCP | CGIAR Challenge Program | Challenge Programs are disaggregated from CG for funding/collaboration tracking purposes |
| 5 | CRP | Consortium Research Program |  CGIAR CRP, disaggregated from CG for funding/collaboration tracking purposes |
| 6 | DO | Development organizations | International organizations concerned with economic development (not to be used for FI that while devoted to development are primarily concerned with collecting, managing and disbursing funds (e.g. WorldBank, Asian Development Bank, etc) |
| 7 | FO | Foundations | Non-governmental organizations established as nonprofit corporations or as charitable trusts, with the principal purpose of making grants to unrelated organizations, institutions, or individuals for scientific, educational, cultural, religious, or other charitable purposes. |
| 8 | FI | Financing institutions | Institutions which collect funds from the public and place them in financial assets, such as deposits, loans, and bonds, such as banks, trust funds |
| 9 | GO | Government | government offices and departments |
| 10 | IO | International organizations | organizations whose membership consists of several countries within and outside a region and not engaged in research\* |
| 11 | MU | Multi-donor Partnerships | Two or more organizations or institutions providing financial or technical support to a project(to be used for a grouping of donors that cannot be classified clearly by the lead organization type, and when there are no specific reporting requirements) |
| 12 | NARS | National agricultural research system | local research and extension AIs |
| 13 | NGO | Non-governmental organizations | self-explanatory, including civil society organizations (CSO). For NGOs that are also CSOs, use NGO-CSO\*\* |
| 14 | PRI | Private Companies | privately owned corporations/companies |
| 15 | RO | Regional organizations | organizations whose membership consists of several countries within a geographical region; "these are regional and within the CGIAR context they are often facilitating/networking organizations for agricultural research activities. For example, APAARI - Asia-Pacific Association of Agricultural Research institutions; FARA – Forum for Agricultural Research in Africa." |
| 16 | SRO | Subregional organizations | same function as RO but more focused within a region: ASARECA – Association for Strengthening Agricultural Research in Eastern and Central Africa, or COFAR (Conférence des responsables de la recherche agricole en Afrique de l'Ouest et du Centre). |
| 17 | IARC | International Agricultural Research Centers |  a research institution managed by a university or operating independently, and organised to conduct research programs of international quality in personnel, infrastructure and research output. Not to be used for CGIAR Centers and Programs (which are grouped separately for funding role and internal reporting purposes). |

\* IO: around 10 instances of IO were reclassified in the final Donor list. This type is described here but not in use, due to its lack of specificity.

\*\* NGO-CSO is used for sampling purposes in the cataloguing work for OCS in order to monitor the frequency of CSO and consider the introduction of this type. A definition of CSO is still missing

**Tag 6. Web Address (URL)**

6.1. Cut and paste the URL of each AOI from the Internet . Use the official web site/ home page when available or

6.2. If there is no official web site, use sites that refer to the AOI, qualifying this with the phrase “Mentioned in”

6.3. In case reference to the AOI is not available on the web, use the note “no web site”

Note: In instances where the above rules do not apply, please consult the LC Authorities or AACR2.