

Library Trends

TRENDS

LIBRARY

Dual-Use Libraries

Sarah McNicol, Issue Editor

Dual-Use Libraries

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Library Trends, a quarterly thematic journal, focuses on current trends in all areas of library practice. Each issue addresses a single theme in depth, exploring topics of interest primarily to practicing librarians and information scientists and secondarily to educators and students.

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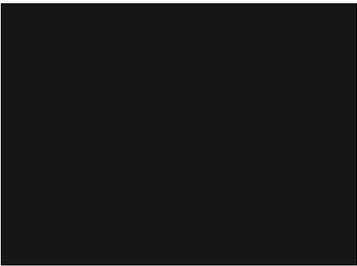
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2

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CONTENTS

Introduction <i>Sarah McNicol</i>	485
Dual Use Libraries: Guidelines for Success <i>Ken Haycock</i>	488
Libraries Like No Others: Evaluating the Performance and Progress of Joint Use Libraries <i>Alan Bundy and Larry Amey</i>	501
What Makes a Joint Use Library a Community Library? <i>Sarah McNicol</i>	519
Joint Use Libraries as Successful Strategic Alliances <i>Pete Dalton, Judith Elkin, and Anne Hannaford</i>	535
Just Collaboration or Really Something Else? On Joint-Use Libraries and Normative Institutional Change with Two Examples from Sweden <i>Joacim Hansson</i>	549
Building the Beginnings of a Beautiful Partnership <i>Kathy Sullivan, Warren Taylor, Mary Grace Barrick, and Roger Stelk</i>	569
Changing Places: Personnel Issues of a Joint Use Library in Transition <i>Patricia T. Bauer</i>	581
Health Libraries as Joint Use Libraries: Serving Medical Practitioners and Students <i>Linda Dorrington</i>	596

Organizing Electronic Information to Serve the Needs of Health Practitioners and Consumers <i>Eve-Marie Lacroix and Joyce E. B. Backus</i>	607
Joint Use Libraries: Implementing a Pilot Community/School Library Project in a Remote Rural Area in South Africa <i>Sophia le Roux and Francois Hendrikz</i>	620

Introduction

SARAH McNICOL

Libraries in all sectors are coming under increasing pressure from governments and other policymakers to cooperate. Various factors might drive this call, including funding constraints in both the library and education sectors; calls for schools to improve links with their local communities; and the trend for public libraries to offer other community services to help attract nontraditional users. Although cooperation might take many forms, including resource sharing, reciprocal access arrangements, joint promotions, and collaborative learning activities, joint use libraries serving two or more client groups in the same building are, as Bundy (2002) has put it, “the ultimate form of co-operation.”

Although the concept of joint use libraries dates back to the nineteenth century, their popularity has fluctuated over time and from region to region. There was political support for the concept in South Australia in the early 1970s and in Florida in the 1990s, for instance (see Bundy, 1998; Aaron, 1992). Despite continued reservations from some within the library profession, the current emphasis on collaboration means that joint use libraries have, probably, never been more relevant to public policy. In the UK, for example, the number of joint use libraries appears to have increased significantly over the last five years; they are seen as a politically attractive option in response to current government initiatives and were advocated in the 2002 Audit Commission report, *Building Better Library Services* (2002). Elsewhere, growing interest in this area is indicated by the fact that in the United States, the ALSC (Association for Library Service to Children), AASL (American Association of School Librarians), and YALSA (Young Adult Library Services Association) have recently established a Joint Task Force on School/Public Library Cooperative Activities.

This issue of *Library Trends* brings together articles by both researchers and library professionals to examine recent developments in joint use

libraries. The first three articles provide an overview of joint use libraries. Haycock's article draws on more than thirty years of research into joint use libraries to determine predictors of success. Bundy and Amey focus on evaluation, outlining a methodology suited to the unique nature of joint use libraries. McNicol's article considers the effect of joint use libraries on the local community, something that is normally seen as more problematic than the effective provision of library services to educational users. The remaining contributors present case studies from different perspectives and regions of the world. These emphasize the fact that, although joint use libraries are most frequently thought of as shared school-public facilities, there are many other possible combinations.

Even on a small scale, implementing a joint use library can be an extremely complex undertaking. The challenge can be even greater when the project is on a large scale such as a joint university-public library. Dalton Elkin and Hannaford, and Hansson explore these issues. Dalton et al. describes the proposed development in Worcester in the UK, where a joint university-public library is being planned with input from the local further education college as well as the regional chamber of commerce. Hansson looks at joint use library provision in Sweden. Using two examples of joint public-university libraries, he considers whether joint use libraries are "a new form of library" or simply a convenient administrative arrangement.

Sullivan, Taylor, Barrick, and Stelk are, or have previously been, employed at the College Hill Library in Westminster, Colorado, a joint college-public library that has been open since 1998. Their article presents a case study from the perspective of practitioners, describing the background to this development and the main challenges the library has faced as well as the successes it has experienced.

Bauer's article also involves a joint college-public library; she focuses on personnel issues experienced in a joint use library in transition. Building on research carried out in 1995, she considers the implications of moving an existing joint use (middle) school-public library to a college setting.

Medical or healthcare libraries in universities or health provider organizations offer services to both students and healthcare professionals. They are, therefore, effectively joint use libraries although they are often not recognized as such. Dorrington describes recent developments in medical and nursing education and the National Health Service in the UK and considers what these have meant for funding, services, and resources in this type of joint use library.

An interesting variation on the usual form of joint use library as shared physical premises is presented by Lacroix and Backus. The U.S. National Library of Medicine serves both health scientists and consumers through online information provision. Their article suggests how such an electronic library can act as a joint use library.

Le Roux and Hendrik also offer a twist on the usual form of joint use library in describing developments in South Africa. The model of a joint school-public library that had been adopted in many other countries is not suited to local conditions; this has led to the development of a public library-based community-school library.

Hopefully, this edition of *Library Trends* will stimulate further discussion about the merits and problems of joint use libraries and the factors that can ensure their success. By demonstrating that the concept of a joint use library can be viewed much more broadly than simply a shared school-public facility, it aims to encourage wider recognition of joint use libraries in all their forms.

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Sarah McNicol is a researcher at evidence base Research & Evaluation Services at the University of Central England in Birmingham, UK. She has worked as lead researcher on a variety of research projects, mainly in the areas of school libraries, learning and young people's use of libraries and information. This led her to develop a particular interest in joint use libraries. She carried out one of the first research projects into this topic for a number of years in 2003 and has since been on a study visit to joint use libraries in Norway; organised a UK conference on joint use and co-located libraries; and established an online community of practice intended for library staff, policymakers and researchers involved in joint use libraries.

Dual Use Libraries: Guidelines for Success

KEN HAYCOCK

ABSTRACT

Combined school and public libraries have been studied extensively for more than thirty years. Common advantages and disadvantages, together with typical problems, have been identified. From the work of researchers in three countries, predictors of success can be articulated: the population served is less than 10,000; a formal planning process involving the stakeholders was undertaken; a written legal agreement for governance, administration, finances, and operations includes guidelines for evaluation and dissolution; a decision-making board or management committee develops policies and procedures and engages and evaluates the director; an integrated facility is conveniently and visibly located, accommodating a variety of groups and resources with a separate area for adults and designated parking; the library is connected with a larger network, regional system, or consortium; the principal has a strong desire for success and teachers support the concept; one highly motivated professional librarian is in charge; there is regular communication and planned cooperation between public library and school staffs; and there are no restrictions on access to resources or on the circulation of materials.

INTRODUCTION

Dual use libraries (note: dual not duel!) are not new. The language changes over time but the essential elements remain the same. Whether discussing dual use libraries, the school-housed public library, the joint-use, combined, or community library, or co-located libraries, the basic principle is consistent: a common physical facility from which library services are provided to two ostensibly different communities of users.

It is important to distinguish dual use libraries from other levels of cooperation. Generally, libraries and systems may cooperate at least informally in sharing resources, services, and expertise. These levels of cooperation may range from simple courtesy (class visits), to specific services for a related group (homework centers), to more formal cooperation (joint programs for promotion of reading); much less common is collaboration, in which two equal partners solve common community problems together (for example, an outcomes-based joint family literacy initiative).

Although terms are often used interchangeably, this article distinguishes between cooperation between two agencies and actual co-location of staff, collections, and services. There are many examples of successful cooperation (see, for example, Haycock, 1989, for a succinct summary of possibilities). There are fewer examples of successful co-location viewed through the lens of rigorous assessment.

The most common dual libraries are combined public (that is, secular, fully tax-supported) school (more commonly high school than elementary school) libraries and public libraries, usually in smaller communities. Less common are dual academic and public libraries; where these occur they are typically college and public libraries, less commonly large universities. The most recent notable exception is the San Jose State University Library and the San Jose Public Library in California. This has been variously described as a consummated courtship, a mutually beneficial relationship, a marriage of convenience, a planned or arranged marriage, and a shotgun marriage, no doubt depending on one's philosophical position and perspective rather than a particular set of key success factors.

Regrettably, the possibility of dual use libraries not only inflames passion but also seems to release all reason. One need only peruse the professional literature to realize that research is less commonly reported, where it even exists, than the experiences of both zealots and nonbelievers. Titles and subtitles include "A success story!" "Together at last," "The long over due partnership," "A call to action!" as well as "A case against combination," "Don't do it!" and "A blueprint for disaster." The many, many examples profiled are based on assumed or presumed successes and the experiences of unmitigated catastrophe. The focus of this article is specifically on school and public library combinations and the research that informs predictors of success.

Given certain conditions, mergers of school and public libraries may benefit both the community and the school. Where at least minimum separate service is not provided, combined facilities might be better, but they have not proven to be more economical when compared to an equivalent level of independent service; and they are usually initiated by school administrators and school boards due to their own lack of staff or funds. Indeed, one criterion for determining whether to proceed is whether the level of service will be at least equal to, or better than, two separate entities.

Articulation of general advantages and disadvantages, positive aspects and negative aspects, have developed from early reports of public librarians' unease with the "school-housed public library" (White, 1963). These have been extended by more recent examples reported in the literature.

ADVANTAGES AND DISADVANTAGES

To start with the upside, possible advantages or positive aspects of integrated services can include an improved collection, extended or better service, less duplication of effort and resources, more electronic and media services, and better use of funds. This can translate into professional staff where none existed previously, longer hours, and a broader range of information sources and literacy programs for the community. The bottom line is that there may be no viable alternative for a reasonable level of school or public library service in a small community. A joint library can become a community focal point.

Possible disadvantages or negative components include the possibility that fewer adults are willing to use the school library, especially during school hours, rather than a separate facility, sometimes due to a location that is not central and sometimes due to a perceived intimidation by an overwhelming student/teen population and presence. Similarly, some out-of-area students may choose not to use an alternative or rival school's library. Other reluctant users have been young mothers and school dropouts.

Occasionally, school staff experience a frustrating disturbance of school activities, for example, through the unexpected arrival of a group of preschoolers or use by surrounding small independent and parochial schools with no library facilities. More limited facilities can then become problematic due to increased crowding. The overwhelming school context may result in competition for attention between children and adults, to the neglect of the public library component. An inability of limited staff to deal with a range of students and adults or a single program of limited service can result. There is also the perennial concern about restricted circulation of materials and possible censorship of material, even prior to purchase, due to the school's role of acting legally *in locus parentis*.

COMMON PROBLEMS

In addition to common advantages and disadvantages, there are several problems inherent in many dual use facilities. There are often, for example, basic differences in purpose, resulting in role conflict (see Jeffus, 1996, for a useful comparison in chart form). Thus, there is the possibility of undue stress being placed on the one librarian who now serves two supervising bodies, each with its own values, mission, vision, goals, and priorities.

The school exists to educate children. The focus of the school librarian, therefore, is on formal instruction. Research suggests that impact on student achievement is greatest when the school librarian and teachers

collaborate to plan units of study that integrate information literacy strategies and skills in the curriculum. It follows, then, that the school librarian will be an experienced teacher (the norm in Australia, Canada, and the United States) with additional qualifications as a teacher-librarian. From this starting point, the role of the teacher-librarian, the nature of the collection, and policies and procedures regarding access and use all support the mission of the school's program. Even when a public library adopts a role of support for formal education, as distinct from informal lifelong learning, the structure and systems are not so closely aligned with the school. The public library, on the other hand, as the marketplace of information and ideas—the people's university—focuses on the individual and his or her self-defined pursuit of knowledge.

Due to location (the school is rarely in high traffic areas such as business and retail centers and shopping centers), school context (all those kids and programs), and crowded daytime facilities, public usage can be projected to be lower than similar independent facilities. There are also several problems cited around governance and management issues. The school district boundaries and city or village boundaries are often not contiguous, raising questions about who are acceptable clients and funding sources. Ill-defined areas of responsibility make performance assessment difficult. With different boards and employers, salary and work schedule expectations can vary significantly for what appear to be similar roles and responsibilities. Security problems concern parents and teachers when adults and children intermingle in school facilities.

PREDICTING SUCCESS

Predictors of success have been identified in the work of the primary researchers and writers in this area. These have not been limited to a single site or a single set of circumstances. The criteria provided here represent a synthesis, and in some cases an expansion, of the work of national researchers and assessors: Shirley Aaron (1978a, 1978b, 1978c, 1980, 1981; Aaron & Smith, 1977), who studied combined services in Canada and the United States; Larry Amey (1974, 1976, 1979, 1987, 1989; Amey & Smith, 1976), who has evaluated school-housed public libraries in Canada and Australia; Alan Bundy (1998, 1999, 2002a, 2002b, 2003), who has assessed joint use facilities in Australia and New Zealand; and Wilma Woolard (1977, 1978, 1980a, 1980b), who examined combined school-public libraries in the United States. In addition, the following writers reviewed developments in individual states: Jim Dwyer (1987, 1989a, 1989b) in South Australia; Allen Grunau (1965) in Kansas; and Lawrence Jaffe (1982) in Pennsylvania. There have also been many studies of single operations, including those by Patricia Bauer (1995), Daniel Heinold (1993), Sally Kinsey and Sharon Honig-Bear (1994), and James Kitchens (1974). Many researchers and writers have summarized and synthesized the literature, leading to predictors

of success, including George Burns (1988), Marianne K. Cassell (1985), Shirley Fitzgibbons (1999, 2000, 2001), Ken Haycock (1974, 1975, 1979, 1989, 1990a, 1990b, 1990c, 1994), Jay Heath (1997), Don Sager (1999), and Jack Stack (1997).

Specific factors have been identified as important for potential success. These might be considered predictors, based on research and evaluation studies involving hundreds of combined school and public libraries. Could there be exceptions? Of course. However, any agency would be foolish not to consider these criteria and systematically address each one, whether that means implementing it or planning to overcome it.

Criteria for Potential Success

The following ten criteria appear consistently and continually in studies that investigate and assess the quality of services in dual use libraries. As stated earlier, given the many problems and possible disadvantages inherent in combined school and public libraries, the joint use community library needs to provide demonstrably equal or better than equal service than two independent services operating in the same budgetary framework.

In order to provide a solid basis for success, a community will need to commit to the principles listed below. These are unique to dual use libraries. They do not include the necessary professional elements also common to separate facilities and services, such as form-follows-function design principles; effective management of people, resources, and services; customer service factors; and outreach. The ten criteria are as follows:

1. The population of the community to be served is less than 10,000.
2. A formal planning process involving the significant stakeholders will be undertaken. Community involvement and support will be evident.
3. There will be a written legal agreement for governance, administration, finances, and operations. Guidelines for evaluation and dissolution will be included.
4. A single, independent, representative decision-making board or management committee will develop policies and procedures and engage and evaluate the director.
5. An integrated facility (not two libraries sharing one facility) is preferred; the facility will be conveniently and visibly located and large enough to accommodate a variety of groups and resources. A separate area for adults and designated parking will be provided.
6. The library will be connected with a larger network, regional system, or consortium.
7. The principal of the school should have a strong desire for success, and teachers should support the concept; support for the integrated service will be a specific factor in hiring and transfer decisions.
8. One highly motivated professional librarian will be in charge and report to a single governance board.

9. There will be regular discussion of effective communication at all levels and planned cooperation between public library staff and school staff.
10. There will be no restrictions on access to print, audio/video, or electronic resources or on the circulation of materials.

Predictors of Success

The population of the community to be served is less than 10,000 While the numbers vary, most researchers find that successful operations exist in smaller communities. Woolard, for example, suggests communities under 10,000. Heath found most successful dual libraries in communities under 5,000. Bundy suggested 3,500, while Dwyer found success in communities of fewer than 3,000. Aaron, in testing Woolard's findings, located a few combinations that appeared successful in serving a catchment area beyond 10,000, but the other criteria noted here still applied.

In isolated rural areas where finances are a problem, combined facilities may be the only alternative for any type of library service. Indeed, the work of Amey, Bundy, and Dwyer, focusing on the state of South Australia, not only identifies benefits but also criteria for assessment. Further, in recognition of both the challenges and opportunities, the state has provided consultative assistance specifically for communities engaging in planning and developing these "community-based" libraries.

A formal planning process involving the significant stakeholders will be undertaken. Community involvement and support will be evident Successful ventures begin with an inclusive planning process that places library services formally in a comprehensive community services context. Needs assessments will be undertaken and profiles developed. Joint planning and role setting is complex and complicated work. So, who is in charge? What are the responsibilities of the committee? Who will fund planning activities? Who will contribute what? Who will plan and oversee facility design? Issues need to be identified and roles and responsibilities articulated. Ground rules should ensure that adequate time and funds are provided for planning, that all issues are placed on the table, that all choices and options are pursued. Many communities have found that initial enthusiasm for a combined library waned when faced with both insurmountable challenges and reasonable alternatives.

The process of formal planning should result in a shared vision for the service with common goals, recognizing the duality of function, and the adoption of preliminary policies and procedures. Given that there is little evidence of savings in operational costs, the planning team will want to consider key success factors for the combined library. Everyone should be clear about why they are pursuing this avenue and what will be required to make it work. As with any strategic planning process, an environmental scan will be useful, including the strengths and weaknesses of the cur-

rent system and the opportunities and threats in the community at large. Strategic directions and comprehensive planning must ensure community involvement and support as a foundation for a successful venture.

There will be a written legal agreement for governance, administration, finances, and operations. Guidelines for evaluation and dissolution will be included Contractual arrangements will cover roles and responsibilities of each party; management; security issues; hours of operation; ownership of the site, facility, furnishings, equipment, and materials; staffing; collection development and management (policies on selection of materials, appropriate use of technology, access to the collection, multiple copies for the curriculum vs. a balanced collection); library technical services (combined ordering and common organizational principles); user rights and responsibilities; circulation periods and extended use fees (fines); how services will be provided; responsibility for facility operations; financial responsibilities and obligations; sources and uses of funding; objective criteria for expected performance levels; procedures for evaluation, with regular monitoring and assessment, including benchmarking against standards; and reports for specified audiences on a regularly scheduled basis.

Clearly the school superintendent or designate and library director or designate as well as the board chairs will need to be involved in the development of such an agreement. This legal contract will include provisions for termination with criteria for dissolution and the distribution of assets.

A single, independent, representative decision-making board or management committee will develop policies and procedures and engage and evaluate the director Roles and responsibilities, and reporting structures, are essential to a successful operation. To whom does the director report? For effective public library services it will not be to the school principal. Neither can it be to a remote board dealing with all libraries or schools; the demands and issues are unique. The director will have different responsibilities and expectations and should work with a separate board, or committee with authority, that will, nevertheless, still operate within the overall framework of state legislation and larger systems. The exact form of administration, the nature of the governing board, and the need for a citizen advisory committee are less clear from the research.

An integrated facility (not two libraries sharing one facility) is preferred; the facility will be conveniently and visibly located and large enough to accommodate a variety of groups and resources. A separate area for adults and designated parking will be provided An integrated facility in this context means that the service does not simply comprise two libraries sharing one facility. It will be open to all during all open hours, with separate entrances for the community and the school, comprising exterior public access and interior school access. There will be a street presence.

There are many different models of two libraries sharing one facility. Target groups might be by level (elementary or secondary school) or by

focus (children only, teens only, entire community). Models for facilities include a secondary school library on one level and the public library on another, separated by a flight of stairs (used primarily by staff); a single facility with a shared collection but different entrances, user space, and administrative services; completely separate hours with, for example, school use from 8 to 3 and public access from 3 to 9 and weekends; in the school; connected to the school; independently sited on the school grounds. These issues will be determined by local interests and conditions.

Access at grade level for the community, proximity to classrooms, and external access to a meeting room have all proven useful. However, when one increases access for adults to schools, security concerns for children increase and must be addressed.

Secure and restricted parking for adults will be necessary. Few schools, especially secondary schools, have sufficient parking for teachers and students. Customers unable to find parking near the entrance will not return.

A public library located in a school, by whatever name, will have more young people in it, whether engaged in productive use or not, than one that is not. Some adults find this intimidating or at least overwhelming. A separate area for adults, with comfortable furniture and current newspapers and magazines, can re-create the oasis that the public library represents for many community members. A well-planned and well-designed marketing plan and public awareness strategy will be necessary to encourage public use of the building.

The library will be connected with a larger network, regional system, or consortium No library can operate on its own any longer. Regional systems, federations, networks, and multitype consortia are all more common as resources and systems become more sophisticated. A larger system can provide professional advice and support, professional development and training, access to programs and resources, and improved electronic capacity. A combined library board and staff should view connections with systems as an important investment of time and money.

The school principal should have a strong desire for success, and teachers should support the concept; support for the integrated service will be a specific factor in hiring and transfer decisions The principal's commitment is a critical factor. It is often present at the beginning but not considered in administrative transfers and assignments. The initial level of commitment needs to be maintained as personnel changes. Similarly, the principal will encourage teacher support and use over time.

One highly motivated professional librarian will be in charge and report to a single governance board A significant advantage to combined services in smaller communities is the ability to engage a professional librarian. Working with both the school and the public library components, however, will challenge even the best trained and experienced director. The challenges

and disadvantages are well-known, the common problems readily identifiable, and barriers to success well documented. The single professional, or director of staff, will ideally be certified as both a school and public librarian; will be flexible, adaptable, and committed to the success of the operation; and will be able to translate that enthusiasm and commitment as a skilled networker into effective advocacy and marketing programs.

There will be regular discussion of effective communication at all levels and planned cooperation between public library staff and school staff Communication through meetings needs to be frequent and regularly scheduled. Site staff need both pressure and support to collaborate, or it will not happen in a busy work environment.

Consistent with the operating agreement, annual evaluations will be conducted against identified key success factors and benchmarked libraries. Annual reports will include connections between strategic plans, goals and measurable results, statistics on users and use, and recommendations for improvement.

There will be no restrictions on access to print, audio/video, or electronic resources or the circulation of materials The management board will have policies on the selection of materials and the appropriate use of technology, recognizing the library's commitment to intellectual freedom as a marketplace of information and ideas. In order to leverage the expanded collection it is preferable that all materials be shelved together, with no restrictions on borrowing. Reading guidance and student assistance will be more important than restrictions on rights to read, listen, and view materials. Clearly specified and well-understood options to Internet filtering will also be required, at worst providing opportunities for disabling filters when necessary for students.

Most single "success" stories, even as descriptive reports, appear to meet these research-based criteria.

TRENDS AND ISSUES

In spite of the rhetoric around dual use libraries, including some professional association policy statements, there is a sufficient research base to enable considered and effective analysis and planning. Researchers have developed checklists for feasibility studies (see, for example, Aaron, 1980) as have state agencies. Readers would do well to consult those of the California State Library (2000), the Minnesota Department of Children, Families, and Learning (2000), the Ohio State Library (1996), and the Wisconsin State Department of Public Instruction (1998), among others.

These guidelines and checklists need to be adapted to focus on community development roles for school and public libraries and options for co-location of public and academic libraries and school and community college libraries. There is an increasing number of examples of opportunities for public and private agencies to work together for better library and

information service provision, and the research into combined school and public library facilities and services can inform this development.

There are also ample studies and resource lists of cooperative endeavors (Haycock, 1989) but fewer studies exist on true collaborative efforts between school districts and public libraries. Douglas (1990) provides the elements of one of the few formal policy statements of mutual expectations between a public library system and a school system. Within this framework greater collaboration can occur. One might look to current areas of service that could be enhanced by interagency collaboration between two equal partners. An increasing number of public library systems are providing homework centers, for example, as an identifiable service to clients. Few have constructed these services through joint problem identification, analysis, and solving with the school district, however. The difference could be striking, moving from a drop-in service operated by well-meaning laypeople, to the same space and staffing as the public library but appropriate resources and training provided by the school system, with referral of students in need and tracking of results.

This same level of collaboration might be applied to early and family literacy programs, too often operated with "mindful ignorance" of the work of other agencies. Other recent examples include career counseling and job information and reference services, intergenerational programs, support for immigrant families, and information technology training. Common Web sites and efforts for young people could have greater effect.

Libraries of all types have moved beyond four walls in providing access to resources, and some are now looking more at formal partnerships that enable programming by other agencies on a regular basis in their physical space. Early literacy programs by community agencies might be regularly scheduled in public library space as a co-sponsored program.

Electronic and technological advances, together with increased focus on community development and outcome-based assessment, have led to more statewide licenses for access to specialized databases for all residents, including schools. This has led to school representatives at the tables of consortia. It would be unfortunate if the opportunities presented by conversations among a wider variety of information professionals did not lead to improved collaboration for the benefit of our communities, whether dual use physical space was a component or not.

The research on dual use school/public community libraries points to critical factors that can predict success. The supporting documentation, checklists, and guidelines can also inform dual purpose library projects based on collaboration between public and private agencies. If one were to view cooperative efforts on a continuum from courtesy to cooperation to collaboration to co-location, our efforts are more commonly providing services through informal cooperation and courtesy or full co-location. The potential exists through collaboration for improved community services

with a focus on outcomes and impact. Collaborative efforts enable us to leverage our resources for greater effect and see possibilities that may include co-location after full exploration of all of the alternatives and options.

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Libraries Like No Others: Evaluating the Performance and Progress of Joint Use Libraries

ALAN BUNDY AND LARRY AMEY

ABSTRACT

The published and research literature on joint use libraries relates mostly to school community libraries, which are normally combinations of high school and public libraries. That literature often still emphasizes the susceptibility of joint use libraries to dysfunctionality or even failures, although the record of successful combinations is improving because of informed planning and consideration of the requirements for success. Evaluation of joint use library performance and progress is one requirement that is still given little attention in planning and formal agreements. The uniqueness of most joint use libraries also militates against general evaluation criteria and benchmarking. Difficulties in a joint use library, therefore, tend to be unrecognized by its institutional partners until there is a crisis.

Continuous self-evaluation and a commitment to transparent periodic external evaluation will minimize these difficulties and foster joint use library synergies. A joint use library evaluation methodology is outlined. The methodology is focused on internal ongoing formative evaluation using critical success factors. This should be complemented by external five-to-seven-year reviews commencing within three years of a library's establishment.

INTRODUCTION

Worldwide there is an increasing interest in governments at all levels in collaboration between different agencies and the most effective outcomes of taxpayer investment in them. Joint use libraries can, properly planned, implemented, and evaluated, represent an optimal example of such collaboration (Amey, 1987, pp. 52-63).

The published and research literature on joint use libraries relates mostly to school-housed public libraries, or school-community libraries. This is also reflected in the writers' definition of a joint use library, derived from several sources, as one in which two or more distinct library services providers, usually a school and a public library, serve their client groups in the same building, based on an agreement that specifies the relationship between the providers.

Joint use libraries, usually combining a public library with an educational institution library on the site of the educational institution, have existed for nearly a century (Amey 1979, pp. 1–6). During the last forty years, in particular, lessons have been learned about how to ensure their success. One of those lessons is the value of openly and adequately evaluating the performance and progress of the joint use library.

Joint use library variations now include libraries for two or more educational institutions, research institutions, government agencies, and even business corporations. Although the most common type of joint use library is the school-housed public library, a less frequent but increasing variation of the concept is the public library housed in a community college or university. Some of these libraries may involve three or more partners, for example, a combined school, college, and public library. In that sense they are more than "dual use" libraries. There are also now wide variations in the size and complexity of joint use libraries, from a very small rural primary school—housed public library serving only 200 people, to the \$177.5 million, 475,000 square feet King Library opened in 2003 and named for Dr. Martin Luther King Jr. This initiative between the city of San Jose and San Jose State University in California has been described as "A library like no other."

Since 1990 there have been other major joint university-public libraries developed in Australia, Finland, Latvia, Sweden, and the United States (Bundy, 2003, pp. 135–137). The evaluation issues and proposals raised in this article focus on school community libraries. However, they apply to all types and sizes of joint use libraries.

ADVANTAGES OF JOINT USE LIBRARIES

Experience in joint use libraries, and comparison of them with separate public and other services, suggests a number of advantages against which their evaluation should proceed. A major claimed advantage, and thus an evaluation focus, is the synergy of a joint use service—the whole being greater than the sum of the parts.

The other claimed advantages are economic, social, and educational. Never claimed, however, are the possible political and career profiling advantages to institutions and individuals initiating joint use libraries. Despite its long history, the concept is still often seen as innovative. Joint use libraries should

- represent efficient use of public money: staff costs may be shared between authorities; buildings and facilities may be provided more cost effectively; resource acquisitions may be coordinated to provide savings; operating costs will be minimized and shared;
- provide a greater quantity and higher quality of collections, services, and facilities than is possible with separate services and smaller budgets;
- provide access to more staff than in separate services;
- allow extended opening hours;
- be convenient to users in providing all services on one site;
- permit the collection in one place of archival and local history material of interest to the whole community;
- allow more flexibility in providing and obtaining resources and making innovations;
- provide access to more than one system for support services, for example, professional development;
- promote greater community interaction by providing a community focal point;
- provide greater access to information on community services;
- increase the community's awareness and understanding of current educational practice;
- promote information literacy development and lifelong learning;
- encourage the development of a positive attitude in students toward school;
- provide more avenues for promotion of library services;
- bring different community groups together on the governing board;
- provide a social justice outcome for smaller communities that could not support separate services;
- enhance social capital through increased community engagement.

PLANNING SUCCESS FACTORS

Experience has shown that the main success factors for joint use libraries are the following:

- A formal agreement endorsed by all cooperating authorities
- The agreement should include the essential items but not attempt to cover all policy issues; the agreement should provide for a mediation process and dissolution of the joint use library with at least one year's notice
- The level of service provided should be equal to, or better than, that which could be provided in separate facilities
- System-wide support is essential, for example, for staffing, professional development, and advice and financial support
- A governing board or committee should participate in the establishment of the service; it should develop ongoing broad policy for its operation and endorse goals and budget priorities

- A profile must be established for each joint use library to define the community to be served
- Provision should be made for the projected growth of the community
- Choice of site is critical; if the site is predetermined and not ideal, extra effort will be needed
- Very good signage is necessary, in the neighborhood and on-site
- Opening hours should meet the needs of the whole community
- Physical facilities should be appropriate to the community
- There should be awareness of the special needs of the community
- Staffing levels should be adequate and the composition of the staff should reflect community requirements
- Staffing and its management should be integrated where possible
- Support structures should discourage too rapid fluctuations in staffing numbers
- The library director should be a professional librarian and have freedom to manage, including having direct control of staff and budget
- The library director should be represented on the senior decision-making and policy bodies of each constituent institution
- Direct two-way communication should occur between the director and funding bodies
- Regular consultation with, and reporting to, all parties concerned should occur
- Ongoing internal, and periodic external, evaluation of the library should take place

THE IMPORTANCE OF EVALUATION

Internal and external reviews and evaluation of libraries are now common as part of quality assurance processes. Although it appears as the last of the above success factors, evaluation of joint use libraries is even more critical than it is for other types of libraries. In part this is because, as Haycock asserts, "Good management practice means constant evaluation on a formal and informal basis and from both perspectives. Too frequently, one partner, usually the school where there has been a strong programme, gains in service but public library service suffers because it is evaluated not on the basis of what should and can be, but on the basis of what was ('something is better than nothing')" (Haycock, 1979, p. 10).

Yet it is the authors' experience that very few joint use libraries are continuously evaluated because of lack of forethought, complacency about outcomes, discontinuous leadership, or lack of staff time. Nor are many subjected to any form of external review. The unfortunate consequence is that difficulties in a joint use library, the seeds for which may be sown even before it opens, can be unrecognized by the institutional partners until it is too late.

The starting point for evaluation, therefore, should be during the initial planning of the joint use library, not as an afterthought once it is operating and perhaps starting to experience tensions and difficulties. There is little reflection of this important point in the literature, one exception being in the Californian State Library's *Public and School Libraries: Issues and Options of Joint Use Facilities and Cooperative Use Agreements*:

Assessing the success of the combined library requires comparing before-and-after information. This includes cost, usage, and survey information. While still in the planning stage of creating the library, information should be assembled which can be used after the combined library is in operation. This includes circulation figures for both libraries, program attendance, library visits, and operating costs. A before-and-after community survey can tell much about the success of the operation and about if premerger assumptions were valid. (Berger, 2000, p. 17)

At least one joint use library, California's King Library, has taken this advice to heart and commenced the collection of public and university library data two years ahead of the opening of the joint library. It engaged a consultant in the late 1990s to undertake "before and after" merger studies to be completed in mid-2006. The King Library is also working with the business and psychology faculty at San Jose State University to study library staff response to working in a merged environment, the outcomes of which will be published.

There is also usually no commitment to evaluation in the formal agreements that should be reached before a joint use library is developed. It is not unknown, however, for a library to operate for several years before an agreement is signed by all partners. Yet experience shows that, if agreements are deficient in six major aspects, the development and operation of a joint use library may prove to be extremely demanding and stressful for its staff. Those aspects that should be focused on in agreements are as follows:

- Division of operating costs
- Staffing and staff development
- Information and communications technology
- The leadership and role of the governing board or committee
- Evaluation
- Meeting future space needs

Evaluation is, in one sense, the most important of these because it is the mechanism through which difficulties with the other aspects will become transparent. Ideally, then, a joint use library agreement should specify the following:

- A commitment to developing a methodology acceptable to the governing board for the continuous evaluation of the performance and progress of the library
- An external review of the library involving all stakeholders and user groups three years after it is opened

- How the funding for the review/s will be provided
- After the first external review, reviews every five to seven years

Such provision in agreements has political, operational, and symbolic outcomes in emphasizing a determination not so much to avoid dysfunctionality or failure of the library but rather to optimize its synergies and advantages. Evaluation costs, amortized over the life of a library, will always represent a good return on investment. The above assertions are made by the authors from their experience in reviewing joint use libraries already sliding into a dysfunctional state, threatening the very existence of the library because of no ongoing evaluation and because an external review had been left until too late.

It is also important that every joint use library manager identify, in the library's policy and practice documentation, the requirement for, and approach to, evaluation. Even very small libraries should do so. For example, this was provided, albeit quite basically, by the library of the first of the state of South Australia's network of fifty-six small rural school community libraries. The Pinnaroo School Community Library was opened in 1977, and its policy manual noted that its evaluation would include the following:

1. Community surveys sent out at regular intervals. Results collated by librarian for consideration by Board of Management.
2. Annual Report presented at Annual General Parents' Meeting each November. Statistics for previous year are included, and register of stock.
3. Statistics for the State's public libraries published annually.

South Australia's unique system of politically mandated school community libraries (Bundy 1997) provided an opportunity for Amey (1984) to develop and test an evaluation plan for those libraries. That plan remains the only known framework for joint use library evaluation. It has been revised and updated for this article. The approach taken by the plan is validated by the literature on education evaluation, especially by Stufflebeam and Shinkfield's seminal text, *Systematic Evaluation: A Self-Instructional Guide to Theory and Practice* (1985). This work describes and critiques various evaluation methodologies, most interestingly Stufflebeam's own improvement-oriented evaluation, in which it is contended that evaluations should foster improvement, provide accountability, and promote increased understanding of the situation under review. As he states, "The most important purpose of evaluation is not to prove but to improve . . . We cannot be sure that our goals are worthy unless we can match them to the needs of the people they are intended to serve" (p. 151). Stufflebeam's methodology emphasizes ongoing evaluation, something very congruent with Amey's joint use library evaluation plan.

The approach can be complemented by the balanced scorecard approach first proposed by Kaplan and Morton (1992) in the *Harvard*

Business Review. This concept has been successfully applied in a number of libraries. While it does not assist a library in developing strategy and goals or process improvement, it is a series of four or five indicators that tells a library how it is doing. The goal of a library's balanced scorecard is to identify a set of measures that reflect future performance, with objectives and measures chosen from its vision and strategy. No joint use library is yet using a balanced scorecard approach to evaluation, although the library literature about it is increasing (Matthews, 2002).

ISSUES IN EVALUATING JOINT USE LIBRARIES

Summative Evaluation

Evaluation tends to be either summative or formative. Summative evaluation is administered at a single point in time, often at the end of a program or when brought about by internal or external, or both, pressures. The intent of summative evaluation is to assess and make an overall judgement about the worth of a library. This approach generally emphasizes comparison. In the case of a conventional school or public library, a comparison of the library being evaluated is made against quantitative and increasingly qualitative standards established by the relevant professional association. Inputs, such as the number of volumes in the collection or the physical space available, are checked to see if they conform to the required standard.

Standards and Joint Use Libraries

Standards for joint use libraries do not exist. The uniqueness of most joint use situations militates against the creation of standards and general evaluation criteria for them. Variation among joint use libraries in such fundamental areas as clientele, siting, size, staffing, administration, and funding make the application of a single set of evaluative criteria extremely unlikely. By their nature, joint use libraries are often innovative in development and individual in their response to a particular situation. Therefore, they also resist meaningful benchmarking against other libraries.

Attempts have been made to resolve this dilemma by cutting the joint use library in two and making separate comparisons against established quantitative and qualitative standards for school libraries and for public libraries. Although this approach has merit, it is not sufficient in itself, for it overlooks the synergistic achievements that should grow out of the corporate nature of a joint use library.

In addition to issues resulting from the lack of joint use standards, there are other weaknesses in conventional evaluation. The few in-depth evaluations of joint use libraries reported in the literature seem to have been costly in terms of time and staff involvement. They have almost invariably been single efforts, carried out once and never repeated. Without periodic

repetition and complementary ongoing evaluation, therefore, they have been of limited practical use in the overall development and improvement of the library.

Formative Evaluation

Formative evaluation is an ongoing process. It occurs during the activity and is intended to guide decision making and to shape the improvement and future of the library being evaluated. This dynamic approach examines the inputs and outputs, components, and achievements of the library. It also looks at the processes involved and the total program of the library. It attempts to examine the library's activities and the relationships between these activities and the population served. This is done on a more or less continuous basis and provides a diagnostic approach to a library's development.

There are problems with all methods of evaluation, not the least of which has to do with the availability of time, staff, and funds to support the process. However, certain characteristics should be present in any plan of assessment for joint use libraries.

What Is Required

The following are necessary for a joint use library assessment plan:

- *Continuity*: Rather than one-time or infrequent evaluation, a method that provides an ongoing assessment of the performance and progress of the library should be used. Such an approach will serve as a planning instrument capable of providing goals and objectives with which to guide library development.
- *Versatility*: Joint use libraries are often specific in their response to a situation. An assessment plan must therefore acknowledge the social, political, and economic situation in which the joint use library is operating. Such an approach should allow a meaningful assessment in a way that is not possible by a simple comparison with a general set or sets of standards.
- *Flexibility*: It is also necessary that any evaluative approach is adaptable enough for use with different types of joint use facilities, ranging from a library staffed by many professionals and situated in a large, multipurpose community center, to a small library managed by one professional in a rural school.
- *Practicability*: An evaluative process must be practical and feasible. Libraries have finite resources. The time, staffing, and economic commitment required for the kind of evaluation sometimes envisioned by researchers may simply not be available.

A well-facilitated, full-scale evaluation, involving user and nonuser surveys, determination of user preferences and perceptions of services, use patterns, program and circulation statistics, collection assessment, development of joint use input and output measures, and other types of

analysis, is always a valuable investment. However, the small size, low staffing numbers, level of supervision, and location of many joint use libraries may not allow for such an evaluation program. This is particularly true if evaluation is not provided for in the formal agreement.

A PLAN FOR ASSESSING JOINT USE LIBRARIES

Summary

The assessment plan should proceed in steps.

- *Goals:* At the outset, those areas of the library's operation on which most attention needs to be focused are made explicit. The result is a conscious listing of the library's most important goals.
- *Critical Success Factors:* The next step is to identify those factors most critical to the attainment of the library's goals, the critical success factors (CSFs). These are the things that must be done well for the library to succeed.
- *Action Plan:* Following this, a list is compiled of strategies to be undertaken in support of the critical success factors. This is the action plan.
- *Measures of Success:* It is then necessary to assess the effectiveness of the actions taken. This is accomplished by the application of appropriate measures.
- *Annual Progress Report:* Finally, an annual progress report is produced to describe the library's performance and to signal the beginning of a new cycle in which new, or extended, goals, CSFs, and measures are formulated.

THE CRITICAL SUCCESS FACTORS METHOD

Sometimes an organization, such as a library, reaches a stage where it is almost self-perpetuating. It runs along from year to year without its vision, mission, and goals being reviewed or even known. The library manager and other library staff may be hard-pressed to find breathing space to step back and take a fresh look at their library.

The evaluation process presented here describes a method to raise the consciousness of library staff, and others associated with the library, about its objectives. This approach, the *Critical Success Factors (CSF) Method*, encourages a reappraisal of where the library is headed and where it can be improved. It also brings together the participants and requires them to share perceptions of the joint use library's role, objectives, and possible improvements.

Background to the Critical Success Factors Method

The CSF Method has been used successfully as a management tool by business corporations. It is a straightforward but potent means of analysis that can be used to assist a library manager to systematically isolate and

clarify those CSFs necessary for the successful operation of the library. The critical success factors are those few areas in which things must go well for the library to flourish. If the results are satisfactory in those areas, the evaluation confirms the successful performance of the library. If the results are unsatisfactory, the library's performance will be inadequate.

The CSF Method raises the consciousness of managers and focuses their attention upon the vital areas under their management. Once the library manager isolates those factors necessary for success, the evaluative procedures and reports required to monitor the library's progress can then be implemented.

A virtue of the CSF Method is its flexibility. It can be applied to joint use libraries regardless of their size, complexity, or special characteristics. The approach is practical, rather than academic or idealistic, and it need not be too technical. The analysis develops out of the social, political, and economic environment in which the joint use library is established, and it focuses on individual managers and their information needs.

Assessors: The Role of the Facilitators

The following approach may be used in different ways depending upon the size and staffing of the library. It lends itself to the accumulation of data, so that the views of managers and participants at various levels, and representing different constituencies, may be obtained. Where a school community library is large and employs a teacher-librarian, or a school media specialist, and a public librarian, an internal assessment can be carried out with the professionals determining the goals and CSFs for their primary area of responsibility. Subsequently, the teacher-librarian and the public librarian will come together and repeat the process to evolve the corporate goals, CSFs, an action plan, and success measures for the library.

A variation of this approach, more suitable for small school-community libraries in which management is handled solely by a teacher-librarian, is for the assessment process to be guided by an external facilitator or facilitators. The teacher-librarian in small school-community libraries may already be required to wear three hats, those of teacher, school librarian, and public librarian. It would be unrealistic to expect her or him to assume, as well, the role of assessor. It is also very important that the public library is properly represented in the process. This is because joint use libraries tend to fail because they do not meet the expectations of the public, not because they do not meet the needs of the educational community. Public library input may not be easily achieved in an institution so clearly sited and managed in the education domain. It is here that an outside facilitator or facilitators with knowledge of public library service can ensure a broader perspective.

The task of the facilitator(s) is to guide the process described below. In the initial stages, independent interviews would be held with the teacher-

librarian and the school principal. The librarian and the principal, in addition to being school personnel, are also members of the community, and they could be expected to reflect community interest in their analysis of the library's goals. However, the assessment process is enhanced if a community representative not employed at the school is consulted.

APPLICATION OF THE CSF METHOD

Application of the CSF Method does not require much time, and therefore it should not interfere with the normal library routine. In step 1, setting goals, the method is initially from the school library perspective, and it is then repeated from the public library viewpoint. That is, the facilitator will interview the same people twice to obtain their views on what constitute the most important goals of the school library and of the public library. The corporate goals of the school community library will be dealt with at a later stage.

Step 1: Setting Goals

The Goals of the School Library The facilitator separately interviews the teacher-librarian, the school principal, and the chairperson of the local board of management. In each case the facilitator will encourage the interviewee to identify and list the school library's most important goals for the coming year. These should be goals that are applicable, attainable, and prioritized. A hypothetical school library situation and its goals are described below.

The school library serves a K-12 school of 300 students. It is part of a joint use facility in a small rural community. The teacher-librarian is aware that many of the boys, in particular, are nonreaders or reluctant readers. They use the library infrequently, and then primarily to use the Internet or the game station, or as a place to study, with little reading or borrowing taking place. Another area of concern is the lack of involvement of the teaching staff with the information literacy development of their students, and their reluctance to embed information literacy in the curriculum. A partial list of the library's goals would include growth in students' reading interest; teacher involvement with the library; and greater awareness of the importance of information literacy development.

The Goals of the Public Library After the goals for the school library are identified, the facilitator repeats the process, asking the participants individually about what they see as the most important goals for the public library. That is, the interviewees will be encouraged to identify those goals that are most important for the library's operation as a public library. These are listed on a priority basis. A hypothetical public library situation and its goals are described below.

The teacher-librarian, manager of a joint use library in a small rural community, is concerned about the low use made of it by some community groups. There are few seniors registered as users, although demographically they are significant and increasing. The librarian has heard that seniors feel the school community library is too far away for them to reach easily; parking is a problem because of competition from teachers and students; no open hours beyond school hours are provided; and they are uncertain about their entitlement to enter the school to use the library. Another group of nonusers is farmers in the area, who have no awareness that the library has informational and recreational resources of use to them and who can only use the library after school hours, when it is currently not open. Goals for the library would include greater library awareness and use by seniors and by local farmers.

Step 2: Identifying Critical Success Factors

The CSFs are those areas in which the library must perform well in order to ensure it reaches its goals. The facilitator interviews each of the participants to obtain their perceptions of the CSFs underlying each of their goals.

The CSFs of the School Library Alongside the list of goals developed, a list is made of what each interviewee sees as the critical factors influencing the attainment of each goal for the school library (see Table 1).

Once the parallel list of goals and CSFs is completed, time is given to review it, preferably in consultation with the teachers and library assistants. Discussion can be focused on the relationship between the goals and the CSFs. On further consideration of the above, it may be possible to combine, eliminate, or restate goals and CSFs.

The CSFs of the Public Library The above procedure is repeated, with the facilitator leading each of the participants to consider those factors most relevant to the public library's success. These should be reviewed and recorded. An example of such a listing is given in Table 2.

Step 3: Establishing Corporate Goals and Critical Success Factors

This step, and those that follow, deal with overall school-community library concerns. Having considered the institution in its separate aspects, as a school library and as a public library, the participants are now asked to look at the broader corporate concerns of the joint use library. Therefore, the facilitator arranges a group session in which the teacher-librarian and the community representative work together to isolate those goals that are seen as most important for the school community library as a whole. These are listed by priority. They may repeat or resemble the lists of goals identified for the school library and the public library. It is possible, for example, that particular school or public library goals, although important in their own right, will not make the short list of the most important goals for the school community library.

Table 1. Example of School Library Goals and CSFs

Goals	Critical Success Factors
Growth in students' reading interest	Greater interest in collection Increased borrowing More use of materials in the library Requests for new materials
Teacher involvement with the library	Increased contacts with teachers
Greater awareness of the importance of information literacy	More class use of library Additional requests for materials and involvement of librarian Invitations to librarian to participate in resource-based planning, information literacy development, and curriculum meetings

Next to the list of goals is recorded what the group feels are the CSFs underlying the attainment of the goals. Once again the list is discussed and reviewed, with consultation encouraged between the parties by the facilitator, to ensure as accurate and as focused a listing as possible.

Step 4: Developing an Action Plan

At this point there should be a clear picture of the joint use library's goals and CSFs. The next step is a plan of action. Table 3 gives an example.

The formation of an action plan should draw upon the strength of the whole group, with all participants contributing ideas and suggestions on how to meet the CSFs.

Step 5: Designing Measures of Success

To assess the effectiveness of the action plan, measures of success are needed. It is sometimes only after an action plan has been carried out that

Table 2. Example of Public Library Goals and CSFs

Goals	Critical Success Factors
Greater library awareness and use by seniors	Overcoming resistance to location More inviting atmosphere Publicizing services More appealing collection More convenient hours and access Greater outreach efforts
Greater library awareness and use by local farmers	Making relevant resources and services known More convenient hours and access Greater perception of library's usefulness

Table 3. Example of a School-Community Library Action Plan

Goals	Critical Success Factors	Action plan
Growth in students' reading interests	Greater interest in the collection Increased borrowing More in-library use of materials Requests for new materials	Acquisition of more new young adult paperbacks Improved magazine and newspaper collection Book talk programs Suggestion box established, and online suggestions introduced Increased displays Survey of reading interests Students interviewed Student representatives on board of management
Greater library awareness and use by seniors	Overcoming resistance to location Inviting atmosphere Publicizing services Outreach efforts Convenient hours and access Appealing collection	Personal invitation to coffee at the library Provision of coffee-making facilities Purchase of easy chairs Installation of electronic entrance doors Reducing shelving heights for easier access Publicity in local stores, newspapers, and radio Visits with meals-on-wheels Survey of needs, interests, hours Evening hours twice a week More parking spots for library users Enrichment of large print and recorded books collections
Greater library awareness and use by local farmers	Making relevant resources and services known More convenient hours and access Greater perception of library's usefulness	Librarian speaks at Farmers Federation on library services Survey of farm families on opening hours and access Publicity in local stock journal and on radio farming programs

the challenge of how to record its success or failure is faced. The measures needed, and how they will be collected, should be decided before the action plan is implemented. In this way, measures can be tailored to provide the information required.

The most common assessment measures sought are input, process or cost efficiency, and output. There is an increasing emphasis in libraries and elsewhere on the last of these, output measures. Input measures record what the library receives from the community—the elements that make the library service possible. Examples are the number of resources in the collection, size of budget, staffing numbers, and space available. Depending upon the joint use library's individual CSF lists and action plans, some of the general input measures commonly collected by smaller libraries for central

agencies may only need to be refined to allow for an exact assessment of specific action plans. For example, if the library has included “enhancing the young adult collection” in its plan to encourage greater use of the library, general information collected on the number of paperback titles acquired and the number of magazine subscriptions might be refined to show the number of young adult paperback titles acquired and the number of young adult magazine subscriptions.

In another instance an entirely new type of input measure may have to be created. If a library takes as a goal “the support of a new English-as-a-second-language program for immigrants and refugees,” some of the measures of success might include expenditure on a new area for language instruction, costs for recording and other equipment, and investment in a foreign language acquisition and cataloging workshop for the librarian.

Further examples are given below of the hypothetical joint use library and its goals, CSFs, action plan, and measures of success. These examples serve to show the plan as it should be fully developed. In each case the measures should be keyed to the library’s action plan. The facilitator can assist in this process by describing measures that have been adapted and used in other joint use libraries.

The other type of measure increasingly attempted is an output measure—what the library gives to its community. Output measures are indicators of the services resulting from library activity, their quantity or character. Examples are program attendance, loans, and reference transactions. A more recent indicator for public libraries is contribution to the social capital of the community served, the qualitative measurement of which is still evolving. The output measures should flow directly from the library’s action plan. Again, these measures may be readily obtained by refining output data already commonly collected. For example, general statistics on registrations, loans, and program attendance are probably already collected. If, however, increased use by seniors is sought, then the above outputs might have to be modified to give registrations, loans, and attendance by age.

In other cases, new measures may be needed to describe the library’s activities and impact. An example might be where a new joint use library is established on a school or college campus in a town long served by a centrally located, but poor, public library. Despite the greatly improved space, attractiveness, resources, and hours of operation of the new library, some resistance by public library users to using the joint use library could be anticipated. If the joint use library took as one of its goals public involvement, a measure would be comparing the active membership of the former public library with the registered active borrowers from the joint use library. The measure of success would be expressed as a percentage of the public library members who had elected to become joint use library members. Other output measures related to the above situation might include information obtained by interviewing public library members about

their perceptions of the new library or an account of a social activity to attract members to it.

Meaningful output measures are not as common as input measures, and they are more difficult to determine. This is because a library's impact on learning, on the community, and on the quality of life of individuals cannot be readily quantified. Public libraries, for example, are unique as multifaceted community agencies. They endeavor to meet the needs of the entire population from "cradle to grave," and typically at least 50 percent of the population use them regularly. Nonetheless, there is a strengthening consensus, to use Matarasso's words, that "Library services need more effective and meaningful methods of monitoring, assessing and reporting on their wider value to the society" (1998, p. 45).

In recent years, therefore, considerable attention has been given to the approaches to measuring outputs and impacts of school, academic, and public libraries. These measures comprise quantitative and, more recently qualitative, outputs, such as how school libraries contribute to learning, literacy, and information literacy, and public libraries to social capital and the quality of life of individual people. Joint use libraries, in bringing complementary agencies in the community into formal partnership, clearly can make a special contribution to social capital by what Goulding describes as "promoting the types of interaction and integration which enable social networking" (2004, p. 3). Measures such as these are time consuming to assess but are particularly applicable to the suggested joint use library external review every five to seven years.

The approach described above is not the only way to evaluate a joint use library. However, as Dwyer observed, when this method was implemented in South Australia,

The local library authorities responsible for the services which have undertaken the process have reacted favourably, have set achievable goals and have committed themselves to a continuous process and regular reporting. They have an effective mechanism for documenting progress and failures and for reassessing priorities. Of paramount significance is that the library has a means of keeping in touch with its communities, to access progress in satisfying their needs and to set targets in support of meeting their changing requirements. (1987, p. 612)

The authors have also used the major elements of this evaluation methodology for over fifteen years to facilitate reviews of joint use libraries and have commenced the second round of evaluations of some of them.

CONCLUSION

Joint use libraries are indeed libraries "like no others." They require special people to lead their development and evaluation. Experience shows that, if the staff of a new joint use library are not fully engaged with the concept, and committed to its success, the library will not flourish.

It may even fail. It is for this reason that joint use library staff at all levels should be carefully selected and inducted. They need experience in time management, advocacy, marketing, organization, and diplomacy, and, most importantly, they need to have an enthusiasm for the concept of a shared library. Public librarians, for example, are sometimes troubled—for good reason—with the location of the joint use library. Public libraries are best sited in, or close to, retail and community centers. This is rarely where educational institutes are located. When a joint use library is sited in an out-of-the-way location, the public librarian will have to be energetic and innovative in developing ways to attract users.

Joint use libraries are one of the most demanding, and potentially stressful, areas of professional employment. However, much of that stress can be minimized by attention to an endorsed, ordered, and transparent program of internal and external evaluation in order to

- improve performance and progress of the joint use library;
- ensure that the synergistic advantages of a joint use library—that the whole is greater than the sum of the parts—are realized as much as possible;
- identify, and draw awareness to, issues and concerns before any become critical.

The need for such an evaluation program should be explored and resolved in the early planning for a joint use library and specified in the joint use library agreement, with the following provisions:

- Ongoing formative evaluation as proposed in this article
- An external review of the library at the end of its first three years, focused on quantitative *and* qualitative output measures
- After the first three-year external review, a cycle of external reviews every five to seven years, again focused on quantitative *and* qualitative output measures

More than any other type of library, joint use libraries are vulnerable to dysfunctionality, and even to complete failure. However, there are many, and increasing, examples of joint use libraries that are very heavily used, innovative, and warming manifestations of community vision, partnership, and professional commitment to collaboration. Experience suggests that early investment in an ordered program of evaluation—together with the selection of the right staff—is the best guarantor of a durable joint use library, and one that is truly greater than the sum of its parts.

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What Makes a Joint Use Library a Community Library?

SARAH McNICOL

ABSTRACT

Although the majority of joint use libraries in educational establishments provide at least an adequate level of service for their school, college, or university users, the standard of service they provide for members of the public is more questionable in many cases. This article considers the benefits and problems of joint use libraries from the perspective of their public users, providing examples from the UK and elsewhere to demonstrate how these occur in practice. A number of success factors are identified that need to be considered if a joint use library is to be successful as a community library, perhaps the most important of these being the need to involve the local community in the development of the library from its earliest stage. Gaining the support and active involvement of the local community is crucial; only then can the true benefits of joint use libraries, as locations for intergenerational activity and lifelong learning, be realized.

INTRODUCTION

The guiding principle of joint use libraries should be that they provide a better standard of service than would otherwise be possible for all users and potential users; as Bromfield (2001) has put it, the joint use library should be “better than the sum of its parts.” However, although most joint use public-school libraries function at least adequately as school libraries and provide an obviously higher level of service than would otherwise be available for students and teachers, the level of service they provide for local communities has been called into question.

Joint use libraries have been the source of heated disagreements within local communities. The controversy caused by the development of joint use libraries at San Jose in California and Visby in Sweden has been well-documented (see, for example, Kauppila & Russell, 2003; Hansson, 2006), but there have been numerous less documented disputes, played out in the local media and council chambers, resulting from proposals to develop joint use school-public libraries. To give just one example, the planned joint use library at Portree in the Scottish Highlands is currently causing controversy; according to the local newspaper, "The inclusion of community facilities within the school—most notably the Portree public library—has proved an unpopular decision, with several community groups campaigning to retain the library within the centre of the village" (West Highland Free Press, 2004). The local community has expressed concern because the school site is not at the center of the village, where many believe the library should be located, and the local community believes the proposed plan allocates too small an area for an adequate community library. In addition, some concerns have been expressed about the security and safety issues of allowing public access to the school site (West Highland Free Press, 2004).

Nevertheless, it can be argued that one of the main strengths of joint use libraries is their strong community emphasis. For example, they can act as sites for intergenerational activities; actively demonstrate the concept of lifelong learning; and provide information, educational, and cultural opportunities that would not otherwise exist in communities. In the 1960s White (1963) identified the following as some of the benefits of joint use libraries: longer hours of operation, better use of the building, and a closer relationship between parents and librarians. Most of the librarians working in joint use libraries surveyed by Jaffe in the early 1980s noted the special contribution these libraries made to their communities (in Fitzgibbons, 2000). The advantages of joint use libraries identified by Bundy in his survey of the literature include the following:

- Promoting greater community interaction by providing a community focal point
- Promoting greater access to information on community services
- Increasing the community's awareness and understanding of current education practice
- Promoting lifelong learning
- Bringing different community groups together on the governing board
- Providing a social justice outcome for smaller communities that could not support separate services (Bundy, 2002)

Joint use libraries, therefore, have the potential to bring a number of both immediate and longer-term benefits to local communities.

JOINT USE LIBRARIES AND PUBLIC POLICY

The principle of joint use facilities has been advocated over a number of years by policymakers in various countries. As Bundy points out, "The pressure for public schools to demonstrate accountability through community access to underused school facilities has undoubtedly been one reason for proposals for joint-use libraries in several countries" (Bundy, 2002, p. 6). In Australia, Dwyer observed a trend to involve the community in schools in the 1970s; joint use libraries were, therefore, "an educationally fashionable thing to encourage" at this time (Bundy, 1998, p. 6). There has been particular support for joint use facilities in South Australia, where in 1974 a politically mandated decision was made that the only way to bring public library services rapidly to small rural populations was to do so on the back of federally funded school libraries (Bundy, 1998). In the United States, Aaron claimed that renewed interest in joint use libraries in Florida in the 1990s was, in part, a result of the "one-stop school" concept advocated by Governor Lawton Chiles, who supported the centralization of community services on the school site (Aaron & Hannigan, 1980).

In the UK, as early as 1970, local educational authorities were being encouraged to provide facilities within schools and colleges that could be used by the local community. Although joint use libraries were not explicitly advocated at this time, at least attention was drawn to the possibility of combined libraries (Jones, 1977). More than thirty years later, the potential community role of joint public and school libraries was highlighted in a number of UK government policy initiatives. It is, perhaps, for this reason that the number of joint use libraries in the UK appears to have increased significantly over the last five years. They are seen as a politically attractive option in response to current New Labour policy initiatives. For example, in the last few years there has been increased pressure on schools to become more heavily involved with their local communities through the introduction of extended schools,¹ which provide a range of services and activities for the community, such as adult education classes, childcare, and information and communication technology (ICT) facilities. At the same time, there has been a tendency to site public libraries with other community services, in particular, through the creation of "one-stop shops" and "library learning centers." In 2000 *Empowering the Learning Community* recommended that public and educational libraries establish cooperative arrangements in order to improve services locally (LIC, 2000). Two years later, the Audit Commission report, *Building Better Library Services*, identified "making better use of joint-use facilities" as an action for councils and library services (Audit Commission, 2002). These developments suggest that the potential role for joint use libraries could be explored further. *Start with the Child* (CILIP, 2002) recently confirmed that joint use libraries are still being established, largely due to emphasis on Best Value² and the need to

provide libraries in a wider range of locations. They are usually established because they are believed to be the most effective form of provision to meet the needs of a locality and serve small communities.

BENEFITS OF JOINT USE LIBRARIES FOR COMMUNITIES

Joint use libraries offer a number of advantages for communities; amongst the most important are the following:

- Improved facilities: better local facilities, or possibly the provision of a library where none would be available otherwise; a new, purpose-built library providing modern facilities and a pleasant environment; and longer hours of operation than other small branch libraries
- Convenience: opportunities to use the library when people are visiting the school for other purposes, for example, to collect children or to attend courses
- Lifelong learning: opportunities for all members of the community to participate in formal and informal learning
- Intergenerational interaction: opportunities for interaction between all sections of the community, in particular between adults and young people

These benefits are described in greater detail below with illustrations demonstrating how they can be transferred to practice.

Improved Facilities

In many cases, having a joint use library means that a library is provided where none would otherwise exist. The only feasible alternative for many communities is a mobile service that visits, perhaps, once a fortnight. Having a joint use library means that a higher proportion of the local population has regular access to a static library service point close to their home. A joint use library offers a better environment, more resources, and longer opening hours than a mobile service.

Joint use libraries are often open for longer hours than other small branch libraries,³ and they encourage greater use of school buildings beyond the school day, something the UK government is keen to promote. In a survey carried out in the UK in 2003, most joint use libraries opened for a time after school to allow use by the public in the early evening, and a number also had a "late night" when they remained open until around 7:30 p.m. They also allowed access during school holidays and, in some cases, on Saturday mornings (McNicol, 2003). The Audit Commission acknowledged that joint use buildings shared with other services were one way in which public libraries could not only increase hours of operation but also raise awareness and promote the library as a focus for community activity (Audit Commission, 2002).

Many joint use libraries are housed in new, purpose-built facilities, well-suited for newer services such as ICT, which libraries now need to offer. New

buildings are needed in many communities. The Audit Commission criticized older libraries for their intimidating atmosphere and layout: “official looking” facades, imposing issue desks, formal layouts, and uncomfortable furniture (Audit Commission, 2002). The *New Library Impact Study* found that partnerships between libraries and other services could “work together to add value and achieve strategic aims for the authorities concerned” (Bryson, Usherwood, & Proctor, 2003, p. 6). Joining with educational establishments can also open up new sources of funding for new builds or refurbishments that would not otherwise be available to public libraries, for example, funding from the UK Department of Education and Skills or private finance initiatives.

Joint use libraries can also make additional facilities available within the community; this can be particularly important in more isolated areas. For example, Callington Library in Cornwall sells stamps, greetings cards, bus passes, books, and plants. These types of value-added services would obviously not be available if the town were only served by a mobile library. Furthermore, school book fairs are open to the public as well as the school, which is important as there is no bookshop in this small rural town. Like many joint use libraries, Callington is involved in local cultural events; the school acts as a venue for book festivals and author visits (Evidence Base, 2004).

Convenience

In some instances, adults may be more likely to use a joint use library than they would be if they had to make a separate journey to a public library; they can visit when they are at the school for another purpose, for example, to collect children, use shared leisure facilities, or attend adult education courses. This means that library membership and issues may increase and new users are encouraged. In schools that make greater efforts to engage with the local community, people will have more reason to be visiting the school site for another purpose, thereby providing the library with “passing trade.” In the UK the extended school concept is important in this respect as it means that a number of important community facilities are offered from the school site. At Bishops Park College in Essex, a new school that “epitomises the ‘extended schools’ ethos,” the public library service is relocating its local branch to the new community wing. As well as the library, this will include a cyber café, refreshment facilities, health visitors, social services, a credit union, an early years initiative, a nursery, and an older people’s day center (Baker, 2005).

Lifelong Learning

Observing adults using the library for learning activities can help young people to realize that learning is not something that occurs only in school, but it can take place outside formal education and continue throughout life. Cassell (1985) viewed one of the advantages of a joint use library as the development of a community focal point where adults and children

can learn together. Many joint use libraries have developed strong family learning programs. The same benefit has been argued to be true of joint university-public libraries. Referring to such developments in Sweden, Gomez argued that "In a world characterised by life-long learning the combined library resources should give citizens, students and researchers a high-quality service" (Gomez, Hulthen, & Drehmer, 1998, 22). More specifically, Bundy refers to Senn Breivik's claim that a joint use library can offer opportunities for a whole community approach to information literacy development; such opportunities are likely to be increasingly important as public libraries focus more attention on their information literacy role. As Bundy points out, however, the full potential of this has not yet been investigated (Bundy, 2002). A related benefit of joint use libraries is that they can promote a greater understanding of current educational practice within the community.

Many joint use libraries participate in national lifelong learning initiatives. In the UK, for example, many act as learndirect centers.⁴ This allows access to a range of online courses and support. For isolated communities the library may be the only location where such an opportunity is available. This allows people to study a range of subjects, including languages, ICT, and business and life skills, and gain qualifications such as the European Computer Driving Licence (ECDL), Institute of Leadership and Management qualifications, and CLAIT. Callington Library in Cornwall works with the University of the First Age⁵ to organize not only school but also community Super Learning Days. Approximately 170 people attended such an event in February 2004, completing activity sheets and entering competitions (Anique Skinner, personal communication, May 12, 2005).

Intergenerational Interaction

As a library that has a significant proportion of younger people as its core users in addition to older, more traditional library users, a joint use library has tremendous potential to encourage interaction and improve relations between different generations. A number of library managers quoted in McNicol (2003) referred to good community interaction, which was frequently evident in a joint use library; it helped to maintain contact between older and younger members of the community. Activities such as Christmas concerts and book festivals brought the school and local community together. The atmosphere the library fostered was described as "buzzing" by one library manager; another referred to the "stimulating learning environment and 'can do' ethos." In one library the employment of relief library assistants drawn from the local community was seen as one way to get local people of all ages more actively involved in the work of the library. The library could also act as "a showcase for the school," encouraging the community to become more involved in, or simply more aware of, various aspects of school life. This might be through displays of pupils'

work or simply by increased contact between pupils and local residents. One library manager pointed out the benefits of the public seeing “children doing something positive and ‘educational.’” Conversely, pupils gained from seeing the library being used well and valued by adults.

Although these examples give a flavor of the types of intergenerational activities that take place in joint use libraries, a more systematic approach is needed to ensure that their potential in this area is fully developed. For example, joint use libraries could offer ideal locations for reminiscence work or for local history projects.

DISADVANTAGES OF JOINT USE LIBRARIES FOR LOCAL COMMUNITIES

Although joint use libraries have a number of advantages, they also bring their own difficulties. The most common include the following:

- Differences in ethos: joint use libraries can have a tendency to be too school-focused and fail to serve the broader social, cultural, and learning needs of the local community
- Accessibility: transport difficulties and limited opening times can be barriers to library use by the local community
- Reluctance to enter a school: in addition to practical barriers, some members of the local community may be reluctant to enter a school because they have bad memories of their own schooldays or because they are put off by the prospect of sharing the facility with a large number of teenagers
- Location: secondary schools in particular are often not located close to other community facilities
- Size of the building and collection: in many joint use libraries, both the building and collection are too small to adequately serve the needs of all potential users

Each of these issues is described in greater detail below.

Differences in Ethos

Tension is often evident in joint use libraries as they attempt to serve two quite diverse communities of users: the general public as well as pupils and teachers. Trying to meet the needs of all users, and potential users, effectively is one of the main challenges facing staff. The differences in ethos between public and school libraries—one being focused primarily on study and the other having a wider remit and placing greater emphasis on recreational reading and information use—can be difficult to reconcile. One common example is the practice of insisting that students use the library for “study purposes” at least during the school day; while this supports the aims of the school, it can conflict with the public library’s

efforts to encourage reading for pleasure and promote wider cultural and recreational activities.

There is a danger that the joint use library can come to feel like a classroom if there are regular classes using the library. The teaching and learning styles used need to be suited to the library environment. Independent and resource-based learning obviously work well, but “chalk and talk” instruction is less appropriate. A library that feels like a classroom is a far cry from the more welcoming “bookshop feel” that almost all UK public libraries now aim to replicate.

The collections themselves in a joint use library can also be too school-focused and not sufficiently diverse or balanced to meet the needs of the local community. How the stock is arranged can also have an impact. Although in most UK joint use libraries the school and public stock is intershelfed, at Haywood City Learning Centre in Stoke-on-Trent, until recently, the public and school resources were separated. This meant that half of the library, the “school side,” was seen as a “no go area” by members of the public (Janet Thursfield, personal communication, May 4, 2005).

Accessibility

The majority of joint use libraries are attached to, or part of, a school, most often a secondary school. It is generally acknowledged that being attached to a school is beneficial in terms of encouraging pupils to use the library, but it is not so ideal for members of the public. They might experience a number of practical problems, for example, school buses that collect children after school blocking access to the library or parking problems. At Sneyd Community Library in Walsall in the West Midlands, for example, it is not easy for members of the public to access the library as they have to enter through the main school entrance. There is a lack of signage to the library both outside the school and when potential users enter the building. This means that many members of the public think it is a resource for the school alone. The location presents further problems in this respect; there is no regular bus service, so travelling to the library is difficult for users without their own means of transportation (McNicol, 2003). This is a widespread problem as public transport links to schools may be poor except at the beginning and end of the school day.

Limited opening hours can be a further problem. Although overall opening hours of joint use libraries are generally good compared to school libraries or small branches, there may be times when the library is closed to the public to allow classes to use the facilities. In some cases, opening hours are less than those of comparable libraries serving a single user group. For example, Lichfield Library in Staffordshire, which is a joint public, university, and further education library, opens the same hours as other branches in the county but less than would be expected for other university libraries (McNicol, 2004a).

Yet another issue is security. Security in schools has become much tighter over the last decade, and visitors are asked to sign in and display a badge indicating they have a bona fide reason for being at the school. However, if a joint use library is sited in school grounds, or in some cases within the school, this can cause difficulties. Excessively bureaucratic or officious procedures are off-putting for public library users and are likely to deter the very people public libraries are working so hard to attract.

Reluctance to Enter a School

Although the familiar environment of a library on school premises might encourage greater use by pupils, this presents a barrier for some members of the public. A widespread problem is the fact that some members of the public, particularly older users and parents with toddlers, feel intimidated entering a library where there may be large number of teenagers. Breaks and lunchtimes, when pupils use the library without teacher supervision, can be especially off-putting for some public library users. Even getting to the library entrance can be an ordeal if it means passing through large, unsupervised groups of teenagers; many joint use libraries do not have separate entrances. Library staff sometimes have to work hard to maintain good relations between the school and the public library users.

Although joint use libraries have been popular in Norway for a number of years, in 2004 it was clear that, at least in the South Trøndelag area, many joint use libraries (or *kombinasjonsbibliotek*) that had been established in the past were no longer meeting the needs of the local community. The main problem mentioned was the fact that adults, especially older people, did not generally like to visit a school because of unhappy associations with their own schooling or a fear of disruptive students (McNicol, 2004b). The former point is one that has been well-researched in relation to both educational establishments and libraries generally (Hull, 2000), but it perhaps needs to be more explicitly stated that the findings of these studies have particular significance for joint use libraries due to their location and, in some cases, their ethos. The latter points to a lack of understanding between some schools and the communities where they are located. Where there was a greater sense of community within the area, Norwegian joint use libraries seemed to stand a higher chance of success (McNicol, 2004b).

Many joint use library staff in the UK have reported that some members of the public quickly become more comfortable once they become accustomed to the atmosphere. Alternatively, those who prefer a quieter environment adapt their patterns of library use and choose to visit at other times (McNicol, 2003). However, there is a danger that some members of the public can be permanently deterred from using the library if they are wary of teenagers; while some may opt to visit other local branches, for many this is not an option, and they become nonusers of the public library service.

Location

Being located close to community services such as leisure centers, council service points, playgroups, car parks, and shopping areas can be a way to increase use of the public library; people are likely to be in the area for other reasons and might use the library at the same time. As White (1963) found, however, schools are often not located close to other community services. Although primary schools are usually situated close to the center of the communities they serve, this is rarely the case for secondary schools. In addition to the obvious geographical separation of many secondary schools from other community services, in recent years there has been a tendency for more children in the UK to attend secondary schools some distance from their homes. This might be because they live in a rural area, but it might also be due to a wish to attend a school run by a religious denomination or, increasingly, one that offers a specialization such as languages, arts, or technology.⁶ This means that the local population who would be expected to use the joint use public library may not be the same community that is served by the school, and this can create difficulties. Children from other schools may be reluctant to visit the library, and there will be fewer direct links between the school and the immediate local community.

Size of the Building and Collection

Too many joint use libraries are too small to adequately serve both the school and local community. In older libraries, this problem has been exacerbated by the introduction of ICT (Information and Communications Technology), which has demanded more and more space. Space needs may also change as a result of fluctuations in the local population, but lack of space is not just a problem that develops over time. In many instances, difficulties are apparent soon after the library opens. A desire to reduce building costs means that some newer joint use libraries have not been built to accommodate the current needs of the local population and even less consideration has been given to possible future expansion.

The fact that many joint use libraries lack separate areas for diverse, and often conflicting, activities, such as individual studying, reading, and whole class sessions, can prove problematic. Jaffe recommended that a joint use library should provide adequate space and separate areas for the school and public use (Jaffe, 1982, 100). Library staff interviewed by McNicol (2003) felt that, ideally, a joint use library would have a room for class use and a separate computer area, but this is rarely the case in practice.

SUCCESS FACTORS

There are a number of factors that need to be taken into account to ensure that a joint use library serves the local community as well as its school users. It is important that these are taken into account when decisions are being made as to the suitability of a proposed joint use library, and they

should continue to be monitored on an ongoing basis. The key factors that need to be considered are

- demographic and geographical factors;
- publicity and marketing strategies;
- public consultation exercises;
- the ethos of the partners involved;
- the location of other community facilities;
- access.

Demographic and Geographical Factors

The nature and composition of the local community helps to explain why a joint use library was established in many areas. In McNicol (2003), several library managers referred to the isolated nature of the community they served, poor transport links, and the fact that the size of the local community was not large enough to justify a branch library. Fitzgibbons (2000) claims that the size of the community is the first consideration when deciding whether a joint use library is a viable option. Woolard (1980) recommended that the optimum environment would be communities with 5,000 or fewer residents, where there are usually not enough library resources and few trained staff. Bundy suggested the lower figure of 3,500 (Bundy, 2002). Woolard (1980) noted that it is also often the case that communication is easier in small communities, and they often have a large, stable percentage of residents involved in community life. In addition, it could be argued that there is less division and wariness between the young and old members of a smaller community because people are more familiar with each other and come into contact on a more regular basis than in a larger community, where it is possible for separate groups to form that have little or no contact with each other.

Publicity

The correct marketing and promotional strategy is essential for a successful joint use library. In some cases, the library is promoted effectively within the school, but less attention is paid to publicity targeted at the local community. In addition to general public library service promotion, joint use publicity needs to make it abundantly clear that the library is not just a resource for the school but is open to, and welcomes, the entire community. This can be a difficult message to put across. Ideally, the library building should be visible from the roadside but, where this is not the case, it needs clear, prominent signage. Staff working in joint use libraries report adopting a plethora of promotional activities including open days, talks, leaflets, newspaper advertisements, attending local carnivals, talking to residents in the community, and addressing residents' group meetings (Evidence Base, 2004). However, as Haywood City Learning Centre in Stoke-on-Trent found (Janet Thursfield, personal communication, May 4, 2005) there is no guar-

antee that even if all these methods are tried the library will be successful in attracting the local community if local people do not feel themselves to have ownership of, and active involvement in, the library. Therefore, it is crucial that the local community is consulted and involved in decisions regarding joint use facilities from the outset.

Public Consultation

In order to involve communities and hopefully gain their support for joint use facilities, a well-thought-out consultation process is needed that demonstrates a genuine respect for the community's views and concerns. This can help to prevent or overcome the types of problems described in the introduction to this article. Aaron and Hannigan (1980) developed a model for helping local communities make decisions about the appropriateness of a joint use library. As Bauer (1995) points out, community fit is important, and all communities are not suitable candidates for a joint use library. The local community needs to be involved in a feasibility study. A joint use library is being planned in Upper Riccarton in Christchurch, New Zealand. Before the decision was taken to proceed with a joint facility, a detailed study of demographic information, transport patterns, and educational institutions and other facilities was carried out. There have also been a number of consultation exercises, culminating in the establishment of an "Ideas Bank" where teachers, students, and the local community can share ideas about what they would like to see in the new library (Christchurch City Libraries, 2005).

In Derby in the East Midlands, a planned joint use library serving the public and workers at a healthy living center has made significant efforts to involve the local community from the earliest stages. Although this joint use library did not involve an educational establishment, the same principles apply. A library panel has been set up that it is hoped will become a permanent body with its own constitution; a youth forum has been involved in selecting stock; a survey has been sent to all local residents and schools; and a member of the library staff works with residents' groups to ensure their views are taken into consideration (Roberts, 2005).

The approach taken in Essex, where a new joint use library has recently opened at Bishop's Park College, was to ask customers of the existing branch, which was to be closed, what could be done to enable them to make use of the new facility. Objections were anticipated, but once the decision to go ahead with a joint use library was taken, demonstrating that the council would do whatever it could to help the community to adjust became a priority (Baker, 2005). Although this is quite rare, occasionally the impetus for a new joint use library has actually been led by the local community. At Winnersh in Wokingham, the idea for a community library was suggested at a village focus group; there was demand from the local community and the idea was championed by a local councillor (McNicol, 2003).

Sometimes school pupils and the local community have been actively involved in the design of the library. At Ardnamurchan in the Scottish Highlands, for example, the community was involved in an art project to create a stained glass installation and projection in the library (McNicol, 2003). The library at The Campus at Weston-super-Mare has ceiling prints designed by pupils at the school (Kelly, 2005).

Some joint use libraries have used innovative forms of public consultation. For example, in Bolton arts-based consultation materials are being developed to engage members of the local ethnic minority community, as this group is often excluded by traditional consultation methods (Keane, 2005).

The Ethos of the Partners

A joint library needs to match the general ethos of both partners. Joint school-public facilities obviously work best in schools that see involvement with the local community as an essential aspect of their mission. In these schools, links are built up through other activities such as shared sports and ICT facilities and the involvement of students in community projects. In a school where fewer efforts are made to engage with the local community, it can be more difficult for a joint use library to establish its position in the community. It is important that the school recognizes that the library is not a classroom but has a wide-ranging social and cultural role.

As Bundy (2002) has suggested, it may be that joint public and community college libraries work better because of the maturity of the students, the design of the building, and the utility of the collection to the general public. In Norway joint use libraries appear to work slightly better in high schools, for sixteen to nineteen year olds, than in primary schools, which might place more restrictions on adult access to the school grounds. However, primary schools may have more potential as sites for joint use libraries than has yet been realized. Despite more security issues, they have a number of advantages over secondary schools, namely, no large groups of teenagers to deter more apprehensive library users; better links with the local community and local families; a more suitable location in the heart of residential areas; and less of a focus on examinations and traditional styles of studying.

Location of Other Community Facilities

Another factor that can improve links between the joint use library and the local community is siting the library in a complex with other community facilities such as leisure facilities, arts venues, or shops. A number of schools with joint use libraries are now offering other community facilities. One example is Ardnamurchan school and cultural center in the Scottish Highlands, which was described as “a nucleus for the whole community” when it was opened in 2003 (Scottish Executive, 2003). The library is part of the Sunart Centre (or Arainn Shuaineirt). Facilities offered include an outdoor games area; a games hall for badminton, basketball, football,

and tennis; a fitness suite equipped with rowing, running, and exercise machines, weights, and multigym equipment; an arts venue for concerts, theatre productions, exhibitions, and films; and an adult learning center from which Lochaber College offers a range of courses, including video conferencing facilities. The idea of a community library fits well with the overall ethos of the school, which is intended as a building for the whole community (McNicol, 2003). On a larger scale, The Campus in Weston-super-Mare in Somerset includes meeting rooms, a learning center, a police post, indoor and outdoor sports facilities, and a cafeteria (Kelly, 2005).

Access

Separate entrances to a joint use library mean that members of the public no longer need to compete with groups of teenagers just to get into the library. As well as addressing the school's concerns regarding security, different entrances for students and community users can help to overcome reluctance to enter the library. Transport links are another key factor in the success of a joint use library and need to be considered as part of an initial feasibility study. Separate parking facilities are also important.

CONCLUSIONS

It is surprising, perhaps, that despite the emphasis on joined-up⁷ working and greater community cohesion to be found in many UK government initiatives, joint use libraries are rarely given serious consideration by policymakers, as has been the case in other areas of the world, such as South Australia. McNicol (2003) found that, providing people are flexible and prepared to compromise, joint use libraries can work extremely well and have the potential to be an integral part of the local community. In many areas, they enable a better standard of library service to be provided than would have been possible otherwise.

Beyond the strictly practical advantages, joint use libraries offer greater opportunities than are often realized for intergenerational activities and lifelong learning and information skills provision. Amey (quoted in Fitzgibbons, 2000) has stated: "Some of the most vibrant, most community-orientated, most enthusiastically supported libraries that I have encountered have been school-housed public libraries." This type of positive endorsement is often overlooked as more attention is paid to the well-documented practical difficulties such as space, access, and location. These are, of course, all issues that need to be seriously considered before a decision to build a new joint use library is taken. Beyond such practical concerns, however, it is essential that the local community is consulted at the initial planning stage. One of the success factors identified by Fitzgibbons was "a community vision and attitude of commitment to shared services." She argues that "The total community needs to be involved in making the decision, carefully weighing the pros and cons, and determining a joint vision of library needs that

can be met through shared services” (Fitzgibbons, 2000). If there is strong resistance within the local community to the idea of a joint use library, its chances of success are severely limited. The importance of gaining public support and community involvement cannot be overestimated. Where joint use libraries benefit from strong local support—for example, Ardnamurchan in the Scottish Highlands—they stand a good chance of working, but where there is limited support or local opposition—for example, Haywood Library in Stoke-on-Trent—it can be a demoralizing experience for staff struggling to make a joint use library work under these circumstances. If a joint use library is to truly be a community library, the voice of the local community needs to be heeded.

NOTES

1. An extended school is one that provides a range of activities and services, often beyond the school day, to meet the needs of pupils, their families, and the wider community. Examples of extended services include ICT facilities, adult education, study support, and community sports programs (Teachernet, 2005).
2. Best Value Performance Indicators are measures of performance set by the departments in central government (see <http://www.bvpi.gov.uk>).
3. For example, Callington joint use library in Cornwall is open until 7:00 p.m. on two evenings each week, whereas the library in the county town of Truro closes at 6:00 p.m. each day.
4. See <http://www.learnirect.co.uk>.
5. See <http://www.aoy.org.uk>.
6. See http://www.standards.dfes.gov.uk/specialistschools/what_are/?version=1.
7. For an explanation on joined-up government, see <http://archive.cabinetoffice.gov.uk/moderngov/help/faqs.htm> and National Audit Office (1999).

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Joint Use Libraries as Successful Strategic Alliances

PETE DALTON, JUDITH ELKIN, AND ANNE HANNAFORD

ABSTRACT

A joint use library provides an example of a strategic alliance between two or more stakeholders. The planning and implementation of such a venture can be a complex undertaking. This article draws on the example of the proposed joint use library and history center in Worcester in the UK, which promises to be the largest such undertaking in the UK. Some of the potential challenges that other joint use university and public libraries have faced are explored. The article argues that lessons can be learned from other sectors where the factors contributing to successful strategic alliances are well researched and documented.

INTRODUCTION

Even on a small scale, developing plans and implementing a joint use library can be an extremely complex undertaking. The challenge is even greater when the project is on a large scale with multiple partner and stakeholder demands to reconcile and where there is a dearth of existing models to draw upon. This article explores some of the key considerations of merging services in a joint use library and draws on the experience of the proposed unique development in Worcester in the UK. Reference is also made to the lessons learned from other public and university library joint use initiatives, particularly the Martin Luther King Jr. library in San Jose, California, which may be considered to have some similarities with the proposed development in Worcester in terms of scale and scope, including the fact that both involve entirely purpose-built premises.

THE VISION FOR A JOINT USE LIBRARY AND HISTORY CENTER IN WORCESTER

The proposed Worcester joint use library and history center is a complex and ambitious project involving not only the academic library of the University of Worcester, the public library service for the county of Worcestershire, and the County Archives and Archaeology Service, but also the regional Chamber of Commerce. Adjacent to the proposed new university campus, on a currently derelict site in the city center, the University of Worcester and Worcestershire County Council, working in partnership with the city, are planning to create an innovative integrated joint use library. This will be a library for the whole community, providing a bridge between the city center and the campus and a gateway to higher education for the people of the region. This fusion is likely to be the first of its kind in the United Kingdom and will "re-imagine" the role of the library in the twenty-first century as the core information provider to the community. It will embrace a wide range of integrated information and learning services, including advice and support to business, an integrated customer center dealing with public services, and an exciting archive and history center giving access to the region's rich heritage and culture through archives and archaeology. A major focus, exploiting the shared acknowledged area of excellence in both the university and county, will be a children's and young person's library.

WHY JOIN UP?

Hitt, Ireland, and Hoskinsson have identified a number of reasons why organizations may wish to merge. These include "increased market power," "overcome entry barriers," "cost of new product development," "increased diversification," and to "avoid competition" (1996, p. 222).

These are reflected in research by McNicol (2003) outlining some of the reasons why two or more libraries may wish to merge:

- Increased use of resources
- Greater numbers and a wider range of users
- Joint funding (for resources, staff, and buildings)
- Pressure on public libraries to work with a variety of other organizations, in particular to support learners
- Attract new user groups
- Make better use of staff skills

Despite the potential benefits, there are a number of potential barriers to achieving success in any organizational merger. Hitt et al. provide some examples of the possible pitfalls that partners face, including "integration difficulties," "inadequate evaluation," "large debts," "inability to achieve synergy," "too much diversification," and the facility being "too large" (1996, p. 222).

Examples of school-public library involvement in joint use developments are more prevalent and well-documented than those involving larger academic institutions such as colleges or universities. However, joint school-public library ventures tend to be on a smaller scale and, at least in the past, on a more informal basis. For example, not all smaller joint use libraries have formal service-level and partnership agreements in place, as the modes of operating have evolved over a number of years. This can mean it is left to factors such as personal relationships and informal contact to provide the “glue” to sustain the partnership or contribute to its success. In the case of larger initiatives, such as those between public and academic libraries, more formal approaches are needed to ensure the success of the venture.

Drawing on experiences from the corporate sector, where the development of organizational alliances is well researched, Faulkner outlines four key factors that facilitate the success of alliances:

- Positive attitudes between partners
- Clear organizational arrangements for the alliance
- A philosophy of organizational learning
- Congruent long-term goals (Faulkner, 1994, p. 112)

Such lessons taken from the corporate sector might apply equally well to ambitious larger-scale undertakings such as public and academic library partnerships. This article will look at these factors in relation to the planned joint use library and history center in Worcester, drawing on further examples from elsewhere.

POSITIVE PARTNER ATTITUDES

Faulkner (1994) highlighted the importance of a sensitive attitude toward national, as well as corporate, cultural differences. There are clearly many differences between the public library sector and the academic library sector, for example, the differences in remit and responsibilities. In England the government department responsible for public libraries is the Department for Culture, Media and Sport (DCMS), while academic libraries are accountable to the Higher Education Funding Council for England (HEFCE). Despite the potential for conflict arising from being accountable to different bodies, both types of libraries are being increasingly encouraged to cooperate at a national level. For example, as a result of the recommendations of the *Empowering the Learning Community* report (Library and Information Commission, 2000), the UK government set up the Empowering the Learning Community Steering Group. This is a joint initiative led by the Department for Education and Skills (DfES) and the DCMS that had as one of its principal aims to take forward the recommendations that “public and educational libraries in communities or defined geographic areas should establish co-operative arrangements to improve services to their users” (Library and Information Commission, 2000, para.

1). It could be suggested that the response from libraries to other current policy initiatives might also involve public and academic libraries working together. The *Framework for the Future* initiative in the UK (DCMS, 2003) gives public libraries a clear role to play in supporting the government's social inclusion agenda through exploring opportunities to engage potential users with their services, in particular, the "hard to reach"; at the same time, universities are coming under pressure to widen access to this same group (DFES, 2003). Since 2000 *Empowering the Learning Community* has put lifelong learning high on the national government agenda and ensured public libraries have a central role to play. One example of research commissioned in response to *Empowering the Learning Community* (McNicol et al., 2002) highlighted a number of examples of public library authorities taking action to engage further with other educational organizations, including university libraries.

Beyond the need to respond to the political agenda, in all sectors the financial imperative can be a key driver to collaborate, and this applies equally to the academic and public sectors. Palmer, writing about a joint use library initiative in Harnosand in Sweden, refers to the way that this initiative had the potential to provide added efficiency through the "joint resources of larger premises, staff, expertise, data communication, books, periodicals and other media" (Palmer, 1999). Similarly, Kaupilla and Russell (2003) illustrate how the associated economies of scale were an important benefit in the Martin Luther King Jr. Library in California, where savings were made in areas such as maintenance and security.

Faulkner (1994) also points out the importance of a strong commitment by top- and lower-level management in the partner organizations. In the joint use library development in Worcester, all the stakeholders are committed to the venture, as demonstrated through policy documents. The planned integrated library is attractive to each of the stakeholders for a number of reasons, which are described below.

The University of Worcester's vision, as highlighted in its Strategic Plan 2004–2008, is to become a high-quality university with an international reputation for excellent, inclusive education. It has a mission to be the university of choice, particularly for the people of Worcestershire, Herefordshire, and surrounding areas, a generally underfunded region with a significant mixture of urban and rural deprivation (University of Worcester, 2005). The University of Worcester is the only higher education institution in Herefordshire and Worcestershire. It has been expanding steadily for some years and is engaged in an ambitious, wide-ranging program designed to stimulate wider participation in high-quality higher education.

As part of this growth, the University of Worcester is planning to create a second campus on the site of the old Worcester Royal Infirmary, a currently derelict site, in the city center. The vision is of a high-quality, inclusive campus with landmark architecture that will be a source of pride to students,

staff, and the local community and that will make a significant contribution to the regeneration of the surrounding area. The creation of a city center campus is expected to enhance and rejuvenate the creative, cultural, and artistic life of Worcester as well as contribute to economic regeneration. The whole development will be part of the wider St. Clement's Gate: the Worcester Learning Quarter development, contributing to skills significant to development in the region.

From the point of view of the County Council, the funder of the public library service, the current library serving the center of Worcester is poorly located, is housed in an old building with inadequate access, and is too small for the needs of the community. The need for a new library has been identified in County Council plans since the late 1990s. This development provides not only a unique opportunity to integrate collections and services with the university but also to bring together all the Worcestershire historic records and archives within a new library and history center. The City Council sees the library development as being at the heart of its planning vision for regenerating that part of the city into the Worcester Learning and Cultural Quarter. It will contribute to Worcester City's vision of "making Worcester a great place to live, work and visit" (University of Worcester, 2005, p. 10). Its four key themes are a Prosperous City; a Green and Healthy City; a Safe City, and an Inclusive City.

The Hereford and Worcestershire Chamber of Commerce is seeking to develop its business intelligence library alongside the business information resources of the University of Worcester, which supports the business school, and use it as a springboard for developing a range of additional information services to support established local businesses and new start-ups. The adjacency to the university campus will facilitate a focus for business through knowledge transfer activity and research.

Other stakeholders in the wider community such as schools, the sixth form college, and further education partners see the library development as offering a rich resource for their students.

ORGANIZATIONAL ARRANGEMENTS

At both a strategic and operational level the success of a joint use library is enhanced by clear agreement on organizational arrangements and the development and use of formal partnership and service-level agreements. The following section discusses some of the topics for consideration in clarifying organizational arrangements during the planning stage.

Management

The management of a joint use library will invariably involve some degree of compromise between the partners involved in terms of how it is managed and structured. A number of different approaches to the management of joint use libraries have been identified. Rabe (2002) refers to

the example of the Almedal joint use library in Sweden, which has a single person heading the service in charge, while Palmer (1999) refers to the model used at Harnosand in Sweden, where there is shared management responsibility resulting in three library heads representing public, county, and university libraries. In the Martin Luther King Jr. Library the model has been to share the directorship of the library between two heads: the Public Library Director and the Dean of Libraries at San Jose State University (Kaupilla & Russell, 2003). In Worcester it is intended that there will not be parallel management teams but rather a more centralized approach to management.

The relationship between Worcestershire County Council and the University of Worcester has been fostered for a number of years through a quarterly liaison meeting between all the areas represented by the council's Department of Cultural Services and the related University of Worcester departments. So the language and reality of cooperation is well established, and several smaller projects have already been successfully managed, including the mounting of a permanent exhibition of wood sculpture in the University of Worcester library with the County Museums Service; the location of the County Historic Environment and Archaeology Service at the University of Worcester and the subsequent development of a new pathways in undergraduate and postgraduate programs; and a shared analysis of reference material to avoid local duplication.

The commitment of the chief executives has been essential from the start. The Chief Executive of the County Council, the Vice Chancellor of the University, and the Chief Executive of the City Council have wholeheartedly believed in the vision and have worked to ensure that the political will of the region has been behind this project. Senior officers on all sides from such diverse departments as planning, architecture, and finance have collaborated first on the outline business case and then on the successful bid under the Public Finance Initiative (PFI) bid, a UK government initiative to encourage the development of private finance in the public sector (HM Treasury, 2005). In September 2005 the DCMS and the Office of the Deputy Prime Minister (ODPM) announced the award of £36.8 million credits for the Worcester joint use library. It was the largest single allocation made in this annual round and signified national recognition of the strength and impact of the proposal.

When discussing the arrangements for a joint use library, agreement is needed on how the budget for the venture will work. Schwanz suggests there are three broad types of costs to consider: ongoing, start-up, and space costs, which refers to future growth (Schwanz, 2000, p. 479). Agreement on the allocation of all forms of costs is important to the success of a joint venture. In the case of the Martin Luther King Jr. Library, there is an elaborate cost-sharing agreement for much of the library, but budget allocations, accounting systems, and funding schemes are operated separately,

with the university concentrating on building collections for students and the public library on building collections for the community. There have been tremendous savings in maintenance and shared information technology (IT), although there have been few savings in other areas.

An added complexity some joint use libraries experience is in the diverse range of funding sources upon which the different partners can draw. For example, in the UK some joint use libraries are partly funded by private companies (Evidence Base, 2005). The Worcester project is putting together a funding mix based on PFI credits and HEFCE Strategic Development Support.

Models of Integration

Agreeing on the model for integration is important for a successful partnership. Rabe reports on a continuum of integration that can exist in joint use libraries: "What comes closest to integration is total merger, and the idea that is furthest away from it is just sharing the same premises. Somewhere in between comes the concept of coordinating—you are in the same building but you respect each other's work" (Rabe, 2002, para. 9). At Worcester the partners hope that there will be potential for further collaboration with other parts of their existing services (both campuses and branch libraries and services such as the County Museum) while essentially retaining their distinctive organizational identities.

The Martin Luther King Jr. Library has opted for a highly integrated structure where possible. For example, any library user is able to use everything on the same terms and functions. The service is based on the principle that "services would be integrated unless doing so would not make sense from a user or functional point of view" (Conaway, 2000, p. 42). For example, the circulation system and IT are fully merged, but the children's library is not, as it is seen as a purely public library function. Noncirculating collections (for example, periodicals, reference collections, and government publications) are totally merged, but circulating collections are still shelved separately, largely because the two libraries have different classification systems (the public library uses Dewey Decimal; the university uses the Library of Congress). The general collection is largely public library stock, and the research collection is largely university library stock. "Seamless" service is the goal, however (Conaway, 2000, p. 42).

In Worcester, too, the proposed model of integration is one that is completely seamless to the user. All collections will be integrated and displayed in a way that is accessible and useful to all; staff will be working within their specializations, such as children's services, curriculum materials, subject specialist enquiries, and information skills teaching from across both public and academic library backgrounds according to their capability and interest. The ambition is that, to the library user, the background employer is irrelevant and indistinguishable. The building will be organized into

“zones” according to the kind of activity going on there—for example, noisy, discursive, or quiet study—with the appropriate adjacencies and linkages. People will identify the area that serves their purpose on that particular visit, or use more than one aspect of the service within that visit. Thus, there is no concept of an “academic” or “public” area within the same building.

The Worcester development reflects a growing recognition that learners do not see themselves as users of one particular library. Research carried out at the University of Central England in 1997–98 on the People Flows Project found that almost one-third of public library users are either full-time students or lifelong learners, and over two-thirds of the users of university and college libraries and over half the users of public libraries also use other libraries (Nankivell, Foster, & Elkin, 2000). In other words, library users use libraries for many different reasons at different times of their lives; they probably have little understanding of the differences between libraries. A library of the kind envisaged in Worcester would help to break down some of the barriers and preconceptions experienced by potential library users.

Staffing

Staffing is one of the most important aspect of forming a joint use library partnership, yet it can be the biggest challenge. There are many different examples of staffing models in joint university and public libraries. For example, the Lichfield joint use library, which is a partnership between Staffordshire University, Staffordshire Libraries and Information Services, and Tamworth and Lichfield College in the UK, is predominately staffed by public library staff, with university staff only working in the library at specific key points such as induction periods for new students (McNicol, 2004).

The Martin Luther King Jr. Library encountered a limit to integration at the level of staff. Much of the professional staffing remains separate, with two employers and four unions, partly because of the significantly different staffing structures. It was felt that it was not appropriate to ask city staff to give up respected city status or university staff to give up university academic status as each have a range of different expectations and structures. For example, university librarians have faculty status as professors, have tenure, and are under pressure to publish, with promotion based on published output criteria. In contrast, public librarians have career progression through professional development, including line management responsibility. In addition, different pay scales exist between the university and public library staff.

Other joint use libraries have reported difficulties in merging staff. For example, at the Almedal library working conditions are different for university and public library staff: “university staff usually have better conditions of employment than local authority employees . . . they are difficult to harmonize” (Rabe, 2002, para. 11).

Clearly there can be differences in culture and practices between staff from different backgrounds, which can affect integration. The Martin Luther King Jr. Library found that staff priorities were different; for example, public library staff expected to spend half of their time at the service desk, whereas for university library staff it was an activity that they hoped to spend less time on.

In some cases, however, the differences between staff culture, expectations, and practice may be more perceptual than real. Research by Dalton, Mynott, Nankivell, and Reardon (2001) has found that between staff and employers working in different types of library services, perceptual, rather than practical, barriers and differences in skills are the key barrier to staff mobility between library types. In the Martin Luther King Jr. Library this was borne out to some extent in relation to the difficulties experienced in staffing arrangements for the reference service, where, "although differences between the two libraries certainly do exist, the perception that academic librarians and public librarians answer very different types of reference questions was proving to be more myth than reality" (Conaway, 2000, p. 44).

Work to develop a common understanding of the work of each service, for example, through shadowing, can be vital to developing a shared vision and to overcoming such perceptual barriers. Training can also assist in developing understanding between staff from different backgrounds. In the Lichfield library, efforts are taken to ensure that staff coming from different services are provided with the opportunity to learn about each others' customers and practices. As a result, it was found that public library staff "have little difficulty responding to students queries" (McNicol, 2004). Sharing staff training in team building, collaboration, and management was provided in the set-up phase of the Martin Luther King Jr. Library to try to overcome cultural differences between staff (Kaupilla & Russell, 2003, p. 257).

Clearly staffing in a joint use library remains a sensitive issue. A recent conference on dual use libraries in the UK organized by Evidence Base strongly suggested that the further development of joint use libraries in a variety of different contexts may call for a radical reconsideration of the role and responsibility of staff in such an environment (Evidence Base, 2005). Such efforts may help to overcome some of the potential problems and develop a new form of hybrid librarian for joint use library environments.

In Worcester the potential difficulties of integrating staff are acknowledged, but it is hoped that the same issues of pay comparability that other libraries have encountered will be minimal, and a careful process of job evaluation is planned to help to ensure equity. Similarly, at a senior level, staff have already begun to work well together on developing the vision that has already dispelled any stereotypical misconceptions.

Such aspects of staffing may be difficult to reconcile, and it may be the case that the best approach is to acknowledge this and plan to manage these

differences as effectively as possible. In some cases the differences may bring positive results. In Worcester it is expected that the differences between staff coming from different services will be in expertise and role emphasis, which will mean that the community will get a richness and depth of service and experience; for example, the skills in reader development developed by many public librarians may benefit student users of the library service.

Resources and Services

Clear agreement about the allocation of, and access to, resources and services is important to a successful partnership. Some examples of areas where clear decisions are needed at the outset are outlined below.

The Martin Luther King Jr. Library highlighted some initial difficulties in agreeing how the reference service might work, specifically whether the service should be "a side-by-side, or 'duplex' model, or fully integrated operation" (Conaway, 2000, p. 42). Some of the university librarians wanted separate reference services for students and the public, whereas most public librarians felt that their professional skills were being undervalued by university staff wanting two reference desks.

Aligning the library classification systems and providing catalog access to collections may prove challenging. For example, the Alvin Sherman Library and Research and Information Center in Florida is a joint public and university library that arranges its scholarly books using the Library of Congress classification system, while more popular materials are classified using Dewey Decimal classification; the catalogs are joint catalogs (Nova Southeastern University, 2004). The Martin Luther King Jr. Library has also made the decision to have one catalog for its collection. In contrast, the Lichfield joint use library does not have integrated catalogs, and this is something that students have found problematic (McNicol, 2004). Similarly, a joint use library in Hervey Bay in Southern Queensland, Australia, which consists of the Hervey Bay City Council and the University of Southern Queensland, has reported difficulties with their separate catalogs (Humphreys & Cooper, 1998).

Agreement on opening hours may be challenging for joint use libraries. In some cases where libraries have aligned their opening hours with the public library service, such as Lichfield and Hervey Bay, it has meant that the library is available to students for shorter periods than if the university opening hours were adhered to (McNicol, 2004; Humphreys & Cooper, 1998). In the Worcester joint use library it is hoped that the range of activity, cultural experiences, and children's services, plus the addition of high-quality catering and exhibitions (with some appropriate small-scale retail) will make the library a destination attracting longer visits from the community, with all users benefiting from extended opening hours.

Other issues around access to materials and resources can be challenging. This can include differences in the public and university licences

for access to electronic journals and different loan periods. In addition, students may feel that there will be difficulties in guaranteeing sufficient resources are available for them to support their paid courses if the public is using the library too (McNicol, 2004; McNicol et al., 2002). Worcester recognizes that these sensitivities have to be addressed during service concept development.

A LEARNING PHILOSOPHY

Faulkner (1994) says that the most successful long-term alliances are those in which the partners learn to learn from each other so that their mutual agenda shifts and develops as the alliance matures. Although it is the very early stages of the Worcester development, the partners have already started to adopt a learning philosophy and have taken time to learn from the experiences of the Martin Luther King Jr. Library, which has significant parallels with what is being planned in Worcester: a relatively small site, on the edge of the university campus, combining two significant, but not overly generously funded, libraries.

One way in which a successful alliance can continue to learn and grow is through the use of effective evaluation from the planning stages through the ongoing provision of the service. Evidence from the literature suggests that, across a broad range of joint use libraries, evaluation is often an aspect that is neglected or poorly approached. One of the only attempts to devise a system for evaluation of joint use libraries is that developed by Amey (1987). Considering evaluation and performance measures for a joint use library before it is built may seem extreme. However, this can clearly be of great value for organizational learning. Considering evaluation issues in terms of the operating library can act as a reality check and help to test assumptions about how the library will work in reality. Such activities can help to highlight areas that need more attention and that may need to be added into an initial memo of understanding and partnership agreements between all organizations involved.

Evaluation is useful for each of the partners to find out more about each other. In the Martin Luther King Jr. Library, for example, evaluation was important and commenced at an early stage. Staff consultation had highlighted potential tensions in staffing the reference service. Thus, significant evaluation efforts were put in place to further explore the issues and discover potential solutions. As a result, some activities were devoted to planning this aspect of the library, including "several retreats . . . focus groups for faculty, students, and the public" (Conaway, 2000, p. 43). A professor of information studies was also engaged to assist in the design and analysis of a shadowing project and two surveys.

Evaluation can also help the joint use library to find out more about its changing user base. Examples exist of user consultation and evaluation being undertaken prior to developing a joint use library. Hervey Bay made

great efforts to communicate with its users in a wide range of ways, including newsletters, newspaper columns, pamphlets, personal contacts, and setting up a user group (Humphreys & Cooper, 1998). In the Martin Luther King Jr. Library, community forums were used to inform development (Kaupilla & Russell, 2003, p. 262). Evaluation is not without its challenges; for example, the Martin Luther King Jr. Library found that early user opposition existed, with potential university users believing that "the public were going to take over the collections" and the local community concerned that funding would be diverted from branch libraries. However, raising such issues at an early stage allowed the library planning team to address these groups' concerns prior to opening the library (Conaway, 2000, p. 42).

Developing ongoing performance measures for joint university-public libraries is not without its challenges. Separate performance targets exist relating to public libraries and university libraries. For example, in the UK university libraries can develop performance measures based on the SCONUL (Society of College, University, and National Libraries) guidelines or feed into HEFCE institutional targets. For public libraries, the government, through the Audit Commission, provides targets for performance: the public library service measures and public library impact measures. However, in the UK joint use libraries effectively fall outside of any remit to adhere to a single set of measures or standards applicable to the whole service. Without such national frameworks, developing shared targets and ongoing learning through performance can be difficult. Senior staff at Worcester plan to address this issue through joint consultation and discussion with their respective monitoring bodies during the planning process.

CONGRUENT LONG-TERM GOALS

Faulkner (1994) points out the value of partners having congruent long-term goals. In the Worcester joint use library initiative all partners see the value of the collaborative arrangement over the long term. For example, for the University of Worcester the joint use library will figure as a key aspect of the Strategic Plan, which is currently being revised. The university masterplan for the new campus drafted in April 2005 states: "It became clear that the potential existed to develop a unique university/public partnership approach to the library and locate it on a site adjacent to the Castle Street site itself, but nearer to the city centre. The possibility of using the library as a physical as well as an intellectual and virtual 'bridge' to and from the broader community thus became available" (University of Worcester, 2005, p. 10).

CONCLUSION

The Worcester joint use library and history center is likely to be completely new for the United Kingdom and highly innovative internationally. It will provide a paradigm for future development in other cities, and it

represents a model of cross-sector cooperation that is integral to the modernization agenda in a creatively collaborative way. It represents an efficient use of scarce public funds for infrastructure development.

Such a development will create a cultural, learning, and information center of excellence, engendering social inclusion and raising aspirations in the broadest sense for the whole community, regardless of age, background, and ability, and in a way that contributes uniquely to the regeneration of the city of Worcester and beyond. It will invigorate the city and stimulate the desire to learn, both formally and informally. It is expected that it will demonstrate beyond doubt that public and academic libraries share a single vision and serve a single community. However, the only way to realize this is to work successfully in partnership.

In order to realize this vision the need to take steps and plan for a successful strategic alliance cannot be underestimated. Faulkner (1994) has identified some key factors that contribute to the success of alliances. In ambitious, innovative alliances such as the Worcester joint use library, where the alliance is on a large scale involving multiple partners and stakeholders, ensuring that the groundwork for a successful alliance is in place is vital, although the many emerging joint use ventures on a smaller scale could also benefit from taking note of these lessons.

The Worcester joint use library and history center planning team has acknowledged the importance of these factors in establishing a long-term alliance. The team has also learned from other large-scale joint use library developments such as the staff of the Martin Luther King Jr. Library, who have worked so hard to put into practice the reality that "A college education is just a step away from the public library" (Kirchoff, 2005, p. 10).

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Just Collaboration or Really Something Else? On Joint Use Libraries and Normative Institutional Change with Two Examples from Sweden

JOACIM HANSSON

ABSTRACT

This article is an attempt to discuss the establishment of joint use libraries as something more than just administrative collaboration. It focuses on joint use solutions between public libraries and university college libraries. Normative institutionalism is used as a theoretical framework for the discussion, which draws from studies on and experiences of the establishment of two joint use libraries in Sweden: Sambiblioteket in Härnösand and Almedalsbiblioteket in Visby. Conclusions are drawn that show that the establishment of joint use libraries is a very complex process of change. Norms and values of the collaborating units are challenged, and the institutional identities of participating libraries as well as the professional identities of the librarians are subject to change. This is due to a shift in normative institutional identity, which makes it possible to claim that joint use libraries may actually be regarded as a new form of library with a unique identity. In claiming this, a need for further library and information science research on joint use libraries is called for.

INTRODUCTION

The library as a medium of communication is going to have its impact upon the communication of society too. It is our objective, our role in society, our dedicated purpose, to make this communication as complete as possible. (Shera, 1970, p. 76)

A major activity in political institutions is educating individuals into knowledgeable citizens. A knowledgeable citizen is one who is familiar with the rules of appropriate behavior and with the moral and intellectual virtues of the polity, and who thus knows the institutional reasons

for behaviors, and can justify them by reference to the requirements of a larger order. (March & Olsen, 1989, p. 161)

These two quotes say something essential about the point of departure for any analysis of library change and development. The first is stated within the context of librarianship, the second within the normative institutionalism that has reshaped political science during the last two decades (Peters, 1999). When considering joint use libraries, they point directly to various aspects that are at the center of interest. The discussion in this article will emanate from the experiences of establishing joint use libraries in Sweden. As such, joint use libraries are nothing new in Sweden. In 1842 a national school bill was passed by King Carl XIV Johan and the Swedish Parliament that encouraged elementary schools all over the country to establish library activities. In many cases this requirement was solved practically by placing the local parish library within the school building as a combined school and community library for the benefit of the working classes or, in most places, country folk. These kinds of libraries have been with us ever since, although they have changed and developed over time. At the beginning of the twenty-first century, however, a new form of joint use library emerged. Almost simultaneously in the two towns of Härnösand and Visby, new libraries were established combining the services of the local public library with those of the local university college library. These two libraries have been put forward, in the Swedish discussion, as something new, and, although the form of integration differs between the collaborating library units, the phenomenon as such has been heralded as something that meets the requirements of the knowledge society.

I will make a brief presentation of these two libraries, Sambiblioteket¹ in Härnösand and Almedalsbiblioteket in Visby. However, the emphasis will not be on the actual description but rather on the question of what is actually “new” in these libraries from an institutional point of view. Is it possible to speak of these joint use libraries as a whole new form of library, or are they merely an administrative collaboration aiming to, in the words of Ranganathan (1931), “save the time of the user”? My initial claim, to which I will return, is that the creation of a joint use library from one public library and one academic library is problematic due to differences in institutional logic and affiliations. Public libraries are best viewed as political institutions, while academic libraries relate more to the world of “science” or “education.” Reading the international literature on joint use libraries, it is clear that it is time to move beyond the production of yet another set of guidelines for the implementation or evaluation of singular library initiatives. This article is an attempt in such a direction.

WHAT IS A LIBRARY?

The fundamental question “What is a library?” is rarely asked. It is relevant, however, in relation to the establishment of joint use libraries. At

least since Lowell Martin published his influential essay "The American Public Library as a Social Institution" in *Library Quarterly* in 1937, libraries have been seen as institutions influenced by social and political changes, driven by an idea of being in some way beneficial for contemporary society. In the late 1960s Jesse Shera modified this view by suggesting that libraries should be seen rather as agencies that implement the underlying idea of the institution, which he somewhat vaguely labels "knowledge," equivalent to, for example, marriage, law, and religion. He motivates the distinction between institution and agency as follows: "I prefer to think of the library as a social agency—as an agency rather than as an institution—because, I think there is a real distinction between the great concepts like family, religion, law, and so on, and the agencies that are responsible for implementing the basic underlying bodies of belief" (Shera, 1970, p. 60). With this distinction, he makes way for the idea that libraries can exert an influence on society as a whole, something that is a core issue in social epistemology, the theoretical foundation of librarianship first formulated by Margaret Egan and Jesse Shera in 1952. It is important to mention this perspective, proposed by Shera, as most library and information science (LIS) research devoted to library issues today assumes that the library as an institution is more or less instrumentally influenced by society, but seldom the other way around. Where the library is seen to have an influence is in the sphere of general political thoughts such as the development of democracy in fostering citizens to become active participants in democratic processes. Seen as merely an institution, libraries can be defined as rather passive and at best responsive to social change. Defining them as agencies in Shera's sense, they might be understood as active in propagating and accomplishing social development. This view is further compatible with the so-called new institutionalism that has grown within political science over the last two decades. This refutes the traditional theory of institutions as reductionistic, instrumental, and functionalistic. New institutionalism has the following characteristics in analyzing political action and institutions: "Rather than collective action being the major conundrum that it is for the economists, collective action should become . . . the dominant approach to understanding political life. Further, the relationship between political collectivities and their socio-economic environment should be reciprocal, with politics having the option of shaping society as much as society does of shaping politics" (Peters, 1999, p. 17).

New institutionalism shows itself in many guises, but one that is particularly suitable for the analysis of libraries and issues related to their institutional characteristics is normative institutionalism as presented by James G. March and Johan P. Olsen (1989) in direct opposition to rational choice theory or rational choice institutionalism. I will use their theory, which combines the reciprocity of social environments and institutional development with the importance of shared values and meaning between

members (or agents) of an institution, to create an understanding of the problems that make joint use libraries something more than just issues of administration.

The definition of the conceptual foundation of a library is not so unambiguous that it is possible to define all types of libraries in the same way. In Sweden the division between public libraries and academic libraries into two separate communities has traditionally been very distinct. This alone is enough to claim that a library is not to be defined by what it does in a technical or administrative sense but rather by what aims it sets out to fulfil. In the literature on joint use libraries, some effort has been put into definition. One of the more authoritative is provided by Alan Bundy. In his words, a joint use library is "a library in which two or more distinct library services providers, usually a school and a public library, serve their client groups in the same building, based on an agreement that specifies the relationship between the providers" (2003, p. 129). Focusing on joint use libraries combining public libraries and university libraries, Kathleen Imhoff gives a somewhat similar definition: "A joint use library involves two or more libraries of different types coming together to provide services in a single building operating cooperatively to provide resources, such as curriculum support, bibliographic instruction, and information literacy to the general public and/or students, faculty and administrators" (2001, p. 18–19). Both of these definitions are administrative rather than conceptual, and neither of them touches upon the problematic issue of what institutional "idea" the joint use library, seen as an institutional agency, is set to implement. In order to do so we must direct ourselves away from the administrative aspects of the library and instead focus on conceptual and situational aspects.

The conceptual aspect of a definition of any kind of library can take its departure in various uses of the term *library* itself and metaphors used to denote the use of libraries in society. Arja Mäntykangas (1999) claims that we really only can agree upon a basic conceptual definition of a library that is fundamentally linked to the existence of a limited, organized collection of documents. As soon as we include other aspects, we start to disagree, due mostly to the variety of situational aspects such as social and educational settings, which influence, and are influenced by, the institutional identity of the singular library. Romulo Enmark sees further reasons for the conceptual confusion surrounding our understanding of the library: "There is a risk that the terminology has not in all respects been created on the premises of the world of the library. For example, it is possible that the frequent use of the concept of information is primarily associated with visions that have arisen outside the world of the library, that is industrial and technological dreams of a future information society" (1990, pp. 57–58).

Today, fifteen years on, we see that the information society is no longer in the future, but we still experience a prevalent discomfort in a concept of information that governs much of the contemporary library discourse.

The problem of a deflated meaning of information as a concept due to frequent, unreflective overexposure and use in both LIS research and practical librarianship has lately been acknowledged by several scholars, such as Jonathan Furner (2004) and Bernd Frohmann (2004).

The situational aspects of libraries and librarianship do, in many ways, contradict the very thought of a general conceptual foundation of "the library" as advocated by Shera. Instead they indicate a need to look for individual cultural and social settings in order to define the relations between different types of libraries aiming at the implementation of different institutional "ideas." This is sometimes described as an institutional perspective, or even paradigm, within LIS (Hansson, 2004), and the use of examples from different local community settings in descriptions of joint use library activities are ubiquitous in the literature. Two good examples of this are L. J. Amey's anthology *Combining Libraries: The Canadian and Australian Experience* (1987) and Jens Thorhaug's compilation *Nordic Public Libraries: The Nordic Cultural Sphere and Its Public Libraries* (2002). It is more unusual, however, to use local community conditions and initiatives as a means of grasping essential features of certain types of libraries in a manner that goes beyond the strictly administrative definitions such as the ones by Bundy and Imhoff. In order to reach a deeper understanding of the mechanisms that trigger the establishment of joint use libraries by combining university college libraries and public libraries in Sweden, I will now turn to a primarily situational analysis of the libraries in Härnösand and Visby. A brief description of the libraries will be followed by a conceptual discussion based on the social, political, and cultural aspects of Swedish library development.

TWO KINDS OF JOINT USE LIBRARIES

In a *Resource Sharing and Information Networks* special issue on joint use libraries, William Miller states that "the fastest growing trend now is for academic libraries (community college and university) or academic and public libraries to come together in a variety of ways" (Miller, 2001, p. 2). The collaboration between libraries can take on different forms. Karen Dornseif identifies three levels of integration: minimal, selective, and full (2001, pp. 107–108). *Minimal integration* basically consists of a simple co-location of two libraries with preserved individual identities and services. This form is mainly chosen by large, well-established libraries anxious to keep their reputation or traditional identity. *Selective integration* can take different forms. The most common is, perhaps, where the different libraries bring their specific strengths to the collaboration. The academic library might, for example, take on the responsibility for reference services, while the public library develops circulation, popular materials, and activities that go beyond document bound services, such as exhibitions, performances, storytelling, and counselling (Matarasso, 1989; Black & Muddiman, 1997).

Another form is to vary the staff over the day in order to meet the requirements of different user groups that come to the library at different times of the day; students meet academic librarians during the day, and the public meets public librarians during evenings and weekends. *Full integration* is, perhaps, the most innovative way of working in a joint use library. It means that the libraries unite behind one mission that equally reformulates the former mission of the public library as well as that of the academic library. This kind of joint use library is, however, relatively rare.

The libraries in Härnösand and Visby represent different levels of integration and are of two different kinds. They have earlier been briefly presented in the international literature by Bundy (2003) and Kratz (2003). Sambiblioteket in Härnösand has developed a form of selective integration, while Almedalsbiblioteket has more the character of a fully integrated library. In both cases all services from the former separate libraries have been kept intact in, at least, a superficial sense. There are, however, significant differences in the ways problems and tasks are addressed.

Like most joint use libraries, Sambiblioteket and Almedalsbiblioteket are situated in small towns rather distant from cultural and economic centers, which in Sweden are restricted to three regions: the Stockholm area, the Gothenburg region in the west, and the Malmö/Lund region in the south. Both Visby and Härnösand have, however, rather distinct roles in Swedish history. Härnösand has been labelled "the Athens of Northern Sweden," and one of the first senior high schools in Sweden was established there in 1649. Today, the town has about 25,000 inhabitants in a part of Sweden that is dominated by traditional heavy forest industry and plagued by depopulation. Visby is one of the oldest towns in Sweden and is situated on the large island Gotland in the middle of the Baltic Sea. Its importance during the medieval Hansa trade union was crucial, and the town is still dominated by its internationally famous town wall and several other medieval buildings and sites. Today, Gotland, with Visby as its center, forms a region primarily directed toward tourism and culture, with about 57,000 inhabitants living on the whole island.

PREPARATORY PROCESS

The thought of a joint use library in Visby emerged alongside the development of the local university college, which was fully established in 1998. Many students preferred the public library to the university college library as their primary resource for information. An organized cooperation between the two libraries, it seemed, would suit this user group well. The main argument for the public library to engage in the issue was a badly felt need for more space. The thought of co-locating the two libraries was not received well among all user groups. While most students welcomed the merging of the two libraries, a loud and afflicted debate arose among the public library's traditional user groups. This discussion was played out in

the local media. The new library was to be bigger and more modern than the old public library, but it was to be placed outside the town center, close to the university college. There was a widespread fear that the university college library would “eat” the public library and that the joint use library would become a library more suited for students than for the general public. Widmark (2000) identifies a strong ideological movement within the public library debate emphasizing the different traditions and fundamental values attributed to each of the libraries: “Vi mot dem, folket mot eliten, arbetare mot studenter, hög, mot lågutbildade, hög- mot lågavlönade och ungdomar mot barn/gamla. Folkbiblioteket med dess ideologiska bas har setts som en institution för nå ett jämlikare samhälle . . . Att folkbiblioteken slå samman med en institution som endast varit förunnat ett fåtal kan kännas skrämmande” (2000, p. 32).² Several of the participants in the discussion saw the public library as a counterpoint to formal education, a space where free *bildung* could be obtained. That public libraries are generally regarded as ideological institutions is not surprising. It is interesting, however, to see the amount of repressive ideology that is placed on the formal education sector, and thus the libraries affiliated with it, by the general public, especially since the democratization and decentralization of higher education in Sweden has been going on for well over thirty years.

Some of the public library staff shared the fears of the public at the beginning of the project, but most could see the benefits of better facilities, even though the library was to move from the very advantageous location, where it had for a long time been an integral part of people’s local identity and community life. Josefsson (2000) shows in an interview study concerning the motivations for different forms of collaborations between university college libraries and public libraries that many worried that the moving of the library in Visby would mean a change of the local identity in a way that would be beneficial for, primarily, the local university college.

In a public investigation made prior to the establishment of Almedalsbiblioteket, it was clear that the new joint use solution was, in fact, developed primarily to meet the needs of the university college as a way of increasing support to, for example, the Gotland Centre for Baltic Studies, the Centre for the Viking Heritage, and the Hanseatic Network—all networks and centers of excellence with highly qualified academics needing information provision (Olausson, 1997). The investigation states the following as the most important points of departure for the joint use library project:

- Society heads toward a knowledge society
- Lifelong learning and research is what takes us from the industrial era to a post-industrial era,
- Small and medium sized, knowledge intense enterprises need to be established in order to decrease unemployment not only in the large cities but in the remote regions as well

- The borders between formal, postgraduate education and informal, lifelong learning are diminishing
- The prerequisites for learning and research are good teachers, adequate pedagogical methods, and rich information resources, stimulating study environments, curiosity, and high motivation among students (Olausson, 1997, p. 89)

In the face of this, some of the public librarians and much of the public with no links to the university college or the student community became anxious and were angered. These kinds of conflicts, however, do not seem to be unique to the situation in Visby but instead are rather common. Sometimes it can be reversed, meaning that students and academic librarians fear that public access, or perhaps rather an increased public use of the university library collections, will mean that material will be unavailable for students when they need it. This was, for example, the case with the largest joint use library in the world, the Dr. Martin Luther King Jr. Library in San Jose, California (Kauppila & Russell, 2003).

The phase initiating the establishment of Sambiblioteket in Härnösand looks slightly different from the one in Visby. The main motive for the development into a joint use library was not so much the lack of resources and space in the former libraries, although this was important. Instead, a sense of shared community responsibility is visible through the whole planning process of the project. The public library and the university college decided to join forces with a holistic view of community library service in mind, one that did not differentiate between students and academics on the one hand, and the so-called general public on the other. The new library was seen as a way for a small town to provide an optimal library and information service to its citizens. Administratively separate, but united in the face of the users, the new library was seen by most as a way of establishing Härnösand in the knowledge society with the university college as one of its epicenters. The stages of development are described from a number of economic, practical, and emotional aspects in *Sambiblioteket: från idé till verklighet* (Gillgren, 2000). In an article in the *Nordic Journal of Documentation*, the directors of the three libraries involved—the local public library, the university college library, and the regional library—stated a vision of what was to come:

Sambiblioteket skall vara en kunskapscentral för yrkesutövare, studerande på alla nivåer, företagare och gemene man. Men sambiblioteket skall också erbjuda miljöer för stillhet och eftertanke, förströelse och samtal. Där skall också finnas en väl utvecklad verksamhet för barn och unga där man tillämpar ny rön om inlärning och där fantasi och skapande stimuleras. Det skall naturligtvis också uppfylla de krav på fysisk miljö, teknisk utrustning och medier som funktionshinder ställer på biblioteket. (Gómez, Hultén & Drehmer, 1998a, p. 121)³

The idea of a joint use library was conceived in Härnösand in the mid-1980s, but for many reasons it could not be initiated until the late 1990s. The project was dominated by an integrated view of library services where the traditional ideological differences between the academic library sector and the public libraries were overlooked in favor of the recognition of each other's strengths. This is apparent in Josefsson (2000), who shows that the kind of conflict visible in Visby is much less emphasized in Härnösand, even if it is possible to sense concern for a development that is disadvantageous to some of the traditional public library user groups. When analyzing the process prior to the establishment of the new library, Sundin (1999) notes that there were very few people who had any actual insight to the project and its rather complex organization. The staffs of the different units were set to focus on the contribution of their own organization without any connection to the "large picture." There was an apparent gap between a discursive level upheld by an initiated few and a practical level handled by the many. Not until rather late in the process, as architectural issues were raised, was there a common ground between the libraries from which the work could be concluded.

The Problem of Organization

The organization of the library in Härnösand is not as fully integrated as in Visby. Even though the joint vision cited above was shared by all participating units, there are still three distinct library units working side by side in the library, even if it is in such a way that the user cannot tell one from the other. The units are tied together by an agreement that regulates issues like rents, inventories, and information and communication technology (ICT) development. A library council with representatives from each unit is responsible for the overall planning and management of the library, while the staffs concentrate on their various fields of expertise. In as many fields as possible, staff from the different units develop practical work and user relations together.

In Visby the two former libraries have joined, and there is now hardly any difference between public and academic librarians. With regard to the mission statements of the library, it is quite clear that the merge has been undertaken on the terms of the university college library. The Web site of Almedalsbiblioteket reveals the public library in a more subjugated position than in Sambiblioteket.⁴ It would seem that the clear-cut borders between the units in Härnösand make it possible for them to keep their distinct characters and preserve their different traditional roles in relation to the very diverse user groups of the library.

However different the construction of the collaboration may be, there is one thing that unites both libraries. It is no longer possible to speak of them as either public or academic libraries. This is a more profound change

than might be understood by just examining their various administrative solutions or, more or less implicit, structures of power between different units within the organizational structure itself. Is it possible, therefore, to claim that the joint use library as a phenomenon disrupts the traditional division between different types of libraries and, if so, are we faced with a manifestation of a new library institution, or agent in Shera's sense, better equipped than previous institutions to meet the requirements of the late modern knowledge society? We might have reached a stage in social development where the sense of a scattered reality and changed relations between various forms of knowledge not only make way for new ways of doing research on and describing libraries but for new ways of performing practical librarianship as well (Hansson, 2005a). The two libraries at the center of this study raise these questions in a very direct manner.

CHANGE AND INSTITUTIONAL IDENTITY

As was shown above, when Jesse Shera (1970) discusses librarianship as an institution, he claims that librarianship and libraries cannot be seen as institutions *per se* but rather as agents working as tools for the fulfilment of the idea, or ideology, behind a greater institution, somewhat vaguely defined as "knowledge." In the mid-1960s it was important for Shera to be specific about the view of libraries as institutions. Today, most will easily recognize this distinction as, if not trivial, at least reasonable and uncontroversial. Accepting this, we must return to the question of what institution, or institutions, libraries and librarianship are to formulate as agents and, in doing so, we need to move beyond Shera.

It is reasonable to distinguish between different institutional affiliations for different types of libraries, as well as different forms of librarianship. This is reasonable not only in an analytical sense; such distinctions are made in practice in most countries. Several scholars have argued that public libraries perhaps should not, primarily, be seen as agents within the institution of knowledge or science but rather within politics (Audunson, 1999; Hansson, 1998; McCabe, 2001; Johansson, 2004). Unlike academic librarianship's instrumental purpose in supporting the process of scientific work and development, public librarianship has a role in society that is considerably more complex, in such a way that it cannot only be defined in an instrumental relation to science, or even more broadly, knowledge production. The basic aim for public libraries, since their establishment in Sweden in the beginning of the twentieth century, has been to function as complementary to education and in such a way that they might be seen as a part of the institution of knowledge. However, their activities have always gone beyond this, and the action taken by local public libraries as creators of local community identity and providers of cultural activity and a free public space for information seeking and leisure reading outside the confinements of the educational system, places them within the realm

of politics. As agents of politics they are legitimized as a part of the institutional structure that is created by certain societies in order to secure their continuity and prevalence. In a democracy, public libraries are among the key agents that construct basic social structure, as well as reflect the fundamental values and norms necessary for democratic development. Kerslake and Kinell (1998) argue that a fundamental justification of public libraries is their connection to concepts of citizenship. If we look back over the last century, democratic development in Sweden has been strong, but it has moved forward in small steps, one at a time. Verna Pungitore notes the same when characterizing the way in which public libraries usually meet change and innovation: "Many of the transformations in public library services and programs since the turn of the century reflect non-controversial and incremental change, with perhaps a slight improvement in performance. Upon close inspection, the changes often turn out to be extensions of traditional programs that may or may not include an innovative feature" (Pungitore, 1995, p. 6). Zetterlund and Hansson (1997), Zetterlund (2004), and Hansson (2005b) confirm that this is the case, looking specifically at public library development in Sweden. While Pungitore (1995) sees this as a problematic point of departure in an analysis of how public libraries may be developed into something more innovative and dynamic, it is possible to create an understanding of why development is characterized by incremental change and not rapid innovation. It is not even necessary to regard this as a problem; rather it can be accepted that it, perhaps, could not be in any other way. The interesting question, then, becomes why there is this sudden need for a change of institutional affiliation of library and information services in a way that redefines the role of libraries in society and reformulates their overall mission statements into something we have not seen before—a redefinition and reformulation that I claim occurs in the establishment of joint use libraries. There are, of course, no clear-cut answers to this, but one key to understanding the present development might be sought within the theory of normative institutionalism (March & Olsen, 1989; Peters, 1999).

Normative institutionalism has proven interesting and fruitful in analyses of library development on several occasions (Audunson, 1999; Zetterlund, 2004). The reason for this is that, in addition to a view on institutions that is fairly common in political science and more compatible with the distinction between institutions and agents as seen in Shera, it emphasizes institutional identity, made visible through certain values, norms, and regulative rules. The boundaries between institutions and agents are not clearly defined in the writings of March and Olsen, but the distinction is there whether, for example, we view the organization as an agent or an institution or whether we see the individual in relation to an institution defined at an organizational level or more sociologically (marriage, law, education, etc.). Agents, whether individuals or organizations, develop and function within

the given institution in accordance with these norms and values, which are seen as governing the manifestations of the institution. The way in which agents adapt is called a "logic of appropriateness." This is contrasted against a logic of consequentiality that we find in systems theory and traditional institutional theory. March and Olsen maintain that

In a logic of appropriateness . . . behaviors (beliefs as well as actions) are intentional but not willful. They involve fulfilling the obligations of a role in a situation, and so trying to determine the imperatives of holding a position. Action stems from a conception of necessity rather than preference. Within a logic of appropriateness, a sane person is one who is "in touch with identity" in the sense of maintaining consistency between behavior and a conception of self in a social role. Ambiguity or conflict in rules is typically resolved not by shifting to a logic of consequentiality and rational calculation, but by trying to clarify the rules, make distinctions, determine what the situation is and what definition "fits." (March & Olsen, 1989, pp. 160–161)

Guy Peters views another angle of the "logic of appropriateness" concept:

The operation of the logic of appropriateness can be seen as a version of role theory. The institution defines a set of behavioral expectations for individuals in positions within the institution and then reinforces behavior that is appropriate for the role and sanctions behavior that is inappropriate. Some aspects of the role may apply to all members of the institution, while other expectations may be specific to the position held by an individual. Further, like organizational culture there may be several versions of the role among which a role occupant can pick and choose. . . . Despite the somewhat amorphous nature of a role, the concept does provide a means of linking individual behavior and the institution. (Peters, 1999, p. 30)

From these two quotes we may deduce several features pertaining to the change of institutional identity that is enacted through the establishment of joint use libraries. In doing so, of course, it must be emphasized that by "individual" I mean the individual library organization and not individuals in the sense of physical persons. The most important aspects relevant for the present analysis are the following:

- Fulfilling the obligations of an expected role
- Maintaining consistency between behavior and self in a social role
- Resolving ambiguity and conflict by situational analysis

These are complementary and distinctive enough to provide a basis for developing the argument raised by the initial question of this investigation, namely, is it possible (or at least reasonable) to view joint use libraries as a new form of institution, or should they be considered solely as a timely kind of collaboration?

OBLIGATIONS OF EXPECTED ROLES

The publicly funded libraries in Sweden have, for decades, been rather fixed in relation to the expectations placed upon them by society at large. Further, there has been little conflict and the boundaries between the different parts of the library sector have been clear both socially and professionally. The institutional roles ascribed to different libraries are largely dependent on their affiliations in the political field. Since the beginning of the 1970s, Swedish public libraries have belonged to the Department of Cultural Policy, and public library development has always been a key issue in Swedish cultural policy. The mission and expected role of public libraries has been governed largely by the general goals of cultural policy, which were determined by the government in 1974 (*Kungl. Maj:ts proposition*, 1974; Nilsson, 2003, pp. 241–255).⁵ These goals envisioned the public libraries as guardians of good taste, and the most debated clause stated that the public libraries should be an active alternative to commercial forces present within culture and entertainment; besides merely presenting alternative options, they should actively work against commercialism. This was an important part of the logic of appropriateness in the 1970s in Sweden and well in line with the very left-wing social democracy, under the leadership of Olof Palme, that was in government during this period.

Academic libraries were never associated with the goals of cultural policy even if they have tasks of considerable cultural significance, primarily as memory institutions. Instead, they have been defined in relation to overall educational goals in society, with a mission more instrumentally linked to the information provision for the institutions of higher education.

The social expectations placed on the academic libraries never really interfered with those of the public libraries, at least not until the late 1990s. Then, the view on adult education and higher academic education became more important than before. The Swedish government presented a number of decisions that aimed at raising the general level of education among the population throughout the country. The most dramatic of these, perhaps, was the decision to increase the percentage of the adult population in academic studies to fifty percent. This increased political emphasis on adult education showed itself immediately within the different parts of the library sector. Primarily, the public libraries saw the usage of their services change, with numerous students obviously totally indifferent to the institutional affiliations of the library they chose to visit as long as they got what they wanted. Public libraries were expected to supply academic information in a manner that earlier had not been a prioritized service. As vast amounts of money were directed to the educational sector and library services were continually hailed as crucial in this new emerging educational superstructure that impacted the whole of society, the public librarians started to fear for the future of traditional services that were not

directed toward students, such as services for children and the elderly. We have also seen that this fear was present in the public debate concerning the establishment of the joint use library in Visby.

What has basically happened on the level of the social expectations of roles for library services are two things:

1. The part of the democratic fundament where public libraries have been central through their identity as cultural institutions has changed as education has been defined politically as the single most important factor to enhance democratic development. This is of course not anything specific for Sweden but has been crucial within the European Union since at least the mid-1990s (Thorhauge et al., 1997).
2. The boundaries between the different parts of the library sector have diminished. It has become more common, both within the library community and outside it, to talk of library and information services in a more holistic way than before. This is where the establishment of joint use libraries comes in as a manifestation of a new way of defining library and information services politically. This redefinition became politically manifest during autumn 2004, when Prime Minister Göran Persson reformed his government and created a "joint-department" for education and cultural policy. No sector was so immediately influenced by this as the library sector, having its affiliations in both these political domains. One of the most interesting manifestations of this redirection is the new joint use library.

CONSISTENCY BETWEEN BEHAVIOR AND SELF

If we focus on the consistency between the self-identity of libraries and the behavior that has characterized them in the face of new political ways of formulating expectations of the roles that they are set to fulfil, it may be of interest to resume the discussion on the "sane" behavior indicated by March and Olsen, who state that a sane person is one who is "in touch with identity" (March & Olsen 1989, p. 161). This is something that might be difficult enough for any of us, but in the political development sketched above it is clear that the identity, the self, of the academic libraries has seldom been scrutinized. Rather, it is a confirmation of the benefit of their services as instrumental information providers to students of all kinds, which is now seen as the politically correct core of library and information services in Swedish society. Instead, it is the public libraries that have to regard themselves in the mirror one more time to see if their face fits within this new ideal of beauty. The direction in which the public libraries have chosen to look, interestingly enough, is not toward the academic libraries but instead toward the users. The increasing number of students that frequent public libraries in the wake of these major political initiatives has been described, for a long time, as a major problem hindering the realization of cultural policy goals determined in 1974. In a cultural

policy revision in 1995 (*Kulturpolitikens inriktning*, 1995)⁶, the goals were kept intact, and although aggressive countercultural identity was somewhat held back, many public librarians still identify with them. Thus, they regard the joining of the separate domains of cultural and educational policy as a threat to the self-identity of the libraries, not just as cultural agents, but as part of the institutional superstructure of the democratic welfare state. In today's libraries, as in many other aspects of society, the latter must be regarded as a historical state of affairs rather than a contemporary condition. A strong identity within this superstructure is well grounded in the historical development of public librarianship as one of the cornerstones in the public identity of the social democratic welfare state, something also noted by Audunson (1999). In this respect it is important to note that Swedish public libraries have their roots in a completely different soil than those of, for example, the American public libraries. The Swedish public libraries emerged from individual initiatives taken by industrial and rural workers organizing themselves in good templar movements and trade unions with the explicit goal of allowing their members to prepare to be a part of a democratic political development (Torstensson, 1995). Thus, the popular "anchorage" of public libraries in Sweden is very strong, and librarians generally tend to speak of their professional identity in relation to politically or economically disadvantaged groups in society. Students of higher education are not among those groups.

This makes it possible to understand the reactions of both the public and public librarians in the process of establishing the joint use libraries in Härnösand and Visby. We are faced with a major shift in identity that shows itself not only in the organizational and administrative collaboration with an academic library, but in more momentous and overreaching ways in the redirection of prioritized user groups and affiliations to fit emerging new political initiatives and directions. Joint use libraries, even though they may work on an organizational level, challenge the identity, the self, of the public libraries on a very real "street level" where the actual meeting between the librarian and the library user is taking place. In the face of this, one's way of keeping one's "sanity" is to discuss and debate a form of understanding of the fundamental premises for collaboration. The public debate that has been seen, at its most explicit in Visby, must therefore not be regarded as general moaning but rather as something that well meets the requirement for "sane" behavior in the face of change, as formulated by March and Olsen.

RESOLVING AMBIGUITY AND CONFLICT

When we assume that joint use libraries actually are new kinds of libraries, differing from the ones that constitute their basis, we certainly face a situation of ambiguity and potential conflict. Both of the examples described in this article have shown this. It is clear that, in the merging of

a public library and an academic library, it is the norms and values of the public library that are challenged. This should come as no surprise if we look at the general history of libraries, where the emergence of new types of libraries has usually been defined in relation to the structure of higher education at that point in time (Harris, 1995). Public libraries are defined in the Scandinavian countries in relation to popular movements, or, in the UK and the United States, as different forms of philanthropy. The differences in social norms and values that underlie different types of libraries in this respect should not be underestimated. As was seen in the given, traditional definitions of joint use libraries, ambiguity is generally met by agreements that are worked out in such a way that the necessary distinctions are made in ways that clarify the rules for the organization. The rules and regulations are necessary either to establish new, or maintain traditional, norms and values attached to the libraries taking part in the collaboration. In the two Swedish examples, we see different ways of doing this. In Härnösand the establishment of distinctions and rules is effectively encapsulated in the process of formulating a new mission for Sambiblioteket, a mission (partly quoted above) that takes norms and values of all three collaborating libraries into consideration. What is obviously accomplished by this is the creation of a sense of unity between the staff of the different units. Situational definition is made much of in relation to the world outside, the general public, and the variety of user groups expected to visit the new library. The library is presented as something genuinely new that is for the benefit of the local society. From a relatively early stage, the establishment of the library has been directed toward the creation of a positive "aura" with the explicit aim of finding a fitting definition of not only the library but also of Härnösand; it provides a more democratic and locally dynamic character for the town by bringing academics into the democratic public sphere that is traditionally ascribed to the public library.

In Visby the problem of ambiguity is solved in a slightly different way, even though most of the factors mentioned concerning Härnösand are present. The situation in Visby is different primarily in that the distinctions are not as clearly analyzed or described as they are in Härnösand. Together with the fact that the public library was physically moved to a less advantageous place, this gives the impression that the situational analysis was made more explicitly from the perspective of the university college library. It also seems as if the major motive for the new joint use library is not primarily defined in relation to the general public and the various expected user groups but rather in relation to internal needs of the libraries and librarians.

The result, however, from a normative institutional point of view, is somewhat paradoxical when we look at these examples. Almedalsbiblioteket in Visby has a high degree of integration between the different collaborating units, but the result is the creation of an academic library

with enhanced public access. Sambiblioteket in Härnösand has a slightly less formal integration, but it establishes an identity for the new library that goes beyond the three collaborating units in a way that well meets the analysis of institutional change and development in March and Olsen. The character of an eventual new identity for the joint use library is thus dependent on the balance and visibility of the norms and values that underlie the collaborating library units.

CONCLUSION

In the beginning of this article I made the claim that joint use libraries are more complex in terms of institutional identity than is apparent from most definitions, which more or less exclusively focus on administrative aspects of the collaboration between different library units. I hope to have shown that this is the case, both by reference to normative institutional theory and by reference to two Swedish examples of recently established joint use libraries. I have not been able to provide a “yes” or “no” answer to the question whether joint use libraries actually may be regarded as a completely new form of library in the sense that we have seen earlier in history, for example, in monastery libraries, university libraries, and public libraries. Nor was this the point. Jesse Shera’s notion of libraries as agents defined to fit into and fulfill the ideological basis of an institution of “knowledge” gives rise to the question of how to handle a situation when two agents, an academic library and a public library, combine two rather different ideological and normative roles in this process of fulfillment. It is possible to conclude that the affiliation to an institution such as “knowledge” tends to be strongest when a public library, seen by many as more closely affiliated to the institution of politics, adapts to the norms and values of the academic library, which is more in line with the general definition of libraries and librarianship as can be seen in the writings of Shera. It further seems as if, in order to uphold a logic of appropriateness of joint use libraries in relation to contemporary society, it is necessary to make clear distinctions and define the traditional activities of the public library. This is because many aspects of its institutional identity lie side by side with the instrumentality of academic information provision, which it is now politically correct for new libraries in Sweden to identify with under the flag of the “knowledge society.” However, none of the processes and conflicts that are described in this article is given by nature. Instead they are the result of conscious choices by professional participants in the creation of joint use libraries. The normative foundation and the establishment of a logic of appropriateness of joint use libraries are complex issues, and they must be carefully considered and studied within librarianship as well as within future LIS research.

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NOTES

1. The Swedish term *sambibliotek* can be translated as "joint use library." The term has, however, a history with a slightly different meaning. In Björkbom (1953) the term is used to denote collaboration between academic libraries by means of national and international document delivery services; it is colored by a vision of a "world library," where all human knowledge is accessible through your local university library. Björkbom's thoughts on these issues are analyzed by Bäckström (2001). In Härnösand the term *sambibliotek* is used as the name of the actual library. Because of this, I choose to keep the Swedish term when writing about it.
2. "Us versus them, the people versus the elite, workers versus students, the well educated versus the uneducated, the well paid versus the underpaid, and adolescents versus children/elderly. The public library, with its ideological base, has been seen as an institution promoting a more equal society . . . To merge the public library with an institution that only has been granted to a few can feel frightening" (translation by the author).
3. "Sambiblioteket shall be a knowledge center for professionals, students on all levels, entrepreneurs, and the general public. But Sambiblioteket shall also provide environments for quiet and reflection, recreation and talk. There shall be well-developed activities for children and the young, where new experiences in learning are adopted, and where fantasy and creativity are stimulated. It shall of course also fill the requirements on physical environment, technical equipment, and media that are demanded by the physically disabled" (translation by the author). An English presentation of the project was simultaneously published in *Scandinavian Public Library Quarterly* (Gómez, Hultén, & Drehmer 1998b).
4. For more information on Almedalsbiblioteket, Visby, see <http://bibliotek.gotland.se/Bibliotek/almedalen.nsf/dokument?OpenView&RestrictToCategory=1>. For more information on Sambiblioteket, Härnösand, see <http://www.sambiblioteket.bib.mh.se/>.
5. The Swedish cultural policy of 1974 was a manifestation of a will to establish culture as a policy field in its own right. The definition is administratively well defined as consisting of written art, pictorial art, and performing art as well as mass media, voluntary cultural work within clubs, and "free" organizations. Lastly, it also comprises the cultural heritage. The new policy meant that the criticism of commercial culture was emphasized, the cultural environment and activities of children and young adults was focussed, and the inequalities between different regions of Sweden were dealt with.
6. The 1995 revision of the cultural policy from 1974 is more or less an adjustment to a rapidly evolving new society. The high culture that still held supremacy in the 1970s is now a subculture among others, and the attitude toward commercial culture has changed in society as a whole. The diversity of cultural consumption has increased, and demand for quality has been replaced by demand for identity. In the face of this one can still note that the revision of the cultural policy that took place in 1995 is not very large.

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Building the Beginnings of a Beautiful Partnership

KATHY SULLIVAN, WARREN TAYLOR, MARY GRACE BARRICK,
AND ROGER STELK

ABSTRACT

The authors describe the process leading to, and the outcome of, their partnership to build and operate a 76,000 square foot public/community college joint use library. Located in Westminster, Colorado, the College Hill Library serves a population of approximately 70,000 Westminster residents and 6,000 Front Range Community College faculty and staff. The partnership began in 1994 to investigate the feasibility of building the facility, which opened in April 1998 and continues to be successful today. The authors provide information on the main points of the Intergovernmental Agreement to build and operate the facility and relate their experiences during the planning, construction, and initial year of operation of the library. They discuss issues relating to combining staff, automation systems, and collections as well as special challenges in publicizing the library to the community. An update on the current state of the partnership is provided by the current co-directors of the library.

INTRODUCTION

On April 7, 1998, the College Hill Library opened its doors to the public for the first time. This one library facility would serve as the central library for two agencies: the City of Westminster, Colorado, a suburban city of 100,000 located ten miles from Denver, Colorado; and the Westminster campus of Front Range Community College (FRCC), the largest campus of the largest community college in Colorado. Front Range Community College is one of several community colleges making up the Colorado Community College System. The Colorado Community College System serves

more than 117,000 students statewide. Front Range Community College serves more than 23,000 students. The community colleges were established to provide two-year programs and degrees for students.¹

Hopes were high, on Grand Opening day, that the new building would meet the needs of both communities in a way that two, smaller separate buildings would not have been able to do. Several years of working together had established the beginnings of a partnership between the two libraries that would come together in this building, a partnership that could lead to further expansion of library services for students and public library users alike. But the project also had its risks.

Few joint academic/public libraries existed anywhere in the country at the time, and some that had been attempted were later abandoned. The two agencies had many obstacles to overcome, such as different missions, fiscal calendars, sources of funding, policies, personnel rules, and computer systems. So why did the City of Westminster and Front Range Community College undertake such a venture? And, seven years on, has this partnership been a success? We will try to answer these questions from the point of view of the library's customers and staff, and the larger community, as well as from our (Kathy Sullivan and Warren Taylor) own as its administrators for its first six years of operation, with an added update on the last nine months from the two current co-directors of the library, Mary Grace Barrick and Roger Stelk.

When our two parent organizations asked us, as library directors, to evaluate the feasibility of building a joint library, we were intrigued, excited, and a more than a little nervous. Both the college and the city were in desperate need of more library space. The city was then operating two small (approximately 5,000 square feet each) buildings to serve a community that was approaching 100,000 people, with no facility located in the area where most of the population now resided. City officials and library staff had spent several years developing plans to build a new library within a mile of the community college campus, near the geographic center of Westminster. The college had a facilities master plan indicating the need for 45,000 square feet and had already started planning to build a new facility within its main campus building. The funds needed to build a new college library would be provided from the State of Colorado general fund, based on this approved facilities master plan. Funding was limited for both agencies, and neither had the wherewithal to build a library that would serve as the focal point of information and reading for its community.

The idea of a possible joint facility originated with Dr. Tom Gonzales, then FRCC president, and Bill Christopher, then Westminster city manager. The city and college had enjoyed a long relationship of cooperation on mutually beneficial enterprises, for example, building a Performing Arts Center and developing courses in golf course management in conjunction with the city golf courses. FRCC administrators knew of an existing joint

use library in Broward County, Florida, that seemed to be working well.² Library staff were asked to evaluate the idea to see whether it could work in Westminster. The staff knew we were being asked not only to cooperate in the building of a new library but also in a brand new partnership that would interconnect our operations, policies, and services for years to come.

It was exciting to envision a partnership that, by combining our resources, could result in one library building that would provide the full range of public and community college library services for all. But could such a library actually work in reality? How dependent or independent would the two libraries be? Would there be constant conflicts between user groups (for example, college students and preschoolers)? Would the two libraries merge to become one, or function more as next-door neighbors? Could we peacefully coexist, offering complementary services and collections that would enhance each library's own? Or would the new partnership result in never-ending headaches for the managers and animosity between the two staffs? What about parking, and the fact that the college and city are on different fiscal calendars? Should the two collections be integrated or separate? Should the collections use Library of Congress (LC) classification or the Dewey Decimal System, or both? And what kind of computer system would be needed in such a facility?

THE PARTNERSHIP BEGINS

The first step taken to attempt to answer these and other questions was a visit to Broward County, Florida. Broward County and Broward Community College were already operating two joint facilities at the time—the South Regional facility, built ten years before our visit, and the North Regional Facility in Coconut Creek, which had just opened when we visited in the spring of 1995. Front Range Community College and City of Westminster Library staff and administrators, Westminster City Councillors, and the chair of the Westminster Library Board all made the trip to see how well this joint library worked.

All were impressed by how well the community college and public library resources had been combined at the North Regional facility—resulting in a building that was attractive, inviting, and functional for both user groups. The staffs at both the South Regional and North Regional libraries generously shared their Intergovernmental Agreement with us and were candid about the pros and cons of their arrangements. Our delegation returned from this trip much more excited about the potential of a combined library and less nervous about the possible pitfalls. After the Broward visit, several other models were also reviewed, providing a good framework from which to develop a workable model for Front Range Community College and the City of Westminster.

The remainder of that spring and summer was spent in serious negotiation about how the new library would be owned, operated, paid for, and

managed. Careful negotiation was required to resolve more contentious issues such as the ownership, location, and name of the building and the catalog system to be used. Some of the major negotiation points included the following:

- The building would be located on the college campus but would be separate from the main campus building. It would be located to provide easy access from the west parking lot (the one least used by college students), highly visible and identifiable from the main road, and with covered access from the main campus building.
- All public space in the library would be open to use by all.
- The building would be owned by the State of Colorado. The Intergovernmental Agreement granting the city its share of the building would be in effect for fifty years, with a renewal clause if both parties should wish to continue the arrangement beyond that time.
- The college would pay for 60 percent of the cost of building the 76,000 square foot facility and use 60 percent of the building space for its services. The city would pay the remaining 40 percent for its portion of the space.
- The city and college would share equally the cost of an additional parking lot to provide approximately 150 additional parking spaces.
- Each agency would purchase and own furnishings, equipment, and supplies.
- The college would provide building maintenance, utilities, telephone service, security, janitorial services, grounds maintenance, and snow removal and bill the City for 40 percent of the annual cost.
- Each party would budget for, purchase, and manage their own collections.
- The library would be operated with one computer network, to be agreed upon by the two library directors.
- Management of the two library operations would be determined by the two library directors, but with as little duplication of services and functions as possible.
- A plan to dissolve the arrangement was also included in the Intergovernmental Agreement.

THE BUILDING GETS UNDERWAY

In August 1995 the Colorado State Board for Community Colleges and Occupational Education and the Westminster City Council approved an Intergovernmental Agreement to jointly build and operate the library. The college had already hired the architectural firm of Bennett, Wagner, and Grody to begin designing their new space. The city entered into a third-party agreement with the architects to add approximately 30,000 square feet for public library services in a building separated from the main campus build-

ing, and to integrate the building programs of the two entities to provide convenient access to services for both user groups.

After much debate about where to locate a single entrance to the building, the architects proposed a two-story building with two entrances. The lower-level entrance would face the main street in front of the campus, and be accessible from the west parking lot, which was least used by college students. The upper-level entrance would face the main campus building and connect to that building by an enclosed walkway. Given both the size of the building and the desire to provide easy access for both college students and the general public, both parties agreed that this was the best solution.

The architects also designed a long, gently curved wall on the northwest side of the building with large windows, providing a panoramic view of the Rocky Mountains from both levels. On the lower level, a public meeting room, circulation services, the children's library, new books area, audio and videotapes, a small newspaper and magazine browsing area, and large print books were all located close to the entrance. On the upper level, circulation/reserves, the reference desk and collection, the college's nonfiction collection, media services, and the library instruction room would be located close to the upper level entrance, most used by college faculty and students.

Meanwhile, city and college library staff task forces met to discuss whether to integrate the college's nonfiction collection (classified in LC) and the city's more general nonfiction collection (classified in Dewey Decimal). Because there was little subject overlap between the two collections, and considering the cost of a retrospective conversion, the two staffs decided to classify and shelve the nonfiction collections separately but to incorporate all items in one database. All the city's collections were housed on the lower level, with the exception of reference materials purchased by the city, which would be classified using LC and added to the shared reference collection on the second floor.

Other amenities located on the lower level included the Friends of the Library gift shop, five group study rooms accommodating six to ten people each, the Rocky Flats reading room (paid for and staffed by the U.S. Department of Energy), and the Technical Services departments of both libraries, operating side by side. On the upper level were placed administrative offices for both libraries, the Media Center, a large public meeting room, a conference room, five more group study rooms, a distance-learning classroom, and Instructional Services. The lower level was designed as the noisier, popular materials floor, while the upper level was reserved for quieter, more research-oriented use.

The architects met with staff from both libraries to address specific issues related to building design and function. Open access to the whole of the library by all users was the underlying principle that guided our decisions. Any library user could enter the building at either entrance, return and

check out their materials at either circulation desk, reserve a group study room on either floor, and use any of the library's computers (for example, most children preferred to use computers in the children's library, but they were also welcome in the reference area on the second floor). The two large meeting rooms (one on each level) were both open to use by college, city, or other community groups. To facilitate administration of these rooms, a room scheduling software module was purchased jointly by the two agencies, and room rental fees were divided equally.

FUNDRAISING FOR ENHANCEMENTS

As plans for the facility took shape, it became more and more apparent that this exciting facility would be a major asset to the community. The facility would have ample space, state-of-the art equipment, beautiful interior finishes, and lovely views of the mountains. The college and city were also contributing funds for attractive, comfortable furniture, and 1 percent of the project budget was set aside for purchasing art for the building. However, there were still several "wish list" items beyond the budgets of either institution, so a joint fundraising committee was formed.

Westminster is not a particularly affluent community, with no established philanthropic tradition, and the community college had done some fundraising but was still finding its way in this area as well. A realistic goal of \$100,000 was raised, and a list of enhancements generated to get prospective donors excited. The college's development office headed the campaign, and it was agreed that funds would be held in a college account that had already been set up for gifts. The fundraising committee identified opportunities to name rooms for significant contributions (ranging from \$1,000 for a small group study room to \$50,000 for a large meeting room), and a donor wall was planned to acknowledge all contributions both large and small.

Through the combined efforts of college and city community members, \$120,000 was raised by the end of the construction project. These funds were used to provide a beautiful wooden castle-like structure in the middle of the children's library, to commission two large murals for the children's library (painted by local children's author Janet Stevens), and to purchase enhanced student and instructor workstations for the Computer Instruction Room. All individuals, businesses, and organizations were listed on the donor wall, creating a great sense of community pride and ownership in the new library and building excitement about its opening.

AUTOMATION

A major challenge in planning the new library was the choice of an automated system that would serve the needs of both libraries. The two libraries contracted with DNR, a technology-consulting firm based in Chicago. The consultant examined various options, including migrating the

college's data (located on a CARL system) to the city's existing Dynix system (or vice versa), purchasing a new system to serve both entities, or each agency retaining their own separate system. The consultant sent out RFPs to Dynix, CARL, and several other major vendors to determine the costs of each option. As it turned out, the cost of upgrading and expanding the city's Dynix system to include Front Range's holdings was by far the least expensive option, and it met the requirements of both agencies as well as any of the vendors could, so that option was chosen. The city and college shared the cost of the upgrade/expansion and the cost of connecting the new library via a T-1 line to the server, located at the Westminster City Hall. The city later replaced this T-1 line with fiber optic cable, at no cost to the college.

The city library's automation staff, Veronica Smith and Eric Sisler, handled ongoing automation issues. The job descriptions for these two city positions included planning for and managing library automation for both the city and college libraries. In return, FRCC bore responsibility for providing a position to head reference services for both agencies and to provide most of the reference desk staffing. Over the years, the city's automation team worked with both staffs to make annual decisions about shared electronic resources, to write and update Internet policies, and to negotiate the purchase of new technologies such as self-checkout units, an electronic notification system (Dynix Telecirc), and an upgrade from the Dynix to the Horizon integrated library system.

STAFF REACTIONS

Overcoming the concerns of the staff as the project began was something of a challenge for both institutions. Both staffs feared that the joint library would result in their jobs being eliminated. Barring that, they were still concerned that the service ethic, level of expertise, or work methods of the "other" group would be a problem. The old stereotypes about how college librarians and public librarians differ in their approaches to service had to be overcome. College library staff would be facing some new challenges, like learning to work with a new integrated library system (Dynix), dealing with collecting fines for overdue materials, and learning to work with many more children in the building. Similarly, public library staff would need to learn to answer more complicated reference questions, give formal classes in the Library Instruction room, and deal with the unique needs of college students.

As soon as the Intergovernmental Agreement was approved and planning began, staff from both agencies began meeting on a frequent basis on task forces formed to address various operational and policy issues. Both staffs also attended a one-day team building retreat where integrated groups of staff were broken into teams to complete various exercises.

As the two staffs interacted on a regular basis, it became apparent that

they had much more in common than they had previously imagined. The circulation task force found that only a few minor changes needed to be made in order to create consistent loan policies. The loan periods for most items were already quite similar, and the Dynix system was able to specify separate loan periods for unique collections such as College Reserves. The Reference Services task force found more similarities than differences in Internet policies, printer charges, etc. The Interlibrary Loan committee came up with a way to share the work of processing interlibrary loan requests that was easy to understand, efficient, and fair. Library staff were consulted at every step of the process to design and develop the library. By the time the library opened, both staffs had already learned how to work together and felt very comfortable with each other.

In the seven years since the library opened, issues and concerns between the two staff groups have occasionally come up, but not to any greater extent than would normally be expected between different working groups in any library. Staff also learned a great deal from one another and cooperated to better serve children, non-English speakers, and remote users. There were very few times when we, as co-directors, needed to spend time resolving issues among the staff. The biggest challenge for each agency was, and continues to be, identifying developments within each agency that might affect the other agency's staff and communicating those appropriately. As the operation of both libraries is affected by any decisions made, sensitivity is required and the personalities of the two directors can play an important role.

BUILDING ACCESS

One of the most formidable challenges posed by the joint library project was how to make room for the additional vehicles visiting the public library. The parking situation on the college campus varied by the time of year and time of day. During the first few weeks of each semester, all the parking lots regularly filled up, and the college's security force needed to provide parking on grassy areas as well. During most other times, ample parking was available in the west parking lot.

Providing "designated parking" for public library patrons was impossible, because any college student or faculty member could also be a public library patron. To address the additional demand, the two agencies decided instead to jointly fund an additional parking lot on the far northeast side of the campus. This parking lot would provide an additional 150 spaces for college students, faculty, and staff, freeing up 150 parking spaces in the west lot for public library patrons. The new lot was opened just prior to spring semester 1999. Although parking has presented difficulties during the first few weeks of each semester at certain peak hours, the arrangement has been working well the rest of the time.

SPREADING THE WORD

At 76,000 square feet, the College Hill Library would be the largest in the area between Denver and Boulder, Colorado. The size of the project, and its innovative nature, generated excitement in the community. The biggest public relations challenge was to inform the public that the new library really would be a public library open to all, despite its location on the college campus. To that end, we planned a major groundbreaking ceremony and a grand opening day celebration with many children's entertainers, multicultural dance groups, refreshments, and giveaways, to which each agency equally contributed. We highlighted our large and beautiful children's library to send the message that this was definitely more than a college library. We placed a multipage, full-color insert in the local paper and sent extra copies of the insert to all residents who lived within close range of the new library. The City of Westminster's newspaper, *City Edition*, featured stories about the new library in several issues: when the Intergovernmental Agreement was signed; after the groundbreaking; and close to the time of our opening.

After the Grand Opening celebration on April 24, 1998, business began to pick up significantly, and by the time the Westminster Public Library's summer reading program for children started in June, word of the beautiful new children's library had spread. Young families heavily populate the residential areas around the new library, and this fact is reflected in our children's circulation statistics. Excited parents and children found the library first, and word spread from there.

Front Range Community College students and faculty have also made heavy use of the new library since its opening. The additional seating, meeting room, and study spaces have relieved the overcrowding that was a constant problem in the former library. The two libraries' combined reference, periodical, and electronic database collections offer more for the students than either library could have offered on its own. Many students with children are regular users of the children's library, and high school students are using the college's large media collection and reference collection. Less than two years after opening its doors, College Hill celebrated its millionth patron visit, and the two millionth patron milestone was reached after another year had passed.

PROS AND CONS

After seven years of operation, the pluses and minuses of this joint venture are now clear. The facility has been amazingly popular, with checkouts of public library materials alone reaching 1,061,821 for the year 2004. The public library has been able to make regular use of the computer instruction room to offer a variety of classes to the public. The whole range of college and public library materials is available under one roof, and the building

offers much more space and seating for each group during the many times when the building is chiefly used by the public (term breaks and holidays) or by the students/faculty (early mornings). Staff from the two libraries have worked together to sponsor cultural programs, solve problems, and deal with difficult issues such as Internet policies. On an informal basis, collection development staff cooperate in their selection decisions, stretching both agencies' budgets a little farther. Very few problems have come up between the two staffs, and those that have were quickly resolved.

On the negative side, making joint decisions about building maintenance and security expenses can sometimes be tricky because the budget cycles of the two institutions are very different. Scheduling the public meeting rooms has required greater staff involvement and has required more staff time than previously thought. Some decisions can be more complicated because there are more parties involved (for instance, some information technology [IT] decisions can require approval from IT administrators on both sides). But on the whole, the experience of sharing this library has been overwhelmingly positive to date, and staff continue to be committed to making it remain so for many years to come.

AN UPDATE ON COLLEGE HILL

This article concludes with updates from the new college library director and the public library manager, both of whom were new to their posts in 2004.

Observations of the New College Library Director

Beyond the benefit of being able to work in this beautiful facility, another factor in accepting this position was the knowledge that both the public library manager and I would be new to our positions. From my perspective, this unique circumstance would lend itself to a comprehensive examination on our part of the policies and procedures associated with the joint use operation. Knowing that the ongoing success of any library depends upon flexibility, innovation, and a constant reassessment of community needs, this type of analysis will afford us the opportunity to build upon the success of the current arrangement. The monthly meetings scheduled with my counterpart and our respective supervisors underscore this, and it certainly demonstrates the city's and college's commitment to maximizing the effectiveness of this operation.

Of course, one factor that will never change is that the joint use partnership between the city and the college does lead to a certain degree of accommodation on the part of both libraries. As one would suspect, compromise is the mantra of any joint use partnership, and it is routinely developed here to facilitate the different missions of each library as well as the specific needs of its clientele. These compromises can place limits

on the flexibility of each organization, and, at times, may impact the ability of each to focus exclusively on its primary mission. However, on a daily basis our patrons clearly remind us that the pros of this partnership by far outweigh any of the negative consequences.

Update from the New Public Library Manager

Nine months ago, when I took over as the manager for the Public Library side of this joint facility, we faced a challenge. The former manager of the Westminster Public Library had relocated to England, and the director for the Front Range Community College Library had retired the same summer. With this, we lost the informal history of how the staffs had worked together over the years to provide service. There was concern that we had lost the story of our joint facility. Each side of the house had new leaders who needed to learn the unique aspects of their jobs as related to their specific employer.

This newness was combined with the tension of the Westminster Public Library opening a new, very busy branch library. Whereas in the past the College Hill Library had been the primary focal point for staff and services, the new branch library pulled away part of that focus. The shared IT staff—part of our joint operating agreement—now needed to spend a significant part of the year getting the branch library up and running. With so many adjustments to make, our tendency was to revert to an “us” and “them” mentality, leading to a feeling that we were two tenants sharing the same building instead of a joint facility. To ameliorate this sense of drifting from our joint mission, both directors have worked to reinstate some ideas from the early days of the partnership, for example, joint staff meetings, joint meetings to discuss automation issues, and joint adult reference meetings. Additionally, the two managers and our supervisors meet for breakfast once a month to discuss the long-term plans of the city and the college. Plans are in the works to draw up a new joint mission statement, allowing a recycling of sorts, by taking the best from our past and tying it into our future.

NOTE

1. See <http://frontrange.edu> for more information.
2. See <http://www.broward.edu/libraries/index.jsp> and <http://www.broward.edu/libraries/pine/index.jsp> for more information.

Kathy Sullivan is the Area Manager, Cheltenham and Tewkesbury Libraries for Gloucestershire County Libraries in the U.K. Prior to her recent move to the U.K., Kathy was the Library Services Manager for the City of Westminster for 11 years. She received her undergraduate degree from Bowling Green State University, Ohio, and her M.L.S. from the University of Arizona.

Warren Taylor was born and raised in Denver, Colorado, USA. Warren earned a Master of Arts Degree in Library Science from the University of Denver. He also

earned a Master of Arts Degree in Anthropology from the University of Colorado. In addition Warren earned a Ph. D. in Higher Education Administration from the University of Denver. He retired as Director of the Library, Media Center and Center for Instructional Design and Development at Front Range Community College. Prior to that Warren served as Director of Facilities Use, Research and Planning at the Auraria Higher Education Center. Dr. Taylor was the Assistant Director and tenured assistant professor at the Auraria Library and the University of Colorado at Denver. He taught in the School of Business at the University of Colorado at Denver as well as the Computer Information Systems program at Front Range Community College.

Mary Grace Barrick is the Library Manager for the City of Westminster Colorado Libraries. She received her undergraduate degree from the University of Michigan, and her M.S.L.S. from Wayne State University in Detroit. She has worked in Academic, Community College, Medical and Public Libraries.

Roger Stelk is currently the Director of Library Services at Front Range Community College, Westminster CO. Before arriving at the College Hill Library, Stelk worked as the coordinator for collection development at DePaul University, as the director of public services for Hunter Library at Western Carolina University, as the coordinator of the Reference/Information Desk in Love Library at the University of Nebraska-Lincoln, and as a reference librarian/bibliographer for Newman Library at Virginia Tech. Stelk is a member of the American Library Association, the Association for College and Research Libraries, and the Colorado Association of Libraries. He has served on several ALA/ACRL committees and is the co-author of a number of articles on libraries. Stelk has a masters in library and information science from the University of Illinois at Urbana/Champaign as well as a MA and BA from Southern Illinois University-Carbondale.

Changing Places: Personnel Issues of a Joint Use Library in Transition

PATRICIA T. BAUER

ABSTRACT

A field study of a joint use library in transition was undertaken to identify personnel issues that arose when a public library program moved from a middle school setting to a college campus in the same community. Qualitative research methods were employed to collect data that would provide insight into the impact of change in employment status (from school board employees to college employees) and identify implications for staff adopting new work roles, management practices, and training models. The research was a follow-up of the 1995 doctoral dissertation that reported findings of a six-month field study of the combined Azalea Public Branch Library/Azalea Middle School Media Center in St. Petersburg, Florida, "Factors Affecting the Operation of a Combined School/Public Library: A Qualitative Study."

INTRODUCTION

On May 15, 2005, a new joint use library facility opened in Pinellas County, Florida, after more than three years of collaborative planning and development between the city of St. Petersburg and St. Petersburg College. The West St. Petersburg Community Library replaced the Azalea Branch Public Library/Media Center that had operated in a shared facility at the Azalea Middle School for eighteen years. This partnership change came about through the efforts of college leaders and city officials following successful implementation of a public/college joint use program at the Seminole Community Library in the same county. The Seminole collaborative provides library services to community users and St. Petersburg College

students in a library facility operated by employees of the city of Seminole on college property. Although there are significant differences between the Seminole and St. Petersburg Intergovernmental Agreements that set forth provisions of partnership with the college, the first collaborative exemplified the benefits of sharing library space and resources, paving the way for a second joint venture. The following research report specifies personnel issues that arose with dissolution of the Azalea partnership with the School System and transition of school board employees to a college setting. In this report the City of St. Petersburg will often be referred to as the City; College will be used to denote St. Petersburg College; and the Pinellas County School System may be identified as the District or School System.

THE 1995 AZALEA LIBRARY FIELD STUDY

In order to provide context for a story of personnel concerns in a period of dramatic change, the researcher must first provide details of the collaborative partnership as it was before the transition. These details are found in a doctoral dissertation, the report of a qualitative case study of the Azalea Public Branch Library, which identified factors that affected the operation of a combined middle school/public library in densely populated Pinellas County on the Gulf Coast of Florida (Bauer, 1995). The Azalea joint-use facility operated under the leadership of a librarian who acted as manager of the public library branch and worked collaboratively with a school library media specialist employed by the District to run the school media program. The branch was one of six libraries in the St. Petersburg Public Library System, and the system, as a member of the Pinellas Public Library Cooperative, was involved in resource sharing with twenty-four public libraries in the county.

The salaries of all employees of the combined library at Azalea (with the exception of the teacher in the media position) were paid by the St. Petersburg Public Library System but, as School Board employees, all Azalea Library personnel were supervised and evaluated by middle school administrators. This staffing model, one of the provisions of the agreement between the city and the school board when the program was implemented in 1988, was the result of careful consideration by a feasibility study committee under the leadership of the director of the St. Petersburg Public Library System. A change in employment status was possible only through a change in the formal agreement between the city and the school board.

The goal of the six-month field study conducted in spring and summer of 1994 was to provide a comprehensive understanding of the complex reality of a combined school/public library by examining the methods of operation. The researcher used the methods of naturalistic inquiry, which included observations, interviews, focus group meetings, and examination of library documents. Using a "process" framework as defined by Schein (1987, p. 15) meant that the researcher focused on how things were done

rather than what was done. It seemed, therefore, appropriate to use qualitative methodology.

The library was viewed as an agency, "a strategy for performing a complex task which might have been carried out in other ways" (Argyris and Schön, 1978, p. 14). Presenting "slice of life" episodes, the researcher focused on the human processes common to all organizations that make a demonstrable difference to organizational effectiveness in general. These processes are identified by Schein (1987, p. 15) as communication, building and maintaining a group, problem solving, group growth and development, leading and influencing, performance appraisal and giving feedback, and the intergroup processes of cooperation and competition.

In the tradition of naturalistic inquiry, the study took place in a naturally occurring program that had no predetermined course established for the researcher (Patton, 1990, p. 39). Assuming that the best way to study process is to observe it directly, rather than to infer its nature from the known input and the observable output, and using an illumination model, the researcher sought to describe and interpret rather than measure the effectiveness of the combined program. In the spirit of naturalistic inquiry, the observer sought to avoid imposing constraints on outputs. Whatever outputs occurred were collected, analyzed, categorized, and interpreted after the fact (Guba, 1978, p. 3). This discovery of theory from data that is systematically obtained and analyzed is grounded theory. In this discovering of theory, the researcher generated conceptual categories or their properties from evidence, and then the evidence from which the category emerged was used to illustrate the concept (Glaser and Strauss, 1967, p. 110).

The findings of the field study were organized into five major categories, identified as factors affecting the operation of the combined library. Findings within these categories were further divided into themes identified as indicators of these factors. The factors and their related themes were (1) planning, indicated by community readiness, formal agreement, and governance; (2) leadership, indicated by influence and power, leadership style, and program excellence; (3) cooperation, indicated by networking, sharing, and reaching out; (4) community fit, indicated by the facility, customer satisfaction, and interagency articulation; and (5) personnel, indicated by school board status, adaptability, and work roles (Bauer, 1995, p. 97).

A closer review of the findings in the personnel category reveals that the Azalea Library manager had been resilient, adapting to changes in leadership at all levels in public library and school district personnel. She had managed change within her staff by moving present employees up to positions that became open and involving the school principal and branch coordinator in hiring new people. The library manager and her office manager (Library Assistant II) had shared tasks such as preparing reports of library activities, preparing statistics and revenue reports for the main public library, and assembling work schedules and payroll reports. It was

vital to the operation of the combined facility that these duties were shared due to the heavy programming responsibilities and outreach activities of the library manager. It was essential that employees had been willing and able to function in a variety of roles in a library open for fifty-eight hours a week and averaging twenty programs each month. Work roles at the Azalea Library were characterized by flexibility in scheduling, freedom of choice in task assignment, and recognition of special talents of employees. In addition, the manager's commitment to the success of the combined venture and her humanistic leadership style had contributed to stability in the organization and excellence in programming for library users (Bauer, 1995, p. 102).

Data analysis of personnel as a factor in the operation of the Azalea Library illuminated management practices that had been in effect since the opening of the library in 1988. The indicators of school board status, adaptability to change, and cross-functional work roles (that emerged after extensive observations, interviews, document analysis, and focus group meetings in the first study) were assumed to be important organizational characteristics that have continued to affect library operations under a management system unchanged in the past ten years. Therefore, these indicators provided a framework for the current study, which examines the implications for staff adopting new work roles, management practices, and training models.

THE 2005 AZALEA LIBRARY FIELD STUDY

Background

In 2002 the city of St. Petersburg began to consider an end to the collaborative relationship with the school district in response to a proposal from St. Petersburg College to create a joint use facility in a new building on a college campus located in the Azalea neighborhood. While discussions about this change were under way the researcher revisited the Azalea Library to begin a field study to examine the personnel issues that would arise with dissolution of the partnership between the Pinellas County School System and the St. Petersburg Public Library System. The field study employed qualitative methods (as described for the earlier research) including examination of documents; attendance at important meetings during the transition; observations in the Azalea and West St. Petersburg Community Libraries; and interviews with stakeholders.

A document prepared by the College in late 2002 to answer frequently asked questions proposed that the community and the College would receive increased library resources, hours, space, and services from this new partnership. The public library collection of 41,000 volumes would be combined with the college collection of 80,000 volumes, 1,500 periodical

titles, and an array of online databases. This new West St. Petersburg Community Library would have a minimum of 69.5 hours of service weekly (on at least six days), including 4 nights (compared to 48 hours and 2 nights at the Azalea Branch). The new library would be a joint use facility of 50,000 square feet, in comparison to the current facility of 17,000 square feet, with special spaces for children's programming and separate space and services for teens. The new community library would also have separate, small study and conference rooms for quiet study and meetings as well as a large community meeting room complete with the latest technology. Another benefit to library users would be a small café with comfortable seating for leisure reading. In addition, the new partnership would provide for two instructional computer classrooms to be used by both the community and the College, maintained by a staff of computer specialists ("Frequently Asked Questions," 2002).

An Intergovernmental Agreement between the City of St. Petersburg and the Board of Trustees of St. Petersburg College was entered into in January 2003, and the joint use facility was opened in May 2005. The initial term of the agreement is for fifty years with two options to extend the agreement for ten-year periods. The document outlines details for establishment of a joint use facility on college property, administered and operated by the college with participation from the city. In the sections that address library management and staffing, the College is identified as the party primarily responsible for these activities. The College will hire and manage the Community Use staff but will seek the City's input prior to hiring new employees for the Community Use area. The Community Use staff includes the positions paid for by the City; they are considered grant-funded employees by the College (meaning that the funds for their salaries will come from an account established to receive funds from the City) subject to College employment policies and direction ("Intergovernmental Agreement," 2002, p. 9). The agreement does not require that Azalea Branch Library staff make the move to the College, but it offers this option for employees who choose not to remain employees of the Pinellas School Board.

Another important provision of the new agreement is that the College will fill vacancies that occur in any library staff positions, ensuring participation of the City library director in making these decisions while reserving the right to make final decisions in all employment matters of the College. The head librarian of the new joint facility is to be appointed by the College after conferring with the City library director. The head librarian will report to the College library director and the College campus provost and will be responsible for the management and operation of the library, including but not limited to coordinating community activities and services, hiring and evaluation of all library staff, scheduling, training, and development. The head librarian will ensure the participation of the City

library director in hiring and performance evaluations of Community Use staff and in assigning community library duties and responsibilities to the librarians, staff, and faculty of the combined library ("Intergovernmental Agreement," 2002, p. 8). These management provisions set forth major changes in work roles, management practices, and training models for the staff of the Azalea Library.

With the signing of the Intergovernmental Agreement between the College and the City in 2003, a two-year transition process was begun. A date was set for the dissolution of the partnership with Pinellas District Schools and discussions were begun for meeting the terms of the 1987 Azalea agreement relating to this process. As in the case of any school system that gains thousands of new students each year, the District was quite agreeable to the change proposed by the City since the Azalea Middle School would gain use of the entire 17,000 square foot library facility at no cost to the school system.

All Azalea staff members who were former School Board employees paid by the City subsequently elected to become employees of the College in the new West St. Petersburg Community Library, with the exception of one person who retired. Difficult decisions were made over a period of months by everyone involved through careful consideration of the many changes in the work lives of staff. During this uncertain period the Azalea Library manager and other staff attended meetings with School Board, City, and College officials responsible for complying with applicable laws concerning these eight employees in transition. During these sessions the Azalea Library manager, working through her supervisors in the District and City, sought answers to employees' questions concerning changes in their work roles, salaries, benefits, vacation and sick days, schedules, and training. As these and other questions were answered, the researcher, in close collaboration with the Azalea Library manager, gained insight into staffing issues of this combined library that would be transferable to other facilities.

Making the Decision: What Factors Affected the Staff?

It is significant that the employees at Azalea, when given the choice, elected to make the move as a team. They had a combined total of more than seventy-five years of experience in the public school system, but a provision in the partnership gave them the opportunity to weigh the advantages and disadvantages inherent in their employment status with the School System as opposed to the College. The Azalea employees could elect to stay with the District, but they were also guaranteed a position with the College. An obvious advantage in choosing the College over the School System was the ability to continue to work with their colleagues in a public library setting serving familiar clients. Even though they had served in a shared school/public library setting, they truly had focused on Community Use

patrons. Choosing to remain with the School System would have certainly meant assignment to different schools throughout the district in roles to which they were not accustomed and separation from a well-established team focused on providing quality public library programs and services.

With the School System they would have no longer been assured of the twelve-month employment to which they had become accustomed. By moving to the College they would have this assurance. With the School System they had worked 37.5 hours a week, as opposed to 40 hours with the College, but in their new status as College employees they would be in a position to earn time and a half for overtime. This meant that they would earn three hours of compensatory time for every two hours they worked overtime. Another work practice that the Azalea employees considered was that they would no longer be required to work on weekends. The Azalea Library observed Saturday hours and all staff had been on a rotation to work every fifth Sunday at the main St. Petersburg Public Library. Even though some staff might elect to work Saturdays at the College to earn time and a half, it would be their choice. For a staff accustomed to working during school holiday breaks, the fact that the new West Community Library would observe abbreviated hours during College holidays was also considered.

Another attractive aspect of a move to the College was that the sick days staff had accrued in the School System would not be lost and would be rolled over into retirement credit. This was possible because their retirement accounts remained with the state of Florida. On the College salary schedule as library technicians, library paraprofessionals, or library assistants, most received raises, with the notable exception of the Azalea Library manager, who actually took a 16 percent pay cut. (She was near the top of the salary schedule and the only school librarian employed by the District with a twelve-month contract; as such her salary could not be matched by the College faculty salary schedule.) It was important to this librarian nearing retirement that she continue in her management role during this two-year transition period to facilitate the move. She realized that, in order for the public library program to make the transition smoothly, the staff would need her continued guidance and support as Azalea Library manager. She also compared her new work role at the College as children's librarian, primarily responsible for services and outreach to children, to the role of a district school library media specialist and found that her special talents as storyteller and program specialist would best be applied in the new West Community Library. Acknowledging the reality that school media specialists in the district spend a great deal of time managing technology was an important step in decision making by the Azalea manager.

One possibly negative aspect of the move to the College for these experienced library personnel at Azalea was the probationary period of six months required of all new employees. This provision was clearly set forth

in the Intergovernmental Agreement and the staff was informed well in advance that this probationary period applied to them as it would to any new hires at the College.

Impact of a Partnership Change on Work Roles and Practices

Changing Places, Changing Spaces With a move from the Azalea Library to the much larger two-story College facility, with its many rooms designated for the various client groups and services offered, the staff soon realized that their roles would be different out of physical necessity. In their former setting (according to the library manager), "We could see everything going on from the circulation desk." From this central vantage point, which also served as an information desk and a work station, a staff member could easily see who might need help and felt comfortable leaving the desk to give assistance. While these cross-functional practices had worked well for the staff in the Azalea one-room setting, the College partnership presented challenges in defining work roles for scheduling purposes in a much larger, multiroom facility. Community Use staff assigned to the circulation desk are not able to serve information needs of children in the Community Use area of the library because of its location.

In the Azalea facility the manager and her assistant could plan or present programs for children while at the same time supervising other library activities from central vantage points. In the West St. Petersburg Library there are separate rooms for story hours and other children's programs. The new facility offers the advantage of appropriate spaces for service to all user groups, but it demands some adjustments in work practices for a public library team accustomed to multitasking. Presenting programs in a meeting room that is not immediately adjacent to the children's area means that the librarian and her assistant will not be able to monitor the activities of other young library users. More spaces for programming create a demand for more staff to ensure a safe and quality experience for children in the new facility.

In devising a schedule for the Community Use area, the College head librarian determined that a qualified person (meaning a person with a MLS degree) had to be at the information desk at all times. This rule reflects an academic library model where students have the expectation of a staffed information desk. This work practice on its face seemed a practical and reasonable one, but the impact on scheduling of staff was significant. For example, the children's librarian and her assistant are a team whose schedules are in tandem on days when they do programs for children. When they are doing their regularly scheduled programs they are not available to man the information desk, leaving the responsibility for that service to staff members whom the College may not deem to be qualified. In their former library facility, a professional librarian was not always available to

serve information needs of children in the public area of the library when a program was in progress. The College is not willing to allow this. A solution for staffing the information desk in the Community Use area would likely involve a change in definition of who is "qualified."

In their former facility, Azalea employees were accustomed to young adult materials being located in the middle school library adjacent to the centrally located circulation/information desk. Now that the teens have their own room and collection located near the adult collection, serving this user group will require scheduling staff for that area. Even though a separate and distinct space apart from the children's department is preferred by both librarians and teens, serving and supervising this client group in the College library will involve a more departmental approach rather than the cross-functional approach used in the past.

Another new work role anticipated by the Community Use staff involves the supervision of unattended children of College employees and those of College students taking classes or using the campus library. An unintended consequence of the City's library policy that all children over the age of seven may use library facilities and attend children's programs without a caregiver may be the reason for an increase in this user group. The two-story design of the library may also contribute to the "unattended child" problem since most college materials are located upstairs while the children's area is downstairs. The College students, some of whom are childhood education majors who will require assistance in selection and use of materials for their courses, represent another new user group for the former Azalea staff. In the early days of operation, the Community Use/children's librarian found herself relocating college students who were accessing the Internet on computers designated for children's use. (In order to better serve children and discourage College students from inappropriate use of the children's area, Internet access was subsequently disabled on these computers.) Serving academic clients' programmatic needs will offer Community Use staff the opportunity to gain new perspectives of the collection and develop skills in serving different client groups.

With the change to a work environment due to a departmental approach to assignment of duties, the staff must become accustomed to having more than one boss. The head librarian, the Community Use librarian/children's librarian, and the circulation manager will be collaboratively making decisions regarding their work assignments and schedules. The director of St. Petersburg College Libraries was very clear in expressing her plan for how the Community Use employees would work with the College library staff. The former Azalea staff will be viewed not as a team of public librarians but as individual members of the College library staff to be assigned as needed to serve library users in various spaces and departments of the West Community Library.

With the increased hours of operation and more library users, the need for more Community Use personnel is quite likely. The Intergovernmental Agreement provides that, "Even though the College shall have the final decision-making authority in all employment matters the City will provide staffing budget increases for additional staff for the Community Use areas of the library if use by the community indicates the need" ("Intergovernmental Agreement," 2002, p. 9). Serving alongside these new colleagues and developing collaborative work relations could result in major changes in established work practices of this staff in transition.

The Effects of New Management Practices With a change in partners, the staff at Azalea gained a new boss, the College head librarian at West Community Library, who reports to the director of libraries for St. Petersburg College and also attends management meetings of the public library system. The transition to the new facility provided "critical incidents" that illuminated inherent difficulties of a change in leadership for the both the Azalea manager and her staff of eight. The Community Use staff had been accustomed to working closely with the person who created work and vacation schedules, assigned work roles, and supervised and evaluated them. The Azalea library manager's new title, children's librarian, as designated by the College, indicated that she would be reporting to the head librarian and that she had been relieved of these management duties. However, the director of public libraries in St. Petersburg referred to the former Azalea manager as the "Community Use Librarian," in keeping with the language of the Intergovernmental Agreement (2002, p. 8), and made her responsible for all aspects of the move of public library materials to the new facility. In response to a newspaper reporter's question, the former Azalea manager said, "I am the Community Use/Children's Librarian" (Wilson, 2005). Herein lay the difficulty: the public library director looked at the Azalea manager and saw her continuing in the role of overseeing the public library area and delivering services to the community users, while the College head librarian saw her as children's librarian in the Community Use area.

An incident illustrating the difficulties inherent in the dual titles for the Azalea manager's new role took place during the planning phase for the move. The Azalea manager assessed her collection of children's books and realized that the number of bins that had been ordered for shelving the materials was inadequate. Even though the West Library's new children's librarian was in charge of the process of moving the collection, the College had not involved her in ordering the library furniture. The Intergovernmental Agreement stipulates that the College, in coordination with the City, would be responsible for the design, planning, purchase, and installation of furnishings, fixtures, and equipment for the new facility (2002, p. 6). Apparently, leaving the Azalea library manager out of the loop in planning for furnishing the Community Use area was not in the best interest of a smooth transition.

Another occurrence, involving inadequate shelving for the adult collection, confirmed this fact. When it became evident that there was no room for shelving new acquisitions of adult books in the Community Use area, the Azalea manager (the person responsible for moving the collection) discussed this with a member of the College library staff. The College librarian replied that the Community Use collection need not duplicate popular fiction held in the College collection and suggested that selection and acquisition of these materials would probably be done by the College and shelved in the College collection upstairs. Another College librarian implied that the City would retain these roles in collection development of adult materials, demonstrating that procedures for implementing policies that call for collaboration in collection development were not clear to staff in the early days of the partnership. The Azalea library manager also expressed some concerns about sending adult patrons upstairs to the college collection for their materials. This was understandable since her role at the former location had not required her to send patrons out of sight to retrieve materials. Working in a new facility requires learning new ways to serve patrons, and making decisions regarding acquisition and shelving of adult materials may prove to be an opportunity for learning collaborative work practices. A stipulation of the Intergovernmental Agreement stating that acquisition of new materials and resources to serve the College and community will be coordinated by the College and City to avoid unnecessary duplication (2002, p. 10) is an indicator that this collaboration will take place.

One of the most surprising of the "critical incidents" for the Azalea library manager during the transition to the College occurred when she was asked to give up her City-issued Visa card and a petty cash account that she accessed to buy materials for children's programs and services. She also learned that the City would no longer be paying mileage for her travel to do outreach in local schools and recreational facilities. As the Community Use librarian, she had assumed the city would continue funding her programs and services. A provision of the partnership agreement spelled out that the City and the College would each provide annual funding for Library materials and resources and that the City's annual minimum of \$50,000 would be used for materials and resources for community users (Intergovernmental Agreement, 2002, p. 9). As children's librarian in the new West St. Petersburg Community Library, the former Azalea manager continues to attend meetings of the managers of the branch libraries of the St. Petersburg Public Library System. It is in this role that she may clarify how procedures such as purchasing program materials will be handled. At this writing, she had directions from the City that she should discuss this matter with the College, as the City would no longer pay operational expenses as in the former partnership.

Perhaps the greatest challenge of all for the former Azalea library man-

ager was letting go of a very important management role—that of scheduling employees. The Azalea schedule had been the collaborative effort of the library manager and her office assistant, but this complex chore became the responsibility of the West Community Library head librarian. In the early days of the new collaboration it was evident that preparing the work schedule required special knowledge of public library work roles and practices unfamiliar to the college librarians. An excellent example of this is an incident regarding preparation of an opening-day schedule. The children's librarian was scheduled to train an adjunct librarian (who would be working Saturdays in the Community Use area) at the same time that she would be doing outreach programs in nearby public elementary schools to publicize the summer reading program. The College head librarian, responsible for scheduling all faculty, had no knowledge of a prior commitment of the Azalea manager to make these school visits on the day prior to the last day of the school term. The new children's librarian carefully prepared a schedule showing her obligations, which included outreach, children's programs on Tuesday and Wednesday, and monthly mother/daughter and adult book discussions. This calendar, along with information about the importance of retaining the team approach for children's programs, enabled the College head librarian to begin to make sense of the complex assignment of creating a schedule whereby the information desk in the Community Use area could be staffed at all times with qualified personnel. Since the work schedule for staff (other than faculty) is the responsibility of the circulation manager, members of the two-person team that presents programs for children had schedules created separately by two different managers. This complicated an already intricate task.

It became evident that collaborating with the Community Use staff to create the work schedule would ensure the continuation of excellent programming and services for all user groups. To address the need for qualified Saturday staff, the head college librarian asked the children's librarian to contact the school system regarding school media specialists who might be interested in adjunct work, preferably for twenty hours a week to cover some evenings as well as Saturdays. A media specialist recently retired from a nearby school was identified, but this librarian's name was provided by the director of School Library Media/Technology with some reluctance, demonstrating, perhaps, that she was not eager to provide information that might lead to the district's losing any more library personnel to the College.

In the early days of operation of the joint use facility, several adjunct librarians were hired to cover week nights and Saturdays in the Community Use area, providing children and adult users with assistance. These hours represent timeframes when children and their caregivers can attend together to avail themselves of library services and programs. The former Azalea employees were accustomed to working flexible hours in order to offer the same quality of customer service on evenings and weekends as during

the regular work day. Providing extended access of 69.5 hours a week in the new facility by hiring adjunct librarians is a viable solution so long as they receive essential staff development. The new Community Use/children's librarian found herself in the position of being responsible for this training, which began immediately after West Community Library opened.

Training for the Transition A consultant from the College Center for Library Automation (CCLA), who was responsible for linking the automation systems of the City and the College, explained that the City wanted to retain a separate collection and automation system (and the Dewey Decimal classification of their materials) so that library materials at the College branch could be easily searched by the patrons throughout the St. Petersburg System and the Pinellas Public Library Cooperative. Terms of the Intergovernmental Agreement in the section addressing circulation systems specify that the College will provide training in use of the various operation and management modules (2002, p. 11). The director of St. Petersburg College Libraries (a system comprised of six libraries on campuses throughout Pinellas County) emphasized the fact that she expected all staff to serve Community Use and College students, employing an integrated work model. She suggested that the joint use program's customer service policies stipulate that all library employees serve all client groups. Therefore, moving the public library program to a college/public joint facility entailed creating a plan for training the Azalea staff in the College automation system, Library Information Network for Community Colleges (LINCC); Library of Congress Cataloging (LC); and use of computers that would enable staff to toggle back and forth between the public library automation system (Polaris) and LINCC as they serve community and college patrons. To receive a certificate in the LC classification system, staff must successfully complete modules of a software program, and they may access Web-based training for LINCC from the College Center for Library Automation. Azalea staff were encouraged to complete this important orientation prior to opening day in order to provide quality customer service. Employees of the new joint use library were expected to be adept in accessing materials in two distinct systems so that they could help patrons become familiar with the new OPAC that features both Polaris and LINCC.

The circulation manager of the new library set up basic training that involved a crash course (two to three hours) in working the circulation desk that serves both public and college patrons, and she devised a plan whereby every new staff member would have an experienced college partner when they worked circulation in their first six weeks on the job. In view of the fact that all college staff must become familiar with the public library circulation system, one might wonder if there will also be training in the Dewey Decimal System. The circulation manager indicated that new staff would also have technology training and orientation in serials acquisition.

Training employees to work at a circulation desk where they will be

required to serve different client groups means not only developing their ability to find patron records in the distinct systems but also their ability to recognize and appreciate the needs of both community and College users. College students seeking required reading materials for coursework are subject to different policies regarding the number of books on a particular subject a patron is allowed to check out. Implementing policies that draw such distinctions may prove challenging for Community Use staff that had not done so in the middle school setting. Students at their former joint use facility who had public library cards became public patrons when the last bell rang at the end of the school day, and circulation staff did not treat them as distinct from any other user group in the community. Working with their new colleagues, who are accustomed to serving college students' needs at the circulation desk, will provide an opportunity for professional growth for the Community Use employees.

SUMMARY AND CONCLUSIONS

This report of personnel issues of a joint use library in transition, while not exhaustive in its coverage, offers insights that could guide planners of future collaborative ventures, particularly those considering a change in partnership. Employment issues that emerged during the transition period for new members of the West Community Library staff can be divided into three categories: work roles, management practices, and training models. Work roles were impacted by the design of the Community Use space in the new facility, more diverse client groups, and longer hours of operation. Management practices that brought changes for former Azalea employees involved operating under a new chain of command and adopting a departmental mode for assignment of duties and scheduling. Training models that required adjustments for staff included use of technology for learning new skills, partnering with college mentors, and, most importantly, intensive on-the-job staff development. These personnel matters reflect concerns that, in some cases, were anticipated and addressed in the formal agreement and, in other cases, handled as they arose. Dealing with employment issues of a staff in transition required not only a document to guide the change but also close collaboration of partners eager to make concessions for the benefit of users of the joint program. The City of St. Petersburg and St. Petersburg College, in their desire to provide convenient and improved library service to citizens in the Azalea service area and all areas of the city, made mutual promises that included specifics of how the joint use facility would be managed. The Intergovernmental Agreement proved to be a detailed guide for operation of the combined college/public library that also provided some room for interpretation by those charged with implementation of the policies and procedures it set forth. As in the case of other successful joint ventures, it is through the process of reconciling

differences in these interpretations that the collaborators will become true partners.

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Health Libraries as Joint Use Libraries: Serving Medical Practitioners and Students

LINDA DORRINGTON

ABSTRACT

Libraries, whether medical or healthcare, in higher education (HE) institutions or the National Health Service (NHS), provide services to all types of healthcare students and professionals. Many of these are delivered through contracts, in the form of service-level agreements, between the two key organizations. The challenge to librarians is ensuring that users are provided with access to the resources they need and the skills to use those resources to the benefit of a patient-centered environment. External drivers such as developments in education, a continuously modernizing health service, and new technology have influenced the development of services. Issues regarding the access to electronic information for the different user groups still exist. Librarians have to support the differing user groups, who may have varying levels of computer and library skills, and provide skills training on a wide variety of resources from their own institution and from nationally provided content.

INTRODUCTION

The dual use of health libraries by practitioners and students has been a recognized practice going back many years, although there is very little documentation to support it. What there is often describes the establishment of multidisciplinary library services in UK National Health Service (NHS) Trust hospitals, such as that described by Sue Childs (1996), or partnership arrangements between higher education (HE) institutions and NHS Trusts (Black and Bury, 2004).

Health professionals, both clinical and nonclinical, whether practitioners or students, require access to library and information services through-

out their education, training, and continuing professional development. These services are primarily provided by libraries in the health care and higher education sectors. The changes that have taken place, many of which are still ongoing, in the NHS and in healthcare education in the UK have made major impacts on libraries and on the services they deliver and have raised the expectations of their users.

Medical and other staffs working in the NHS require access to libraries for their day-to-day work, for educational purposes, for research, and for the planning of services. Many professions working in the health service are required to attain further skills and qualifications for career advance. The NHS also undertakes a great deal of primary research, independently or in collaboration with higher education. Information is also essential for management decision making, with the current emphasis on clinical governance.

The education of health professionals primarily takes place within the higher education sector but relies heavily on the NHS for the practical aspects, whereby clinicians often deliver training and students observe and practice. Healthcare education has seen a fundamental change in recent years following the transfer of nurse education into the academic sector, where students can take either a diploma or degree course, lasting three and four years respectively, to qualify as a nurse. Education is provided by universities, with placements in local hospital and community settings. The course is 50 percent practical and 50 percent theoretical. A Common Foundation Programme is followed by a chosen speciality in adult, children's, mental health, or learning disability nursing. Midwifery education is also provided at diploma or degree level, and allied health professionals such as physiotherapists and radiographers follow similar courses. All these students at various stages of their placements will use the libraries of the hospitals to which they are attached.

RECENT CHANGES IN THE EDUCATION OF HEALTH PROFESSIONALS

The education of nurses has seen profound changes. "Project 2000" (UKCC on Nursing Midwifery and Health Visiting, 1987) was introduced in the 1990s to give nurse education a higher academic content resulting in a new diploma to replace the old State Registered Nurse (SRN) and State Enrolled Nurse (SEN) qualifications. This required an amalgamation of small schools of nursing into fewer, but larger, institutions, often in liaison with existing polytechnics. The change from polytechnics to universities in 1992 embedded nurse education more firmly within higher education. It thus became a degree-based profession with training commissioned by Strategic Health Authorities (SHAs), and a portion of the course is based within NHS hospitals. The most recent changes followed the publication of the UK government report *Making a Difference* (Department of Health,

1999), which outlines the government's strategic intentions for nursing, midwifery, and health. One aim was to strengthen nurse education and training. The effects of this change were reviewed by the University Health Sciences Librarians group in a report whose recommendations include that "Library staff from the HE and NHS sectors should work together to ensure adequate library provision for nursing students and those that work with them, at Trust level" and that "Workforce Development Confederations should work with NHS and HE library staff to facilitate and where necessary ensure funding for collaborative working" (Walton, Wakeham, & Gannon-Leary, 2002).

These changes caused other librarians working in both the HE sector and the NHS to be concerned that barriers were being created, so in 2000 the British Library funded a research project to look at cross-sectoral collaboration between the NHS and HE in the field of health care. The aim of the project was "to develop a model which would offer an integrated approach for improving inter-sectoral co-operation in the NHS and higher education sectors to improve access to library and information services for health professionals and students" (Childs & Banwell, 2001, p. 15). It concluded that the hybrid library should provide access to electronic and print resources and physical space for study and use of information technology (IT).

The education of doctors is a continuous process. Medical school courses normally last five years, or four for graduate entrants and a year as pre-registration house officers. This is followed by training in the particular speciality chosen by the doctor. The latest developments in undergraduate medical education and the introduction of new curricula followed the publication in 1993 of *Tomorrow's Doctors* (General Medical Council, 2003). This was subsequently revised and laid the foundation for a fundamental change in the way medical students were to be taught, with the emphasis shifting from the acquisition of knowledge to the learning process, including the development of skills to communicate effectively with patients. The emphasis in curricula on problem-based learning (PBL) and informatics has meant libraries also need to review the way they deliver information skills training. A survey conducted amongst medical school librarians concluded that they are likely to be more heavily involved in both the planning and teaching process (Murphy, 2000). It is necessary to teach basic information retrieval skills to enable students to locate and access the material they use in the problem-based case studies that begin in the first year and continue in most curricula until the fourth or fifth years. Current challenges include the need for students to be able to search for, appraise, and use the best available evidence, including the ever-expanding resources available on the Internet.

Following the publication of *Tomorrow's Doctors*, UK medical schools have been reviewing their curricula, their learning resources, and their teaching

methods to ensure they meet the General Medical Council's demands. A shortage of doctors in the UK has been met by an increase in student numbers, either by a rise in the student intake at established medical schools or by creating new medical schools such as the Peninsular and Brighton and Sussex medical schools (HEFCE, 2001). In other parts of the UK, joint medical schools have been established with existing institutions, such as Newcastle/Durham (Harbord & MacFarlane, 2002) and York/Hull.

CHANGES IN NHS STRUCTURES

The NHS has not stood still either. Continuing reorganization has seen the structure of library provision change, expand, and move toward a service provided both locally and nationally. The establishment and expansion of postgraduate medical centers in the 1960s and 1970s led to the development of regional library networks. Today the network, based on Strategic Health Authorities, coordinates NHS library services throughout England. Since the mid-1990s a number of government reports and strategies have been published, starting with *Working for Patients* (Department of Health, 1989) and followed by *The National Health Service: A Service with Ambitions* (Department of Health, 1996), *The New NHS: Modern, Dependable* (Department of Health, 1997), *Information for Health* (Department of Health, 1998), *Health Service of all the Talents* (Department of Health, 2000), *Building the Information Core* (Department of Health, 2001), *Funding Learning and Development for the Healthcare Workforce* (Department of Health, 2002a) and *Making Information Count* (Department of Health, 2002b). Although not explicitly, these reports have been important drivers in influencing the context in which library services are provided, especially in supporting clinical governance and evidence-based practice. For libraries the 1997 Health Service Guidelines (NHS Executive, 1997) for Library and Information Services laid down the key concepts that are a "key resource for clinical effectiveness, for research and for training and education."

Without doubt one of the most important developments has been the emphasis in healthcare on evidence-based decision making, supported and promoted by government policy. It has led to librarians reviewing their role in information handling and information skills, especially to support systematic reviews and critical appraisal (Palmer, 1996, 2000).

THE LIBRARY AND ITS USERS

Within the higher education context, the key groups of users of medical libraries are undergraduate medical students, taught course and research students undertaking master's and doctorate programs, and academic research and teaching staff, all of whom will be members of their respective institutions. In addition, there will also be students on placement, the biggest group being nurses, who are attached to an NHS Trust for the practical element of their course but members of another higher education institu-

tion, and all the staff of the associated NHS Trust—doctors, nurses, allied health professionals, management, and support staff. In addition there will also be staff from other local Primary Care and Mental Health Trusts. In NHS libraries the groups are very similar, with the NHS staff belonging to the parent organization and students on placement, including medical students.

Library Funding

Funding for health libraries is still a complex issue. Higher education institutions are funded through the Higher Education Funding Councils (HEFCE) with additional funding for research-based libraries to facilitate access for postgraduate students and other research staff. NHS libraries are funded through their Strategic Health Authorities through MADEL (Medical and Dental Education Levy) and NMET (Non-Medical Education and Training) levies. In addition, trusts that support undergraduate medical students receive SIFT (Service Increment for Teaching) funding from academic institutions, although in the past it was often not clear if any of this funding was included in library allocations.

Academic libraries that provide library services to the NHS are usually funded through contracts between the parent institution and its associated NHS Workforce Development Confederation. A recent survey undertaken by SCONUL's (Society of College, National and University Libraries) Advisory Committee on Health Services (2003) reveals that nearly half of the contracts were negotiated without direct involvement of the library; the range of the value of contracts is great; and a significant number of contracts are based on service-level agreements. A service-level agreement will specify the type and level of service to be provided and which groups of NHS staff it covers. The survey found that many contracts were for three or fewer years.

Resources

The new curricula developed by medical schools have meant librarians are rethinking their approach to the provision of resources. Student numbers are large; for example, Imperial College London's annual intake is 326. With the course taking six years, the total medical student body numbers nearly 2,000. Textbooks are still an integral requirement, and Imperial has refined its annual call for reading lists to ensure lists are submitted, core texts are correctly identified, and the requisite number of individual titles purchased. The inclusion of problem-based learning cases as part of the course requires students to use a wide range of materials—textbooks, journal articles, and Web sites. The material has to be available for the period the case is being studied; therefore, it is essential for a system to be in place so that students have easy access to it.

The use of the physical library by research staff is decreasing, as more of the library resources they use are being made available electronically.

Substantial investment is being made in the purchase of electronic journals to provide access to current and archival material. Academic libraries spend a large proportion of their annual budgets on these purchases. Until the introduction of networked electronic resources, as far as possible the majority of users registered with a medical library were given equal status and access. However, the transition to the electronic environment has raised a number of issues regarding access. The majority of publishers' licenses for their products allow remote access by members of the institution, which has purchased the product, and walk-in access for nonmembers. This has led to a two-tier system whereby NHS staff have to visit the library to access electronic resources and may not be able to access products that do not allow walk-in access. In some cases to enable NHS users to have remote access to core material, libraries have purchased e-resources for specific user groups. The issue of nonacademic staff using the academic network is largely resolved. What still requires a solution is remote access by NHS users to academic resources. At present the two communication networks, NHSNet and JANET, do not allow two-way traffic between them. A common solution is for an academic working in an NHS environment to have two computers, one for each network.

One notable difference of library use between academic users and healthcare practitioners is the latter's continuing use of print resources. Whereas major academic libraries are providing a large proportion of journals in electronic full-text, the provision of print titles is still required in libraries serving medical and healthcare staff.

A fundamental change to the provision of information to the healthcare profession started with the establishment of the National Electronic Library for Health. In 1998 the NHS Executive published its new information strategy, *Information for Health* (Department of Health, 1998). The strategy set out national plans and targets for using current and developing information and communication technologies locally to achieve better and more consistent patient care (Fraser, 1999). It also announced the creation of the National Electronic Library for Health. This was reemphasized in *Building the Information Core*, which states:

The NHS must be a major provider of information services in support of care services, working with carefully selected partners to provide a range of information to patients, clinicians and others . . . The public and NHS staff will be able to access information on local care services and how best to use them through nhs.uk and evidence-based information and clinical guidelines through the National Electronic Library for Health (NeLH). (Department of Health, 2001, p. 4)

Amongst the resources it provides access to are a number of core databases such as Cochrane and PubMed.

In 2002, the health service librarians group Library and Knowledge Development Network (LKDN) established a working group to look at the

feasibility of purchasing a number of databases and full-text journals for the NHS libraries in England. This led to a project to establish the National Core Content Collection, and bids were submitted from a number of major suppliers. Dialog was chosen as the provider of databases and ProQuest as the provider of full-text journals. Thus, there are now two key resource groups—one provided by the academic institution and the other by the National Core Content. A similar consortial purchasing initiative in Scotland has led to the establishment of the NHS Glasgow e-Library (Davies & Wales, 2001). In an ideal world, all healthcare students, whether doctors, nurses, or allied health professionals, would use the same resource platforms from the start of their education and then throughout their working lives. At the time of writing there is no academic institution in the UK that has bought into the National Core Content. This is a key issue for academic medical librarians. They have to provide information literacy skills training to undergraduate medical students and to NHS staff, and provide support for students on placement, often using different versions of core databases.

This has implications for the training that the library staff have to undertake for themselves in order to gain the knowledge and experience needed to teach in information skills programs. Another outcome is that several of the resources are duplicated. This dual provision and noninteroperability of the two networks has long been recognized as a barrier to the equity of library user entitlements, and in 2001 the NHS/HE Forum was established to review this situation. The forum itself concentrated on identifying technical solutions to access problems between two networks, and in 2004 a Joint Information Systems Committee (JISC) funded post was created to implement the solutions. A subgroup of the forum was established to look at content. In 2002 the Content Group commissioned a study “to explore existing barriers [in the areas of funding transparency, eligibility to use resources and access, copyright and licensing issues, and administrative complexities] to seamless library and knowledge services across the NHS and HEIs and to recommend solutions, courses of action and pilot projects to improve knowledge access and encourage best value in both sectors” (Thornhill, 2003, p. 4).

The outcome is the report *Users First: Removing Barriers to Knowledge Access Across HE and the NHS* (Thornhill, 2003). It made ten recommendations and suggestions for further projects. Two of these projects have been scoped: one a user needs analysis for the UK NHS and NHS-HE interface, and the other an information literacy curriculum for users of NHS and HE library and knowledge services, for which funding is being sought to take work forward. A positive development has been the establishment of a Joint NHS-HE Procurement Group by JISC, whose goal is to procure one common piece of content jointly across the NHS-HE using a common license; negotiations are currently taking place with two publishers. The work of the forum and the Content Group highlights the need to build

relationships with funders, government departments, and NHS and HE stakeholder communities.

Provision for NHS users will vary depending on the type of institution providing the service. Trust libraries, the successor to postgraduate medical libraries, based within a hospital, will structure their services and resources to meet the needs of their users. Those who have contracts to support undergraduate medical education also have an obligation to provide basic resources such as core textbooks. This requires collaboration with the associated medical school library to ensure exchange of information in such areas as reading lists, teaching material, and information literacy support. At Imperial College this is achieved through regular communication between the team leader (medicine) and the librarians of the associated trust libraries in West London in the form of regular meetings and an annual meeting of the senior medical and trust librarians.

Services

With such diverse groups of users, library services need to be tailored to individual needs and expectations. Libraries provide the traditional services—loans, interlibrary loans, document delivery, and photocopying. There may be differing allowances or charges depending on user group, but where possible all users are treated equally.

Today greater emphasis is placed on ensuring library users are able to make full use of library resources. Promotion and marketing of library services is a key first step using a variety of methods, from well-designed library Web sites, to promotional leaflets and posters, drop-in sessions, induction talks, library open days, and a stall at freshers fairs. In November 2004 the first National Health Libraries week was run to promote library services to NHS staff, with many libraries undertaking innovative initiatives.

One area that is the most developed in medical and healthcare libraries is the provision of user education. Medicine and health have been well served for many years with bibliographic databases and more recently with electronic full-text journals, electronic books, and Internet resources. These do not come from just one provider but from many, so the challenge for librarians is to provide users with the skills not only to be able to search resources but to determine which one is best for their specific enquiry and how to evaluate the content. Librarians are also major supporters of evidence-based practice, assisting clinicians and others to make optimum use of information (Palmer, 2000).

The challenge for medical librarians in higher education who are involved in delivering skills training through information literacy programs is the range and depth of training they must provide for the different user groups, from new medical undergraduate students who are familiar with computers and the Internet but not library resources, to healthcare students and workers who many not be computer literate or familiar with

the Internet, to clinicians with very specific patient-centered demands, to research staff who require exhaustive literature searches. Library staff have to be knowledgeable and expert in using not only the resources provided by their own institution but also the resources within the National Core Content and the Internet. Recent developments in Web-based support for learning to use software such as WebCT and Blackboard are providing libraries with new methods of delivering and supporting information literacy programs. The introduction of library portals, it is hoped, will encourage users to make better use of library resources and not to rely on generic search engines such as Google to find information.

THE FUTURE

It is difficult to predict with any certainty what will be the next areas of development, but it is inevitable that joint use of health libraries will continue to develop. The issue of connectivity—removing the barriers as indicated in the *Users First* report (Thornhill, 2003)—is high on the agenda for both the NHS and HE, as is having licenses to electronic resources with the same access rights for both user groups. Outreach programs and clinical librarianship in the NHS are gathering momentum but as yet are not well developed in the HE environment. Libraries in both sectors are creating literacy skills modules to support student learning. HE is embracing e-learning based on interactive learning programs using software such as WebCT or Blackboard, and within the NHS there are plans to continue some of the initial work undertaken by the NHS University, which provides learning and development opportunities for everyone working in health and social care. The concept of the hybrid library will continue. Libraries in the higher education sector are developing new services to offer seamless access such as library portals using proprietary software, whereby a library's electronic resources can be searched using a single interface. As part of the new National Library for Health, which will develop an integrated library service for the NHS, work is ongoing on a single search engine for the electronic resources currently provided through the National Electronic Library for Health.

Developments in both the NHS and HE, therefore, will impact health libraries in the future as they have done in the past. Staff working in these joint use libraries need to take account of new initiatives and direction in both sectors in order to serve their two key user groups equally effectively.

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Organizing Electronic Information to Serve the Needs of Health Practitioners and Consumers

EVE-MARIE LACROIX AND JOYCE E. B. BACKUS

ABSTRACT

From its beginnings as the Library of the Army Surgeon General to today's Internet-driven information environment, the U.S. National Library of Medicine (NLM) has served a variety of audiences. As NLM strives to provide the best possible service to health scientists and consumers, the form of that service has changed depending on resources available and the state of technology. Throughout its history, NLM has adopted innovative programs and technology at the earliest sensible moment that would serve its patron needs. Today, NLM is a leader in providing electronic biomedical information to health professionals, researchers, the public, and anyone else with access to the Internet. These services have evolved in response to available technology and the demands of the various audiences, from clinicians to consumers. To serve the needs of this variety of patrons, NLM connects health information resources in ways that enable each audience to find the information appropriate to its need. NLM continues to improve this organization as the demand and technology and resources allow.

SERVING LIBRARIANS AND PHYSICIANS BEFORE THE ELECTRONIC AGE

The National Library of Medicine (NLM) began in 1836 as the Library of the Army Surgeon General, serving military physicians through the U.S. Civil War period. In the 1870s, under the stewardship of John Shaw Billings, the library, located in Washington, D.C., was opened to the entire medical profession Monday through Saturday (Miles, 1982, p. 91). Shortly after the Civil War, Billings began to loan books and journals to local medi-

cal officers, and by 1874 he had put in place a written policy for lending materials, through the postal service, to those who could not come to the library. He would lend books for two weeks to a medical society or librarian who assumed responsibility for the materials, allowing their use within the organization's library or reading room only. This requesting organization was to mail them back in good condition and to deposit enough money to pay for any lost materials (Miles, 1982, p. 100). This early service was not electronic, of course, but it still served the need of delivering medical information to remote clinicians and researchers who needed it, without them traveling to the library.

By 1911, NLM's interlibrary loans and personal loans totaled 7,500 per year, filling an important gap, as no other medical library in the United States sent out books on loan (Miles, 1982, p. 202). For the next forty years, the library continued to lend materials locally and to clinicians throughout the country, responding to a growing demand. Though there were many medical libraries in the United States, and cooperative arrangements existed, collections in these libraries were judged inadequate to meet the demand. The Medical Library Assistance Act of 1965 (MLAA) authorized NLM to provide grant funding to medical libraries to improve their collections, facilities, and services. Establishment of the Regional Medical Library (RML) Network in 1967 marked a major change in NLM's role from being a central source for medical information to serving as a comprehensive backup resource to a hierarchical RML Network made up of 11 geographically dispersed regional libraries, 100 academic medical libraries, and some 500–600 hospital and other local health libraries (Bunting, 1987, p. 9). NLM itself served the Mid-Atlantic Regional Library. The major services to be provided by the RML libraries were “free loans of library materials to qualified users” as well as literature search services of NLM's MEDLARS batch retrieval system and backup reference support to other libraries in the region (Bunting, 1987, p. 7). Libraries provided document delivery services for free until 1978, when the high demand for interlibrary loan forced the RML Network to institute a standard charge of \$5.00 per loan. By establishing this network, NLM was able to effectively serve the health professional audiences through their libraries.

NLM SERVES LIBRARIANS AND THEIR CLIENTS ONLINE

Billings believed it was important to provide printed catalogs and indexes of biomedical literature to serve physicians and librarians (Miles, 1982, p. 112). The library printed *Index Medicus* and others for over a century. NLM realized early in the evolution of computers that these new machines had great potential to make publishing these extensive volumes efficient and then to enable distribution of the information to searchers, whether at the library, in another state, or in another country. In 1971 NLM made an electronic index, MEDLINE (for MEDLARS Online) accessible, eventu-

ally through nationwide telecommunications networks. Because MEDLINE required leased telecommunications lines and extensive training of three weeks, at first this online system served health professionals and researchers through librarian intermediaries (Kassebaum & Leiter, 1978, p. 166). In these early online days, clinicians, researchers, and students continued to use printed *Index Medicus* volumes in their local medical library. They turned to their librarian for more extensive or complicated searches where the online MEDLINE provided superior results.

To complement MEDLINE's strength in identifying biomedical literature, NLM, with the Regional Medical Library Network, launched the DOCLINE system in 1985. DOCLINE provided automated interlibrary loan (ILL) requesting and routing for librarians, a quantum leap in the efficiency and effectiveness of ILL in health sciences libraries. For twenty years NLM has provided the DOCLINE system at no cost, but libraries bill each other for supplying the articles. In 2004, 3,260 libraries worldwide made 2.7 million requests through DOCLINE (National Library of Medicine, 2005c, p. 16). About 13 percent of these requests, 360,000, were handled by NLM. Once again, this system serves health practitioners and other professionals through their institutional librarians. It was not until the personal computer became available that NLM was able to allow these health professionals and researchers to request articles from their libraries more directly.

FROM LIBRARIANS AND INFORMATION PROFESSIONALS TO HEALTH PRACTITIONERS AND CONSUMERS

After he began his tenure in 1984, one of the first projects NLM director Dr. Donald A. B. Lindberg inspired was for NLM to provide software for the personal computer that enabled individuals who had no training to search MEDLINE. "Grateful Med" debuted in 1986. Using Grateful Med, anyone with an NLM user ID, personal computer, and telephone modem connection could, for 2–3 dollars per search, retrieve references to the latest biomedical literature. Grateful Med cost just \$30, and NLM sent annual updates, which included the latest Medical Subject Headings (MeSH) vocabulary, for free. Physicians were among the early adopters of this technology, and NLM distributed over 96,000 copies of the Grateful Med software to physicians, researchers, and librarians all over the United States and Canada. Librarians, who had served as intermediaries for MEDLINE for many years, had concerns about NLM marketing Grateful Med to physicians; these concerns ranged from a loss of status and intellectual work for the librarian to the lack of physician expertise to perform well-formed searches (Humphreys, 2002, p. 12). Despite the concerns of some, many librarians promoted end-user searching, which is now the overwhelming norm.

Now armed with a citation, which included only an abstract of the article from a Grateful Med search, what users really sought was easy access to the

full text. In 1992 Grateful Med incorporated a software component called Loansome Doc. Loansome Doc software made the link between Grateful Med and DOCLINE and enabled health professionals to request articles directly from their local library (Glitz & Lovas, 1996, pp. 206–207). From that library, staff filled the request from their own collection or through interlibrary loan and delivered it to the health professional. With Grateful Med, NLM directly delivered biomedical literature references to health professionals. With its companion, Loansome Doc, NLM brought the two user groups together, linking librarians electronically to health professionals. There are currently 75,000 individuals registered to order articles using Loansome Doc. In 2004 they requested over 800,000 articles from libraries who serve them (National Library of Medicine 2005c, p. 16).

IMPACT OF THE INTERNET

Few would argue that “the Internet represents the most important technological development of our generation,” as stated by the University of Southern California Annenberg School Center for the Digital Future (2004). One of the ten trends noted in its comprehensive 2004 *Digital Future Report* is that the Internet has become the number one source of information for Internet users and that eventually almost every American will be an experienced user (Lebo, 2004, p. 9). The United States, with a total population of 296 million, has an estimated Internet user population of 201 million, or 68 percent. This has grown 105 percent since 2000 (Internet World Stats, 2005). Recent estimates of the number of Americans who search the Internet for health-related information are fairly consistent at 75–80 percent of adult users, or close to 100 million users (Manhattan Research, 2004; Fox, 2005, p. 1).

In 2005 nearly 100 percent of U.S. practicing physicians reported having accessed the Internet in the past twelve months, and 99 percent of online physicians reported that they use the Internet for professional purposes. In fact, professional use accounted for 55 percent of the overall use (Manhattan Research, 2005). Though the increase in the number of Internet users has slowed in recent years, the rapid growth of broadband use both in the workplace and at home has meant that people spend much more time online (Pew Research Center, 2005, p. 67).

FROM LOW COST TO NO COST

This rapid adoption of the Internet by all sectors in the United States has enabled NLM to serve librarians and health professionals, and virtually anyone who chooses to “log on,” as never before. In 1993 NLM was one of the first U.S. agencies with a presence on the World Wide Web. The first NLM Web site offered programmatic information about the library and its services, but it did not provide health information. During the first few years, the site grew from providing information about services to a portal

to the services themselves. The most important service was MEDLINE in its expanded form, PubMed, searched through the National Center for Biotechnology's (NCBI) Entrez search system, first released on the Internet in 1997 (National Library of Medicine, 1997).

With the release of MEDLINE/PubMed, NLM provided MEDLINE for free for the first time, and, like Grateful Med, it required no special training. Anyone with Internet access, from researchers to clinicians to librarians, could now search MEDLINE/PubMed. Novice users searched the literature using simple keywords. Experienced librarians, with previous training in MEDLINE searching and MeSH, learned Entrez's advanced features for more precise or comprehensive results, depending on the needs of their clinician clients. The impact of free Medline through the Internet has been astounding. Use of the system has grown from 7 million user searches in the year 1997 to 2.7 million searches each day in 2004 (National Library of Medicine, 2005c, p. 51).

A 1997 NLM survey of MEDLINE/PubMed users showed that a surprising number, over 30 percent, identified themselves not as scientists or health professionals or librarians but rather as members of the general public. MEDLINE has always indexed the professional literature of health and medicine, but it was not until it became free on the Internet that the layperson, whether patient, family member, or friend, had easy access to this rich resource. The survey made it clear that free PubMed on the Internet attracted all kinds of users. At the same time, an analysis of the search logs of NLM's main Web site showed that over 90 percent of the search terms entered were for medical information, even though the site contained programmatic library information and almost nothing for consumers (Miller, 1997). Clearly, people who searched the main NLM Web site expected health information, and many consumers attempted to use PubMed to find answers to their health questions. NLM responded to this need by releasing MedlinePlus.gov, a consumer health portal to the Internet in October 1998 (National Library of Medicine, 1998).

NLM REACHES PATIENTS AND THE GENERAL PUBLIC

MedlinePlus began modestly to serve consumers, with just over twenty key health topics. As the site grew, feedback from NLM's outreach project with libraries and other sources made it clear that not all consumers needed or wanted the same level of information. Usability and customer feedback indicated that some consumers want just basic background information on the causes, symptoms, and treatments for a disease or condition. Some consumers are looking for information on wellness and fitness. In contrast, patients and families dealing with a very acute or long-term medical problem may want the latest research and clinical information from the biomedical literature found in MEDLINE or current research studies from ClinicalTrials.gov.

The core of MedlinePlus is links to information from the National Institutes of Health (NIH) and other government and authoritative organizations, but even this large number of documents does not cover the breadth of information consumers want. To meet user needs for broader coverage, MedlinePlus licensed a medical encyclopedia. The encyclopedia provides information on symptoms, such as swollen glands, rashes, or chest pain, and tests such as hematocrit, sigmoidoscopy, or lipid profile. It describes these topics briefly and with colorful, clear, illustrations. In another example of meeting consumer needs, a MedlinePlus search log analysis showed that the second most frequent type of term users entered, after diseases and conditions, were generic and brand names for drugs (McCray, Loane, Browne, & Bangalore, 1999). In response NLM licensed consumer-level drug information to inform patients about this important health care component. Health news and weekly alerts for current awareness followed. To address the need for simple, low-literacy materials, MedlinePlus provides talking tutorials on many basic health topics and procedures (National Library of Medicine, 2005b). Each of these licensed information sources responds to a particular consumer need.

MEDLINEPLUS ALSO SERVES HEALTHCARE PROFESSIONALS

While continuing to develop and improve MedlinePlus for consumers, NLM had evidence that health professionals were using the site as well. A 2001 survey showed that 11 percent of the repeat users were healthcare providers, as were 11 percent of the first-time users (National Library of Medicine, 2001). The follow-up 2003 survey showed that 11 percent of the respondents were healthcare providers (National Library of Medicine, 2004). With over 60 million visits per month, MedlinePlus is clearly serving many professional care providers as well as the consumer audience.

NLM's March 2005 Web-based survey results show how the audiences of MedlinePlus and MEDLINE/PubMed differ by role, reason for visiting the site, and results of their visit.

Table 1 shows the roles of visitors to the two sites. For PubMed, more users self-report being Researcher/Scientists (46 percent), than any other role, while only 3 percent of MedlinePlus users come from this category. The largest proportion of MedlinePlus respondents describe themselves as Patient/Health Consumers, while respondents in this role make up only 3 percent of PubMed users. Those using the sites in the role of Physician make up 20 percent of PubMed users and 16 percent of MedlinePlus users. As the survey responses illustrate, these sites serve users in many professional and personal roles, from scientists to consumers to physicians, but clearly the nature of the content appropriately affects the proportions of each role. Thus, both sites have physician visitors in similar proportions, while MedlinePlus draws a much larger proportion of consumers.

Table 1. Responses to NLM 2005 Survey: "In what role are you visiting this site today?"

Identified Role	PubMed (%)	MedlinePlus (%)
Physician	20	16
Researcher or Scientist	46	3
Patient/Health Consumer	3	42
College or Graduate Student	22	9
Secondary Student	n/a	3
Educator	2	7
Librarian	2	4
Other	4	10
News/Media	n/a	2
Healthcare Administrator	n/a	4

Note: n/a indicates that the category was not an option on the PubMed survey.

As in the reported roles, the responses that PubMed and MedlinePlus users give for the "result of their visit" reveal similarities and differences in the audiences. Table 2 shows the "result" responses for each resource; users were allowed to select as many results as they wished. PubMed users most frequently responded that their PubMed use resulted in "keeping up to date about research" and "obtaining full text of articles." Next most often, PubMed users "learned about methods relevant to research," "improved understanding of a disease, diagnosis, or treatment," and "conducted further research." In comparison, MedlinePlus users most often reported "improved understanding of a disease, diagnosis, or treatment," which is the fourth most often result reported by PubMed respondents. MedlinePlus users also reported the results of "delivering search results to a requester," "conducting further research," and "discussing a disease . . . with a family member or friend." MedlinePlus users reported the result "made decision about patient care" much more often than PubMed users. Thus, these two resources share some user results, but they serve two audiences with different focuses and results.

Table 3 shows the reasons PubMed and MedlinePlus users visit each of the sites. Once again, respondents selected as many reasons as appropriate. Because the responses offered from each survey differ, these categories show no overlap, but they do provide insight into why users visit each site. The common reasons users visit PubMed are to "Perform basic biological research," "Find articles by specific authors," "Perform clinical research," "Education," and "Find articles in a specific journal." In contrast to the basic research and biomedical article purposes reported by PubMed users, MedlinePlus users most often report that they wish to "Find information on a specific disease, condition, diagnosis, or treatment," "Find information on medicines or prescription drugs," "Find general health and wellness information," "Keep up with breaking health news," and "A project

Table 2. Responses to 2005 NLM Survey: "What best describes the result of your visit?"

Answer	PubMed (%)	MedlinePlus (%)
Conducted further research on disease, diagnosis, or treatment	23	27
Discussed search results with my healthcare professional	4	12
Delivered search results to the requester	6	29
Improved understanding of a disease, diagnosis, or treatment	26	57
Made decision about patient care	9	16
Other	4	6
Sought further information from library	14	7
Kept up to date about research in field of interest	55	n/a
Obtained full text of selected articles of interest	50	n/a
Learned about methods relevant to research	27	n/a
Obtained help in reporting research results	17	n/a
Determined viability of research area	13	n/a
Completed administrative responsibilities	3	n/a
Did not find what I wanted	4	n/a
Altered exercise or eating habits	n/a	7
Discussed a disease, condition, diagnosis, or treatment with family member or friend	n/a	23
Made a doctor's appointment for self or another	n/a	7
Nothing specific happened	n/a	6
Switched from one medicine or prescription drug to another	n/a	4
Used information for a project or presentation	n/a	21

Note: n/a indicates that the category was not an option.

or presentation." The predominantly consumer MedlinePlus users seek health information, while the researchers and scientists using PubMed seek scientific and research information and find and/or verify articles.

These survey results illustrate that, after years of growth and improvements based on customer feedback, PubMed and MedlinePlus serve a variety of audiences, providing a continuum of health and biomedical information. For example, PubMed is just one of the many services NCBI offers to the scientific, clinical, and research communities. NCBI creates public databases and offers important databanks and software tools for scientists and researchers throughout the world (Wheeler et al., 2005). MedlinePlus and PubMed are interlinked so that consumers and health professionals can move easily between the two major resources.

MedlinePlus health topic pages from abdominal pain to x-rays have at least one, and often several, stored PubMed searches. National Library of Medicine reference librarians maintain these nearly 1,000 searches so that they retrieve fewer than 100 current review and clinical articles on a given topic. As soon as PubMed adds an article that meets the MedlinePlus stored search criteria, the stored search will retrieve it. For PubMed users, NCBI

Table 3. Results of 2005 NLM Survey: "What is your primary reason for visiting the PubMed/Medline Plus site today?"

Reason	PubMed (%)
Perform basic biological research	49
Find articles by specific authors	37
Perform clinical research	37
Education	26
Find articles in a specific journal	26
Check journal reference	22
Patient care	13
Other	6
Own health care or that of family or friend	5

Reason	MedLine Plus (%)
Find info on a specific disease, condition, diagnosis, or treatment	63
Find info on medicines or prescription drugs	39
Find general health and wellness info	33
Keep up with breaking health news	21
For a project or presentation	21
Find info on alternative treatments, herbals, or vitamins	16
Search for health care products or services	11
Other	9
Find info on clinical trials	8
Obtain the opinion of a healthcare provider	7
Search for healthcare provider	4
Find health self-help groups	3

provides LinkOuts to appropriate MedlinePlus topic pages. These contextual links allow users to navigate between the sites within their health topic of interest, without starting at the beginning of their subject search as they move from one resource to the other. This context-based navigation is very important in serving the different users from these electronic resources. These subject-based links allow PubMed health professional users to easily link to consumer-level information for their own background material or for a patient or family member. From the consumer resource, MedlinePlus enables consumers, students, clinicians, and anyone else to quickly retrieve the most recent biomedical journal citations on the topic.

NLM uses this same approach to guide users of MedlinePlus and PubMed to ClinicalTrials.gov, a registry of over 13,000 clinical studies sponsored by NIH, other government agencies, and private industry, and to the Genetics Home Reference (<http://ghr.nlm.nih.gov>), NLM's consumer health guide to understanding genetic conditions and the genes and chromosomes responsible for them (See Figure 1). By creating topical links on each of the tools and others, NLM facilitates users of all categories moving to and from basic health information, clinical trials, or in-depth research reports on a topic as their information needs evolve. NLM creates these interconnec-

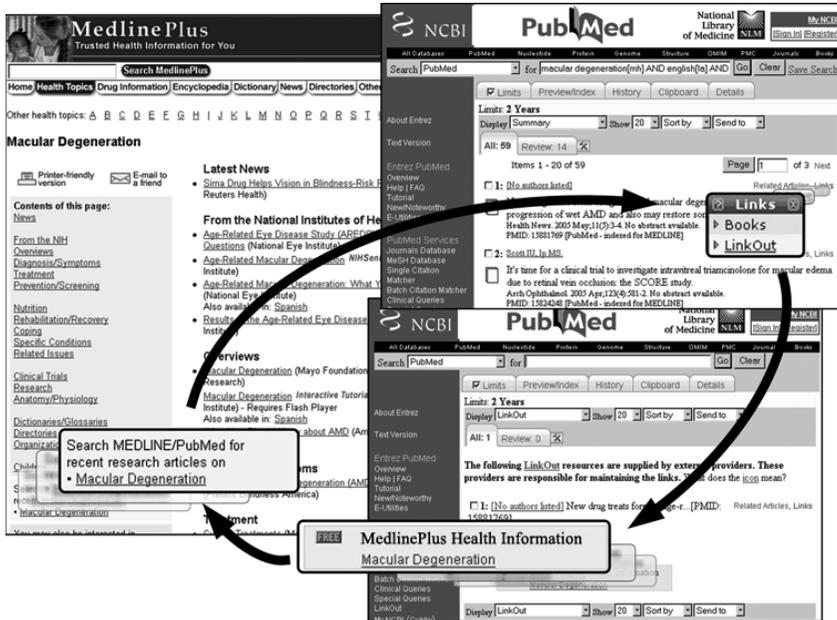


Figure 1. Topical links connect PubMed's biomedical research articles with the consumer health information in MedlinePlus so clinicians, consumers, and all users can easily navigate to other information. Other NLM services, such as ClinicalTrials.gov and Genetics Home Reference, provide comparable links.

tions based on vocabulary mappings from the Medical Subject Headings, the Unified Medical Language System (UMLS), and related vocabulary tools and keeps the links current so clinicians, consumers, and others always have access to the most recent information.

While NLM continues to improve its extensive services for clinicians and the public, it is also expanding services to other audiences. For example, NLM released a Spanish version of MedlinePlus in September 2002 to provide Spanish-language consumer health information for patients and their intermediaries, whether professional or family (National Library of Medicine, 2002). This site now delivers over 9 million pages of authoritative health information each month. More recently, NLM released WISER, a Wireless Information System for Emergency Responders (National Library of Medicine, 2005a). WISER provides critical information on 400 hazardous substances, including substance identification, physical characteristics, human health information, and containment and suppression guidance to first responders and other emergency personnel. NLM extensively tested each of these services with the target audience and made improvements to the service before public release; NLM continues to improve them based

Table 4. Selected NLM Resources and Target Audience

Resource	Health Practitioners	Consumers
Clinical Trials.gov—Patient studies for drugs and treatment	X	X
GENBANK®—Genetic Sequence Databank	X	
Genetics Home Reference—Genetic conditions and the genes responsible	X	X
Health Services Technology Assessment Texts (HSTAT)—Full-text documents providing health information and support for healthcare decision making	X	X
Household Products Database—Health and safety information		X
MedlinePlus®—Health information for patients, families, and healthcare providers (also in Spanish)	X	X
NIHSeniorHealth—Easily-accessible age-related health information		X
Profiles in Science™—Archival collections of leaders in biomedical research and public health	X	X
PubMed Central™—Digital archive of life sciences journal literature	X	X
PubMed®/MEDLINE®—References including abstracts from thousands of biomedical journals	X	X
TOXNET®—Network of databases on toxicology, hazardous chemicals, and environmental health	X	X
ToxTown—Interactive guide to toxic chemicals and environmental health risks (also in Spanish)		X
Unified Medical Language System® (UMLS®)—Electronic “Knowledge Sources” and associated lexical programs including SNOMED CT®	X	
Visible Human Project®—Three-dimensional representations of the human body	X	X
WISER—Designed to assist first responders in hazardous material incidents	X	

Note: For the Web site addresses of each resource, see <http://www.nlm.nih.gov/databases/>.

on user suggestions and experience. These are just two examples of how NLM continues to reach out to a variety of audiences, using their feedback to create the most useful product possible. Table 4 presents a selected list of NLM databases and resources and their target audience.

To serve new users and also more traditional audiences, NLM uses its strengths in organizing and disseminating authoritative biomedical and health information and in responding to user needs. Achieving this service goal requires dedication to maintaining vocabularies and system-relationships that ensure sensible links for users to navigate among the information resources. Long before computers and the Internet, NLM made these links between biomedical information, physicians, and librarians and continues to maintain those key connections while expanding services to directly serve clinicians and consumers. NLM will continue to serve both clinicians and consumers and others as it moves further into the twenty-first century.

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Joint Use Libraries: Implementing a Pilot Community/School Library Project in a Remote Rural Area in South Africa

SOPHIA LE ROUX AND FRANCOIS HENDRIKZ

ABSTRACT

The research of a postgraduate study into joint use libraries internationally led to the development of a proposed model for a community-school library relevant for South African conditions. This model was proposed to the Provincial Library and Information Service of Mpumalanga. Based on the requirements to successfully implement the model, the rural community of Maphotla was selected as a pilot site. The proposal coincided with the building of a new library. The framework of the research was used as a guide to draft a project plan that was used during implementation. During implementation of the plan, minor changes were required for practical reasons. Although the implementation of the model is in its beginning stages, it already has proved to be successful in relation to factors such as school participation, learners participation in library activities during and after school, and the participation of various other role players. It is envisaged to implement the model in other areas where there is a dearth of public and school libraries to improve access to libraries and information.

INTRODUCTION

There are substantial backlogs in the development of public and school library services in South Africa, especially in the remote rural areas. One way of achieving improved provision of public and school library services appears to be through joint use services. This article describes a study that investigated the variants of the school-community library model worldwide with the aim of defining a South African prototype, which would satisfy the

needs of a rural, tribal community (Le Roux, 2001). The article further describes how the prototype proposed in this study is currently being piloted in a remote rural area in Mpumalanga by forging partnerships with various stakeholders.

In the context of this article, a community-school library refers to an integrated public and school library service, operating from a single building according to an agreement between the school and another tax-supported agency or agencies, for example, the provincial or local government authority. It aims to serve learners, educators, and the community (general public) within the particular municipal boundary by means of the facility (Le Roux, 2001, p. 19). Remote rural communities are tribal communities living in dense, planned settlements with populations of over 5,000 people, and they are common in the former homeland areas. These settlements are referred to as "betterment" settlements in local government planning in South Africa (South Africa Ministry for Provincial Affairs and Constitutional Development, 1998, p. 13).

SCOPE OF THE SOUTH AFRICAN STUDY

Although several variants of the school-community library model that could be considered for South Africa do exist in other countries, a need was felt to develop models geared to the information needs of the diverse communities in South Africa. As the people living in the remote rural areas in South Africa are particularly disadvantaged as far as access to information to improve their lives is concerned (Le Roux, 2001, p. 254), the study investigated a possible variant of the school-community model that would suit the communities living in these areas. The study examined the variants of the school-community library in their particular geographical, social, and educational contexts in the United States, Canada, the United Kingdom, Scandinavia, and Australia (South Australia) to determine whether comparable conditions existed that would justify the implementation of this model in the rural, tribal areas of South Africa. The study examined the reasons for the historical development of the school-community library model in the selected countries, as well as the practical application of this model through a critical review of the literature, an analysis of published case studies, and a study of official documentation.

Prerequisites for the successful implementation and operation of the school-community library, as identified in the study of the selected countries, provided a framework for evaluating the possible application of the school-community library model to the rural, tribal communities in South Africa. The suitability of the different variants of the school-community library model for these communities was then considered. After examining all these factors, the school-community library model, housed in a public library building, was proposed in the study. The characteristics and the perceived advantages of this variant of the model were indicated as well as

the conditions needed for the successful implementation of this variant of the model. Finally, a set of guidelines was presented for the establishment and operation of this library model in a South African rural community in the tribal areas (Le Roux, 2001, pp. 275–291, 343–366); the guidelines could be used for piloting this model by provincial and local authorities in South Africa and also by government authorities in other African countries with comparable conditions.

RELEVANCE OF OVERSEAS EXPERIENCE TO SOUTH AFRICAN RURAL AREAS

The factors found to be crucial to the successful establishment of the combined school-community library in the selected countries were determined and examined in the South African context. These factors are set out below.

Political Commitment by the Government to the Idea of School and Public Library Cooperation

After a review of the relevant legislation governing school and public libraries, it became clear that nothing in South African legislation prohibits government bodies from initiating plans and actions involving cooperation between school libraries or between school and community libraries. Chapter 3 of the new South African Constitution requires all spheres of government, as well as government departments, to conduct their activities in a cooperative way (Constitution of the Republic of South Africa, 1996). It appeared that South African legislation actually provides an enabling framework for cooperative ventures between various partners (Le Roux, 2001, p. 216).

Commitment of Funding Authorities

A commitment by all the cooperating partners to funding the combined school-community library has proved to be crucial. This would present a problem in the South African context, as the funding of school libraries and community libraries, under the new constitutional dispensation, presents serious problems for provincial as well as for local authorities. The restructuring of local government particularly poses serious financial implications for community libraries in the light of new funding priorities for municipalities. In addition, the establishment of new library models, although cost-effective in the long term, would initially create additional expense (Le Roux, 2001, p. 228).

Provision of Adequate, Suitable, and Compatible Staff

In South Africa, the provision of adequate, suitable, and compatible staff would also create problems. In most schools during the past ten years, teacher-librarians have been retrenched or reassigned to other duties. The government's commitment to reduce personnel spending would impact

negatively on the staffing of the combined library model, on the range of services offered, and on the opening hours of the facility. Furthermore, the *South African School Library Survey 1999* (South Africa Department of Education and Human Sciences Research Council, 2000, p. 26–27) did find that, with the exception of Gauteng, in all the provinces fewer than 20 percent of personnel responsible for the school library were in possession of the appropriate qualification (Le Roux, 2001, p. 231). The appointment of sufficient and appropriately qualified staff in public libraries is also a continuous challenge.

Request from Local Community and Ongoing Community Support

Several factors work against the potential use of public libraries in rural areas. The adult population in the rural, tribal areas is mainly illiterate or semiliterate, and there is an absence of a reading culture (Raseroka, 1997, p. 2), as well as the dominance of an oral tradition (Fairer-Wessels & Mchet, 1993, p. 101). Therefore, it is important that, wherever a combined library service is considered, the community must have indicated that there is a need for such a service and that it will indeed be used (Bristow, 1992, p. 79).

Central Support Mechanisms

Central support—such as a cataloging, classification, and processing services; mechanisms for collection development and interlibrary loans; a professional development component; and an advice service—was found to be of the utmost importance (Little, 1996, p. 36). Following the complete restructuring of Library and Information Services (LIS) in South Africa in 1994, the majority of the new provincial LIS as well as the provincial Education Library and Information Services (ELIS) still do not have the necessary resources and staff to provide central support to community libraries and school libraries (Le Roux, 2001, p. 232).

Involvement of All Parties in Planning for a Library Model

All the groups likely to be affected by, or involved in, the implementation of the library have to be represented on the planning body. In the South African context, the leadership in the particular community has to be identified and care has to be taken that all community structures are represented on the planning body so that the library will grow out of the needs of the community and not be imposed from outside (Fairer-Wessels & Mchet, 1993, p. 107).

Careful Planning of the Combined Library

The representatives of the community should elect a planning committee during the initial planning stages. Areas that need to be given special consideration by the planning committee are the physical facility, including its location, size, and design; the staff; the decision-making authority; financing; collection development; administration; and marketing the proposed combined services (Le Roux, 2001, p. 235).

A Service Based on the Needs of the Community

When planning a combined library for a South African rural, tribal community, it is necessary to take note of development theories and development research. A "basic needs" approach is called for, which would make the combined library relevant to the life and work of the people in the community and would contribute to improving the quality of their life (Stander, 1993, p. 6). Only then would the community accept it as their major source of information (Ngulube, 2000, p. 2).

Locally Representative, Enthusiastic, and Skilled Library Board of Management

The appointment of a locally representative, enthusiastic, and skilled Library Board of Management has been found to be of critical importance to the success of the combined library. This body should represent all parties involved in accordance with the specifications of the joint use agreement. In the rural, tribal communities, this would call for much initial and ongoing capacity building of the library's governing body members by the relevant provincial education department (PED) and provincial LIS.

Clear and Flexible Guidelines and Procedures

Clear guidelines for the establishment and operation of the combined library model were felt to be essential in clarifying the needs, roles, and responsibilities of all parties and in outlining the outcomes of the cooperative venture (Le Roux, 2001, p. 241).

PROPOSED PUBLIC LIBRARY-BASED COMMUNITY-SCHOOL LIBRARY MODEL

In terms of the crucial factors mentioned above, it was found that the successful implementation of the community-school library model, as found in the selected overseas countries, would not be accomplished easily in South Africa. This would especially be the case in the remote rural, disadvantaged areas of South Africa.

For example, it was apparent from the literature that combining community and school library services in the selected countries was only considered and implemented in cases where there was either a lack of school library services or of community library services, as well as an absence of qualified library personnel. This was mostly the case in small, remote rural communities. In almost all the cases, the combined school-community library was housed in the school. A precondition for this arrangement, however, was a functional and well-resourced school library, making it the obvious place to establish a joint use facility.

According to the findings of the *School Register of Needs Survey*, conducted during 1996 (South Africa Department of Education, 1997, p. 8, fig. 16), primary school libraries in the rural provinces of South Africa are almost nonexistent, with percentages as low as 2 percent. The percentage of secondary schools with school library facilities was also found to be very low

in these provinces. This shortage of on-site school library facilities has been confirmed in the *South African School Library Survey 1999* (South Africa Department of Education and Human Sciences Research Council, 2000, p. 11). In addition, the *School Register of Needs Survey* showed that there was a national shortage of 57,499 classrooms in 1996 (South Africa Department of Education, 1997, p. 9). Therefore, the building of classrooms, rather than libraries, is a priority for the government. Moreover, specialized facilities, such as a library for a secondary school, comprise almost 50 percent of the building cost of the school, while general teaching space usually represents less than 30 percent of the total cost. Maximum shared use should be made, therefore, of these expensive, specialized facilities and space by schools and the communities (Smit & Hennessy, 1995, 45–46).

The use of existing school libraries for a combined school-community library, therefore, appeared not to be a viable proposition for the remote rural areas. The study instead proposes a variant of the school-community library model, one where the combined library is located in a public library facility and is surrounded by a cluster of schools, hence the term “community-school library model.” This is a group of schools in close proximity, grouped so that they may share some of the capital-intensive facilities. It is obvious that the proposed model of the community-school library, where different schools and the community use the library facilities, could only be implemented in rural areas where there are already clusters of schools. The *Schools Register of Needs Survey* has indicated, however, that clusters of schools in South Africa are located in either the metropolitan areas or in the former homelands and self-governing states (South Africa Department of Education, 1997, p. 9). Where clusters of schools are found in remote rural areas in South Africa, the establishment of a combined community-school library in an accessible, public library building, if available, would appear to be a more cost-effective and practical solution for serving the community and the cluster of schools in these areas.

CHARACTERISTICS OF PROPOSED LIBRARY MODEL

Community Traits and Involvement

The target community for the public library-based school-community library is a community living in a rural area, which, in all likelihood, falls under the authority of a traditional leader. This community comprises a relatively small and homogeneous group of people sharing the same culture and language, who live and work together in close, interdependent proximity, and who share close personal relationships, common value systems, and a strong awareness of their distinct group identity.

The adult section of such a community is characterized by a high level of illiteracy, a dominant oral tradition, limited resources, and a need for information for mere survival. The community shows signs of direct involvement

in school matters and social and cultural activities. Bristow refers to this type of community involvement and commitment as “a sense of communality” (1992, p. 79), considering it the greatest resource of rural disadvantaged areas. The acceptance of the idea of a combined library in the community implies a commitment by the community to maintain the operating services of the facility by means of funds and voluntary personnel.

Location, Size, and Design of Facility

The location of the combined facility has to be within a 750-meter radius of participating schools, that is, the schools have to be within ten minutes' walking distance from the library. The facility can be either a new purpose-built library or an existing structure found to be suitable by the provincial LIS for housing a combined library facility (Hendrikz, 2000, p. 8). The nature of the accommodation and of the facilities will be determined by the aims, goals, and objectives of the information service. It is imperative for the facility to have one or two separate activity rooms with external doors for teaching information literacy to the learners of the participating schools during the day, and for adult community activities during the evenings.

Staffing

The library has to be staffed by a qualified public librarian with at least paraprofessional qualifications. The librarian has to be active in interpreting the information needs of the users, who may not be functionally literate, and in providing relevant material. The librarian has to have credibility and standing within the community and has to be a fully committed member of the community.

In addition, the part-time services of teacher-librarians or teachers from the participating schools need to be time-tabled to teach information literacy to each of the schools' classes and to create and sustain a positive reading climate in the schools. They also need, in cooperation with the librarian, to plan for the purchase of curriculum-oriented information resources. Voluntary library workers need to assist with the performing of routine library tasks and the delivery of the various services and outreach programs to the community. The voluntary library workers should assist the librarian with marketing the library and its services to the community and thus will play a proactive role in ensuring its use by the community. Retrenched or retired teachers could be used for conducting literacy and Adult Basic Education and Training (ABET) classes (Le Roux, 2001, pp. 261–262).

Library Stock

The information resources should include all available media to meet the needs of non- and newly literate users and cover topics of relevance to the community. This information has to be in a simple and accessible written style, and it has to be available in the indigenous language of the

community. Special attention has to be given to the reading needs of the school learners in the community in order to create the habit of using libraries for information, education, and recreation.

Services and Outreach Programs

The community itself should determine the level of services of the combined library. It needs to be a people-oriented information service, combining the oral tradition and the print medium, so that everybody in the community can be reached. An interactive community information service should be provided according to the needs of the community, forming an integral part of the community development process.

One of the pivotal services offered by the combined library should take the form of block loans, circulated regularly to the classrooms of the participating schools, as a resource for both educators and learners. The presence of books in the classroom would ensure that books and book-related learning are integrated into the learners' classroom experience from an early age, promoting an awareness and appreciation of the importance of books and libraries.

The combined library should form part of the existing provincial LIS with all its advantages. The combined library would also forge links with other community-based and nongovernmental organizations to enhance its services to its users. These would include literacy organizations, educational organizations, and initiatives such as telecenters and multipurpose community centers (MPCCs) (Le Roux, 2001, pp. 263–266).

CONDITIONS NEEDED FOR THE SUCCESSFUL IMPLEMENTATION OF THE MODEL

Government Funding and Support

The public library-based community-school library model presupposes the involvement and financial commitment of the local community. However, the financial backing and other support of the provincial and local governments are crucially important to the success of the model.

Location and Size of Facility

The facility should be located within a minimum walking distance of the school: about one kilometer from primary schools and two kilometers from secondary schools. A cluster can consist of five to twelve schools (Smit & Hennessy, 1995, p. 2). The size of the facility may vary significantly from community to community, according to different community dynamics and circumstances.

Pre-Service and In-Service Training

Librarians working in rural, tribal communities should be trained to fulfill "shifting" roles when serving both schools and information-deprived communities (Töttemeyer, as quoted in Radebe, 1997, p. 69). Workshops

for principals and educators on the role of the school library, its value in the new outcomes-based education (OBE) curriculum, and its central position in learning are essential. The failure of principals to recognize the importance of these factors has been identified as being a major hindrance to the promotion of school libraries (Radebe, 1997, p. 225). The PEDs need to provide educator development programs on the utilization of educational technology and the Internet as a tool to enhance teaching and learning (Le Roux, 2001, pp. 269–271).

Access to and Utilization of Information Communication Technology

The various information communication technology (ICT) initiatives in South Africa have great potential to enhance the public library-based school-community library model in the rural, tribal areas and would add a new dimension to this library model. By utilizing the ICT infrastructure available in South Africa, the combined library has the potential to enable members of remote rural communities “to exploit information to enhance their well-being” (Economic Commission for Africa, 1999, p. 19).

BACKGROUND OF MPUMALANGA

The Mpumalanga Provincial Library and Information Service initiated the building of a new library during 2003 in Maphotla, a rural, tribal area in Mpumalanga. The location of this community library and the characteristics of the Maphotla community appeared to be most suitable for developing this variant of the combined school-community library. Therefore, it was decided to pilot this particular school-community library model in this community in partnership with other stakeholders.

Mpumalanga is one of the nine provinces of South Africa. Prior to the first democratic elections of 1994, South Africa consisted of four provinces. Following the election, five new provinces were established, of which Mpumalanga was one. It is mainly a rural province. Mpumalanga inherited a public library infrastructure that was fairly well developed in and around the main towns of the province, but the same cannot be said of the rural areas. Two former homelands were also incorporated into the province. Library services and infrastructure in these areas were either very limited or nonexistent.

Public libraries and school libraries in Mpumalanga are currently the responsibility of two separate government departments, the Department of Culture, Sport, and Recreation and the Department of Education. The lack of public library infrastructure and services in Mpumalanga is one of the biggest challenges facing library authorities. The same scenario is true for school libraries. The lack of various resources has made it difficult for library authorities to establish any appropriate library infrastructure and services. Most schools are without any school libraries and teacher-librarians have been laid off or reassigned. The public library authorities

have recently determined that there is a need for ninety-eight public libraries in the rural areas. It is almost certain that building new libraries alone will never address such a backlog. This assumption is based on the fact that it took almost four years to secure funding to build two new public libraries during the 2002–2003 financial year. The lack of appropriate funding is the single most important factor influencing the establishment of proper library facilities and services. This is also true for school libraries where the focus is on the building of classrooms. Catering to the needs of learners is the priority of the education authorities. Therefore, it is clear that it is in the interest of both school and community library authorities to share resources in order to bring library services to the whole community.

The community-school library model provides an ideal opportunity for library authorities to explore the possibilities of such an endeavor. If the need for both public library services and school library services can be addressed through the innovative use of one facility, both parties could save valuable resources. These savings may in turn be utilized to improve the quality of the library services.

THE MAPHOTLA COMMUNITY

There are various reasons for the decision of the Provincial Library Service to select the Maphotla community area to build a new library building. Firstly, there has been much community enthusiasm for, and involvement in, establishing a library in the community. Secondly, there are well-established community-based organizations and committed and active community leaders all supporting the library.

The demographic profile of this community played a major role in deciding where to locate the library. The only official figures available for the Maphotla community during the planning stages of the building were those of the 1996 census. The total population of Maphotla is 8,558, of which 3,967 are male and 4,591 female. The Maphotla population is very young. Almost half, 49 percent, of the total population is made up of young people up to the age of nineteen. This already gives one indication of the vast potential for libraries in terms of reading and educational needs. In light of the youth of the population and the fact that 54 percent of the total population is female, it has been assumed that there are many mothers in the community. This therefore represents another huge potential market for the library in terms of childcare programs, mother and child reading programs, and book awareness programs. People who are unemployed and those with no income in the community make up a substantial 49 percent. This implies that these people may be hoping to use the library to improve their knowledge, skills, and qualifications in order to obtain a job or to become entrepreneurs contributing to the economy of Maphotla.

The most challenging figure considered during the planning stages was that 73 percent of people have little or no education. This figure indi-

cates that illiteracy is rife, implying an almost nonexistent reading culture. Although the community had started a library on its own initiative, it was safe to assume that there was a limited library culture. It was clear from the beginning that strategies were needed to familiarize the community with the library and to attract and explain the use, role, and function of the library to all community members. The use of library resources by the community and the schools was also carefully considered.

These figures are just a brief overview of the Maphotla community. These and other factors were taken into consideration during the planning phase of the school-community library service. It was also important to keep the dynamics of this community in mind when planning library services. To ensure the relevance of the library in terms of the information and education needs of community members, it was acknowledged that conditions are constantly changing, requiring frequent monitoring and community engagement.

PROJECT PLAN

The success of any project depends on the amount of planning that goes into it. This undertaking was no different, and a broad project plan was developed. The project plan is important to clarify what one wants to achieve and to focus one's efforts. The project plan was envisaged as a discussion document to attract the interest of various other role-players. One of the main role-players was the provincial Education Library and Information Services (ELIS), which immediately supported the plan.

The aim of the project was to establish a functional community-school library model as a benchmark to be replicated by other communities lacking sufficient and appropriate library facilities and services in South Africa. Five objectives were identified:

- Building a complete new library facility and furnishing it by April 2003
- Making the community aware of the library and involving community members where applicable
- Signing agreements with relevant authorities for the management and maintenance of the library facility and its contents
- Preparing the library to render a fully functional library service to the community at large
- Developing and rendering comprehensive school and community library services and facilities in support of personal and/or community development initiatives

The project plan listed various broad strategies to achieve each of these objectives, and it also proposed types of services the library could offer and a project schedule for implementation.

BRINGING THEORY AND PRACTICE TOGETHER

Following the findings of the research as described above, including the project plan, the Provincial Library Service of Mpumalanga took the responsibility to ensure the successful implementation of the project. After various delays, the new Maphotla library building of 500 square meters was officially opened during April 2004. The following sections indicate some of the practical lessons learned.

Community Awareness of Library Project

Making the community aware of the project to secure its support, acceptance, and involvement was very important in giving the library a relevant role in the community. The existence of a library in Maphotla was not new since the community started one on its own initiative a few years earlier. Therefore, the community was already aware of a library in its midst. What was different was the fact that a new library building, with new services based on the community-school library model, was being planned. Thus, the community had to be informed. This was done most effectively during a community information meeting held during January 2003. At this meeting, the project proposal was introduced to the community. The important role and function of the library as well as reading was re-emphasized by various speakers. Over 200 people from the Maphotla community attended the meeting, including various community leaders, the mayor and councillors of the local municipality, as well as the provincial member of the executive council responsible for the Department of Culture, Sport, and Recreation, that is, the highest political authority in the province. One of the success factors for such projects is the political support available. In this case, the project was fortunate in being well supported by the provincial and local political leaders from the beginning.

The general community meeting was followed during June 2003 with a specific meeting between the provincial LIS, six principals of the surroundings schools, and other officials from the Department of Education. During this meeting, the community-school model concept was explained in more detail, along with the various responsibilities of the stakeholders involved. The principals fully understood the goals and objectives of the new library and the role that their various schools would play. Other issues such as staffing, training, library collections, and classroom libraries were discussed as well. It was determined, for instance, that classroom libraries were not a viable option. One of the reasons for this was the fact that class groups were rotating and each class group did not have its own classroom. It was proposed to consider making available a school collection that could be housed in a book box, a metal box able to contain up to 600 books; it is fully lockable and also movable since the box is set on wheels. It was agreed at the meeting that each school would identify the necessary staff to act as coordinators between their school and the library.

With the necessary support and awareness established, the local librarian continued to establish a representative library committee. This committee mainly consisted of the nominated coordinators from the six surrounding schools, including the staff of the Maphotla library. They communicated with other relevant stakeholders when necessary or when they required guidance from the Provincial Library and Information Service (PLIS), the ELIS, and other bodies. The purpose of this committee was not to manage the library but to guide and assist both schools and the library in matters such as

- collection development (identifying information sources needed; balancing print, visual, and audio formats; language);
- administration (hours of opening, circulation procedures, policies);
- promoting and marketing the library and its services;
- utilization of facilities by community groups, school groups, and individuals;
- consultation with government authorities and any other groups on issues relating to the library;
- this resulted in a practical arrangement between the library and the schools on how they planned to make the community-school library concept work.

The Community-School Library Model in Practice

The committee agreed to bring school children to the library during official school hours. A date and time schedule was devised for this purpose. This schedule is displayed on the notice board of the library for all to see. At first it was decided to focus on the grade 4, 5, and 6 learners, aged 9 to 11. This was mainly done in order to iron out logistical and other practical arrangements. The committee determined that the library would be used for school purposes from 8:00 until 11:00 in the morning, after which it would be open to the public. The public was welcome to use the library during “school hours” with the understanding that certain activities would be taking place in the library that may be distracting.

Each school was allotted one and a half hours to use the library during “school hours.” This includes the walking time of the groups to the library. It was agreed that each class would be accompanied by its teacher for monitoring purposes. All teachers were oriented beforehand. At the beginning of the project it was decided to focus on general library orientation only. All of the above arrangements were cleared with the Department of Education, the local provincial authority, and the parents of the community.

After class visits, the teacher nominated five pupils from the class to go back to the library after school closure to do certain assignments. This was done to determine whether the children did learn how to use the library and where to find information. The librarian assisted them in this. In fact,

the librarian had to turn away children in the afternoon after their class visits due to overcrowding.

Service-Level Agreements

Service-level agreements are necessary to clarify the role and function of the relevant authorities for the management and maintenance of the library facility and its contents. There are various structures involved in making the project successful. Agreements have been signed between the municipality and the Provincial Library and Information Service of the Department of Sport, Recreation, Arts, and Culture (DSRAC PLIS). This agreement covers the basic administration of the library, including management, funding, staffing, training, marketing, and library resource ownership and accountability. An agreement is still to be drafted between the PLIS and ELIS, the two main service providers of the library. This agreement will cover aspects such as

- collection management (selection, acquisitions, processing of material, cataloging, ownership of resources);
- budget planning;
- accommodation of shared resources;
- minimum norms of shared services;
- information technology management;
- distribution of material to library and schools;
- human resources (sharing and skills transfer);
- training programs (user education, information accessing skills, literacy skills, reading programs);
- marketing planning and events.

A third type of agreement that may be considered as the project develops is between the municipality on behalf of Maphotla Public Library and any stakeholders interested in providing cooperative services through the library, that is, community-based organizations and nongovernmental organizations. Areas likely to be covered are type of service to be rendered, assignment of responsibility, budget, use of facilities (access, hours), and minimum requirements and nature of services.

It is important that these agreements be drafted and signed to administer and manage relationships and to ensure that each stakeholder understands its roles and responsibilities. This minimizes misunderstanding and ensures that services are provided as agreed.

The library is extensively pursuing partnerships and relationships with external organizations. One example of such cooperation that was in place long before the new library became a reality is with a nongovernmental organization (NGO) called *Biblioref*. This is an international NGO with an office in South Africa. The main purpose of *Biblioref* is the distribution of

new children's books, in the community language, to disadvantaged communities. Biblionef donated various nonfiction and reference books and has already indicated that it would be extending its services to include the provision of educational toys and a reference collection for educators, as well as support in reading programs. The librarian also successfully applied for a grant from the Nelson Mandela Children's Fund to purchase additional resources for the library. This type of support and linkages are vital for the continued success of the library, which is very isolated and far removed from well-established service providers. Other external support will be sought depending on the needs of the community and the library.

ADDING VALUE TO THE COMMUNITY-SCHOOL LIBRARY SERVICE

Starting a brand new library requires a great deal of preparation. Adding to the mix the establishment of a community-school library model, something that has never been done before, gave the planners even more responsibility. Some of the strategies implemented to prepare the library service are described below.

- It was necessary to select and provide library material to the library in accordance with the diverse needs of the community at large.
- Since this library is serving two distinctive markets—the public at large and the school community—special attention has been given to the selection of material for learners and educators in support of the education function. The experts in the Department of Education performed this task, as the material has to be in line with the National Curriculum.
- Teacher-librarians of the participating schools need to be trained to utilize the learning support material and in teaching information literacy. To strengthen this strategy, the PLIS arranged an Information Literacy Workshop for teachers at the library during March 2005 presented by Professor M. Nassimbeni and Dr. K. de Jager of the University of Cape Town. The aim of the workshop was to introduce teachers to the concept of information literacy in the classroom, showing how it can enhance their teaching and learning. It also addressed the issue of how the library in partnership with the schools can assist learners with school tasks and assignments in order to encourage resource-based and lifelong learning.
- Computer equipment had to be installed and training provided to the library staff. The Provincial Library Service was fortunate to secure a grant from the Carnegie Corporation of New York to computerize all public libraries in the province and provide access to the Internet and the electronic catalog of the province. This three-year project, called *Building Electronic Bridges*, also includes the training of library workers to utilize the equipment, including processing of interlibrary loans.

SERVICE MIX

Developing comprehensive school and community library services and facilities in support of personal and/or community development initiatives is what the library model is all about. Various “service mixes” are possible. Services in place for the typical public/community library part of the model cover the traditional services, such as

- lending of library material;
- interlibrary loans;
- study and reading facilities;
- photocopying, faxing, and use of audio-visual equipment;
- exhibitions; and
- reference service.

Services in place for the educational arm of the model cover

- visits by school classes to the public library;
- rotation of bulk loans from the library to the schools;
- visits by public library workers to class libraries in participating schools;
- coordination of planning of project work between the librarian and the educators of the schools; and
- the development of course materials and the presentation of the workshops for principals, school governing bodies, and educators of participating schools.

A third service mix is also planned and provided, which includes various other initiatives that will benefit the community through the use of the library and its facilities. These services are usually rendered by outside organizations and include

- ABET classes;
- literacy classes;
- information literacy classes;
- workshops and video presentations on relevant and applicable topics, for example, HIV/AIDS by the Department of Health;
- the provision of life-skill assistance, for example, writing letters, filling in forms, utilization of telecommunication facilities;
- other community-specific services, for example, local art or craft exhibitions and classes and career guidance; and
- book talks, storytelling sessions, and reading programs.

With regard to the latter, the library is involved with the Centre of the Book, which is part of the National Library of South Africa, in a project called “First Words in Print.” Book packs consisting of four books per pack have been distributed to 2,500 children between the ages of one and five

years. The books are written and illustrated by South Africans and are provided in the language spoken in the Maphotla community.

MONITORING AND EVALUATION

The project could be evaluated on two levels. One measurement is to compare how closely the implementation of the project followed the findings of the original research into joint use libraries. Another measure is evaluating specific activities and strategies used during the implementation of the project.

Evaluating the implementation success of the model against the initial research findings and guidelines found in the literature, the following conclusions can be made:

- The project received the political commitment on the highest level from the beginning.
- Due to the above commitment, the approval of the required funding for the project was a matter of routine.
- The availability of adequate and suitable staff is one area that needs serious attention. The library has been operating with volunteers since its opening. The main obstacle experienced in this regard is the lack of funding from the local authority responsible for appointing staff. One post has been advertised that will partially address the situation.
- The local community has been involved in the establishment of a library since the late 1990s. Therefore, they supported the establishment of the new library in their community and saw it as fruits of their labor.
- The Department of Culture, Sport, and Recreation is in a position to render a central library support service to the library in terms of book provisioning, marketing material, and general administrative support. Support from the Department of Education still needs attention in terms of educational material. This will be addressed through a formal service-level agreement.
- Many stakeholders have been involved from the beginning and are still involved in planning and making the community-school library concept a success.
- Based on the above involvement, the services rendered by the library are in line with the needs of the community. This aspect will receive continuous attention to ensure the relevancy of the library in the community.
- Research proposed the establishment of a library board to assist with the management of the library. In this environment this was found to be too formal and structured. A more informal library committee has been established and is achieving the same results.
- Clear guidelines and procedures for the establishment of the model assisted those responsible for implementing the model from the beginning of the project. Small adaptations were made where applicable.

- Training is seen as a continuous activity and has been addressed through informal and formal interventions.
- The library building has been developed with the community-school library model as the guiding principle. It is optimally located within walking distance from the six schools serving the Maphotla community. Where distance from the schools has posed a problem, it was addressed through allowing more walking time to reach the library.
- The availability and use of ICT is in its infancy for most of the libraries in Mpumalanga. Establishing online access for a rural library like Maphotla is still a major problem due to insufficient telephone and other networks. Cost is another challenge. The library has access to a computer and a number of CD-ROM encyclopedias.

Based on the above synopsis, it is clear that there is general alignment between the research findings and practical implementation, with minor adaptations where required.

The second method of evaluating specific activities and strategies used during the implementation of the project also resulted in positive feedback about the progress of the project. A formal evaluation meeting was held after implementing the first classroom orientation visits to the library. Some of the items discussed included a proposal to consider extending the duration of the classrooms visits. It was also mentioned that scholars became more aware of what the library has to offer; that they became motivated and self-disciplined readers; that books were not abused, etc. As a result of the program, a huge number of scholars came to the library in the afternoons. On occasion, some of the older scholars read to the younger ones in the library.

Although a schedule was compiled, it was noticed that certain educators and classes did not come to the library as arranged, which created problems. The need for better communication and arrangements between the library and affected schools was reaffirmed. Scholars and teachers suggested a focused approach with topic lessons for the older grades in the library; access to drama books; promotion of writing with a young authors competition; and promotion of reading in general.

It is clear from this first evaluation that the project had made an impact and that schools are enthusiastic. It will require continued support from the PLIS and the Department of Education to establish and sustain the model as part of the daily activities of the schools and the library.

CONCLUSION

All five objectives of the original project plan have been achieved. A new and modern library was handed over to the community; the community was made aware of, informed about, and involved in library plans and functions where appropriate; agreements have been signed, to ensure

sustainability of the library and the project, between principal stakeholders who were informed of the project and plans for the library through various communication initiatives; the library started to render its services to the public as planned; and the community-school library concept has been actively developed. It is accepted that some of the objectives still need more attention. Agreements with other stakeholders should still be pursued to ensure full commitment and participation of all. Time to implement such a model should not be underestimated. The remoteness, lack of basic communication infrastructure, and number of stakeholders adds to the delay in implementing the model as planned. Although the community-school library model is starting to work in the Maphotla library, it is a developing model that will be flexible and adaptable in its approach to ensure the successful establishment as a model library in every sense.

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Index to Volume 54

SUSAN KELSCH

Page references in **boldface** indicate major treatment of a topic. Italic *t, f, or n* indicates information in tables, figures, or notes.

- A
Aarhus, Denmark, State and University Library, 59–60
Academic libraries
 British Columbia College and Institute Library Services, 423
 Consortium of Research Libraries, UK, 368
 digital preservation, 2, 39
 dual-use libraries, 486, 502, 537–538, 542, 546, 552–565, 569–579, 581–594
 Electronic Document Exchange Network, 349
 Harvard University Library, 14*n*, 101
 Hellenic Academic Libraries Link, 362–364
 Information and Library Network, India, 478–479
 Massachusetts Institute of Technology Libraries, 7–14
 National Health Service Trust, UK, 600, 602
 North West Academic Libraries, England, 367
 OhioLINK project, 344, 394–395, 402–406, 403*f*, 404*f*, 405*f*, 405*t*
 Ontario Digital Library, 457
 state cooperation, 458
 United Kingdom consortia, 419
 University of California, San Diego, 13
Access issues
 age appropriate materials, 190
 Big Deal journal agreements, 402–403
 children and digital resources, 174–175, 188–191
 digital preservation system design, 148, 149
 dual-use libraries, 496, 503, 526–527, 532, 544–545, 576
 European consortia, 377
 health libraries, 601
 India, 464, 472, 480, 481, 483
 National Electronic Library Program, Finland, 360
 Open WorldCat project, 431, 435, 447
 print disabilities, 411–412, 415, 417–418, 425
 teenagers and the Internet, 211
Acquisition and ingestion, digital content
 digital preservation methodology, 59–60, 61–63, 74–75, 76, 79*f*, 81*f*, 99–103
 DSpace project, 11
 Global Digital Format Registry, 127–128
 Koninklijke Bibliotheek, 36, 42, 49

LIBRARY TRENDS, Vol. 54, No. 4, Spring 2006 (Indexes issues 1–4 of Volume 54.), pp. 640–669

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- Legal and Historical Internet
 Archive System (BBC), 27, 30–31
 Ontario School Curriculum
 Resource, 455
- ADA. *See* Americans with Disabilities
 Act of 1990
- Adaptive technology, print disabilities,
 415, 420
- Administration and management
 Azalea Public Branch Library, FL,
 583–584
 College Hill Library, CO, 570–572,
 578–579
 dual-use libraries, 488, 491, 492–
 494, 495–496, 503–506, 509–510,
 511–516, 530, 532–533
 Electronic Document Exchange
 Network, 351, 355
 Global Digital Format Registry, 139,
 140–141
 Hellenic Academic Libraries Link,
 364
 Indian National Digital Library in
 Science and Technology, 471
 Information Age Town project, 283
 Koninklijke Bibliotheek project, 50
 National Electronic Information
 Consortium, Russia, 366
 National Electronic Library
 Program, Finland, 361
 National Library of New Zealand,
 102*f*, 103, 104*f*, 105
 Ontario Digital Library, 456
 Ontario School Curriculum
 Resource, 451–452
 preservation environments, 147*f*,
 148, 150*f*, 151*f*, 152–153,
 154–155
 South African community-school
 library, 622–624, 624, 630, 632,
 633–634, 636–637
 Visby, Sweden, dual-use library, 557
 West St. Petersburg Community
 Library, FL, 589–594
 Worcester, UK, dual-use library,
 535–548
- Adolescents. *See* Teenagers
- Adult education
 Ireland, 281
 South Africa, 635
 Sweden, 561
 United Kingdom, 524
- Advertisements, 331–332
 Affective paradigm, 197–208, 297
 Agarwal, P., 467, 468
 Age, of public library users, 524–525
 Age appropriate materials, 190, 298–
 299, 311, 313, 324–326
- Almedalsbiblioteket, Sweden, 554–556,
 557, 564
- Alternate formats, print disabilities,
 415, 417–418, 420–421, 424,
 425–426
- American Memory project, 458
 Americans with Disabilities Act of
 1990, 415
 Amey, Larry, 506
 AMICUS Catalogue of the Library
 and Archives Canada, 420
- Animation, 327–328
 Annotated Card program, 311,
 314*n*
- Annual reports, 496, 509
 Anomalous state of knowledge (ASK),
 197–198
- ANSI (American National Standards
 Institute), 385
- Application Protocol Interfaces (API),
 153
- Architecture, 573
- Archival Information Packages (AIP),
 128, 153
- Archives
 Libraries and Archives Canada
 (LAC), 458–459
- Ardnamurchan school, Scotland,
 531–532
- Ariel software, 347, 386
- Arora, J., 467, 468
- Art and Architecture Digital Media
 (OhioLINK), 409
- ARTEMIS Digital Library, 311–312,
 338
- Ask A service, 231
 Ask Jeeves for Kids, 326, 331*f*
 AskNow reference service, 214
- Assessment and review
 British Broadcasting Co., 20
 dual-use libraries, 496, 501–518,
 545–546, 636–637
- Assistive technology, print disabilities,
 415, 420–421, 424, 425–426
- Astleitner, H., 297
- AT&T Solutions, 42

- Audio and sound content
 alternate formats, 425–426
 audio books, 419, 420, 422, 423
 children and digital resources, 293
 Information Age Town project,
 Ireland, 279
- Australia
 National Library of Australia, 2–3,
 63–68
 school community libraries, 506,
 516, 521
- Australian Government Metadata
 Project, 68
- Authentication, Shibboleth, 389
- Authoring tools, 73
- Automation
 dual-use libraries, 574–575
 interlibrary loan systems, 609
 preservation metadata, 3, 68, 95,
 97–105, 98*f*, 100*f*
 Web site preservation, 59, 60, 74–
 75, 76, 80
- Azalea Public Branch Library, FL,
 582–594
- B**
- Backup systems
 DSpace project, 12
 Koninklijke Bibliotheek, 42
 Legal and Historical Internet
 Archive System (BBC), 26–27
 National Library of New Zealand,
 106
 San Diego Supercomputer Center,
 157–158
- Balanced scorecard evaluations, 506–507
- Bath profile standard, 384
- BBC. *See* British Broadcasting
 Company
- Berge, Z. L., 274
- Best practices
 DSpace project, 9–10
 heritage collections, 165–166
 virtual reference, 389
- Biblionef (organization), 633–634
- Bibliothèque Nationale de France, 3,
 59, 82–87, 84*f*, 85*f*
- Big Deal journal agreements, 400–406,
 403*f*, 404*f*, 405*f*, 405*t*, 410*n*
- Bilal, Dania, 181, 183, 320, 322
- Bilingualism, 337
- Billings, John Shaw, 607–608
- Birds, 279
- Bishop's Park College library, UK, 530
- Bitstreams (PREMIS project), 117–118
- Blacksburg, VA, Electronic Village,
 268, 274
- Blair, D., 304
- Blind users, 344
- Blue Sky* (Huseinovic), 254–255
- Book House interface, 307–308
- Book of Hours* (manuscript), 35
- Book reviews. *See* Ratings and evalua-
 tions, children's books
- Books
 audio books, 419, 420, 422, 423
 book vendors, 435
 collection cooperation, 395–396
 library storage, 398–400
 print vs. digital design, 179–180, 183
 South African community-school
 library, 627
 textbooks, 413, 600
See also Children's books; E-books;
 Publications
- Borrow Direct consortia, 397–398
- Brain research, 191–192
- Branch libraries, 579
- Braun, Linda, 211
- British Broadcasting Company (BBC),
 2, 16–32
- British Columbia College and Institute
 Library Services (CILS), 423
- British Library
 deposit libraries, 19
 health libraries study, 598
- Broadcasting
 British Broadcasting Co., 16–31
 Educational Broadcasting Corp.,
 167–168
- Broadcasting Act of 1996 (UK), 17
- Broward County, FL, 571
- Browsing for information, 182
- Bücherschatz hyperlink catalog, 307–308
- Building the Information Core* (NHS,
 UK), 601
- Burren, Ireland, 280, 284*n*
- Business and industry
 heritage collection preservation, 169
 National Information Centres,
 India, 466–467
 Small Enterprises National
 Documentation Centre, India,
 477–478

- Worcester library and history center, UK, 539
- C**
- California
- King Library, San Jose, 489, 502, 505, 540–541, 542, 543, 544, 545, 546
 - San Diego Supercomputer Center, 13, 144, 155, 156*t*, 157, 157*t*, 158*t*, 159
 - Stanford University, 14*n*, 167
 - University of California, San Diego, 13
 - University of California, Santa Barbara, 167
- California Digital Library, 166–167
- California Northern Regional Library Facility, 399–400
- California State Library
- dual-use library guidelines, 505
 - Live Homework Help service, 209–210, 213–214
- Callington Library, England, 523
- Canada
- Canadian Charter of Rights and Freedoms, 415
 - copyright law, 416
 - History Trek portal, 324–326, 325*f*, 332, 334*f*, 335, 337
 - Libraries and Archives Canada, 458–459
 - Ontario School Curriculum Resource, 344, 448–460
 - Social Sciences and Humanities Research Council, 339
 - University of Winnipeg, 349, 357
- Canadian Association of Educational Resource Centres for Alternate Format Materials (CAER), 418–419
- Canadian Charter of Rights and Freedoms, 415
- Canadian Initiative on Digital Libraries (CIDL), 459
- Canadian National Institute for the Blind (CNIB), 417–418
- Canadian Union Catalogue of Alternative Format Materials (CANUC:H), 420
- Career planning, 237, 240
- Cartoons, Web portal design, 327
- Cataloging
- children's resources, 310
 - dual-use libraries, 544, 573
 - India, 482–483
 - MARC records, 384
 - Open WorldCat project, **430–447**
 - See also* OPACs; Union catalogs
- Categorization
- children's books, 251
 - digital environments, 291
 - Web portal design, 332
- CD-ROMs, 183
- CEDARS (Cuil Exemplars in Digital Archives), 92
- Celtic Tiger, 283*n*
- Censorship, 190
- Center for Research Libraries (CRL), 399
- Centre on Rural Documentation (CORD, India), 478
- Change strategies, 276, 276*t*
- Characters, Web portal design, 330–331, 338
- Charter, organization. *See* Mission and charter
- Chat rooms and message boards
- British Broadcasting Co., 18, 24
 - children and digital resources, 187–188
 - virtual reference, 213, 221, 223
 - Web portal design, 336
- Chicago, IL
- Chicago Public Library, 440, 442*f*, 443*f*
 - children and digital libraries, 248, 249*t*
- Child development
- children and digital resources, 176, **286–302**, **303–317**
 - young adult services, 210, 221–222
- Children
- digital reference, **228–244**
 - digital resources, **173–177**, **245–265**
 - information seeking behavior, **178–196**, **197–208**
 - South African community-school library, 629
 - Web portal use, **318–342**
- Children's Access to and Use of Computers Evaluation Project, 182, 186–187, 189

- Children's books
 children and digital libraries, **245–265**, 254*t*
 International Children's Digital Library, 205, 309
 South African community-school library, 634, 635–636
- Children's Internet Protection Act (CIPA, 1999), 190
- Children's libraries, 577, 587, 588, 589, 591
- Chippewa Valley High School, ID, 187–188
- Circulation
 College Hill Library, CO, 576
 King Library, San Jose, CA, 541
 library resource sharing, 395–398, 400
 West St. Petersburg Community Library, FL, 593–594
- Clare County, Ireland, 272, 279, 282, 284*n*
- Classroom activities
 children and digital libraries, 259
 South African community-school library, 627, 631
 technology use, 267, 272–282, 284*n*
- Cognition and cognitive development
 affective paradigm, 197–198, 199
 children and digital resources, 176, 292–293, 306
- Collections and collection development
 Big Deal journal agreements, 402
 digital preservation, 1, 2–3, 6–15, 57–71, 80–82, 81*f*
 dual-use libraries, 496, 591
 event-based, 82, 87
 heritage preservation, 165–166
 International Children's Digital Library, 248–250
 Joint Information Systems Committee, UK, 370
 library resource sharing, 396–397
 South African community-school library, 626–627, 634
See also Selection process
- College Hill Library, CO, **569–580**
- Colleges and universities
 college student research, 432
 consortia and repositories, 406
 digital content, 6, 7–9
 medical education, 597–599
 University Grants Commission, India, 473–475
See also Academic libraries
- Collins, M. P., 274
- Colorado
 College Hill Library, CO, 569–579
 Colors, Web portal design, 327, 336
- Combined Higher Education Software Team (CHEST, UK), 369
- Commonwealth Government Metadata Pilot Project, 68
- Communication styles
 children, 287, 294
 teenagers, 209, 216*t*, 217–221, 222–223, 227
- Communications Act (2003, UK), 17
- Communities
 children and digital resources, 188, 294
 community informatics, 268
 dual-use libraries, 492, 493–494, 497, 504, 512, **519–534**, 547
 Härnösand, Sweden, 556, 564
 Information Age Town project, 267, 279
 King Library, San Jose, CA, 546
 Maphotla, South Africa, 621, 623, 624, 625–626, 627, 631
 public libraries, 558–559
 Visby, Sweden, 555
 Worcester library and history center, UK, 536, 538–539
- Community college libraries, **569–580**, **581–595**
- Compression, file, 354
- Conference calls, 113
- Conference of European National Libraries (CENL), 43
- Conference proceedings, 67
- Configurability
 Ontario School Curriculum Resource, 454–455
 Open WorldCat program, 445–446
- Congress, U.S., 164
- Connectivity, digital environment, 186–188
- Consortia
 Big Deal agreements, 400–406, 410*n*
 Borrow Direct, 397–398

- DAISY, 422
- dual-use libraries, 495
- Electronic Information for
Libraries, 391
- Europe, 344, **359–381**
- HALton Information NETwork, 450
- India, 344, 467–476, 483
- International Internet Preservation
Consortium, 69–70
- OhioLINK project, 394–395, 399,
402–406, 403*f*, 404*f*, 405*f*, 405*t*,
406–409, 408*f*
- Ontario School Curriculum
Resource, 448–460
- resource sharing innovation,
382–383
- United Kingdom, 419
- ViewPoints Project, 407
- See also* Cooperation and
collaboration
- Consortium of Health Independent
Libraries (CHILL, UK), 368
- Consortium of Research Libraries
(CURL, UK), 368
- Consultative Committee for Space
Data Systems, 14*n*
- Consumer health information, 607–617
- Content creation
- digital preservation considerations,
145
 - digitization projects, 387–388
 - National Science Digital Library, 310
 - Ontario School Curriculum
Resource, 454
- Content versioning, 12
- Context
- decontextualization of digital
content, 31
 - hyperlinks in Web sites, 73
 - libraries and digital preservation, 1
- Contract negotiations
- Eduserv Chest, 368–369
 - Electronic Information for
Libraries, 375
 - European consortia, 371–374
 - Indian consortia, 469, 472–473,
474–475
 - Joint Information Systems
Committee, UK, 369, 370–371
 - Koninklijke Bibliotheek, 44–45
- Conversion, file formats
- British Broadcasting Co., 22, 28
 - electronic document exchange, 348
 - vs. emulation, 36
 - Global Digital Format Registry, 128,
129, 130*f*, 131*f*
 - Massachusetts Institute of
Technology Libraries, 9
 - prototype preservation environ-
ments, 145
 - Universal Virtual Computer, 37*f*
- Cooperation and collaboration
- children, 186–188, 204, 294
 - digital preservation, 38–40, 43, 60,
106, 108
 - European consortia, 360, 371–374,
378
 - expenditure effectiveness, **394–410**
 - International Internet Preservation
Consortium, 69–70
 - National Digital Information
Infrastructure and Preservation
Program, **163–172**
 - National Electronic Library
Program, Finland, 362
 - National Library of Australia, 64
 - Ontario School Curriculum
Resource, 455–460
 - Open WorldCat project, 434–436,
446
 - Persistent Archive Testbed, 160
 - PREMIS working group, 112–113
 - publishing companies, 390
 - resource sharing standards, 385
 - See also* Consortia; Dual-use libraries;
Library resource sharing
- Copies, multiple, 159
- Copyright and patent issues
- electronic content, 8
 - users with print disabilities, 415–416
- Costs and budget
- digital preservation, 52, 61, 62,
79–80, 106, 150–151
 - dual-use libraries, 503, 540–541,
574, 591
 - European consortia, 376, 377, 378
 - expenditure effectiveness, **394–410**
 - Hellenic Academic Libraries Link,
363
 - Indian consortia, 467–468, 469,
472–473
 - Indian libraries, 464, 480

- Costs and budget (*continued*)
 Information Age Town project, 272
 Joint Information Systems
 Committee, UK, 370
 National Electronic Information
 Consortium, Russia, 365
 postal service subsidies, 422
See also Funding
- Council of Scientific and Industrial
 Research Consortium (CSIR),
 471–473
- Counting Online Usage of Networked
 Electronic Resources
 (COUNTER), 385
Counting to Tar Beach (Ringgold), 254
- County Clare, Ireland, 279
- Course materials, 8
- Crawlers, Web content gathering, 74,
 76, 78, 83–86, 86*f*, 87*f*
- Crime, 187–188
- Critical Success Factors Method (CSF),
 509–510, 511–513, 513*t*
- Crossref service, 388
- Cuil Exemplars in Digital Archives
 (CEDARS), 92
- Cultural materials. *See* Heritage and
 culture, digital
- Curricula
 informal learning, 230, 236, 237
 Information Age Town project, 272,
 277, 278–281, 282
 Ontario School Curriculum
 Resource, 344, 448–449
- Cybercrime, 187–188
- Cyberkids, 179
- D
- DAISY Consortium, 422
- Damaged books. *See* Missing, damaged,
 or incomplete materials
- Data dictionary, PREMIS project,
 121–123, 122*f*, 123*n*
- Data entry, 455
- Data grids, 146–149, 147*f*, 150*f*,
 151–152
- Data loss and recovery, 96
- Databases
 Combined Higher Education
 Software Team, UK, 369
 digitization projects, 391
 health information, 602, 608–609,
 617*t*
 interface design, 308
 metadata, 314*n*
 Ph.D. theses, India, 475
 relational, 11
 remote access software, 385–386
- Day, Michael, 92
- Deep Web preservation, 81
- Defamatory materials, 18
- Defence Research and Development
 Organization (DRDO, India),
 478
- Defence Scientific Information
 and Documentation Centre
 (DESIDOC, India), 478
- Defense industry, India, 478
- Definitions
 access, 188
 community informatics, 268
 community-school libraries, 621
 connectivity, 186
 document delivery systems, 347
 dual-use libraries, 488–489
 focus groups, 322
 Global Digital Format Registry, 125
 informal learning, 229–230
 information behavior, 179
 interactivity, 183
 libraries, 550–552
 metadata representation, 304, 314*n*
 provenance, 119
sambibliotek, 566*n*
- Demographics
 dual-use library users, 490, 493, 529
 India, 463
 Maphotla, South Africa, 625–626, 629
- Dempsey, Lorcan, 92
- Denmark
 Book House interface, 307–308
 Nordic consortia, 372
 Royal Library of Denmark, 59–60
- Deposit libraries
 British Broadcasting Co., 18–19
 digital preservation, 57, 58
 Koninklijke Bibliotheek, 40
 National Library of Australia, 64
 Networked European Depository
 Library, 43
- Depot voor Nederlandse Electronische
 Publicaties (DNEP), 43
- Derby library, UK, 530
- Developing Library Network
 (DELNET, India), 479

- Development, children. *See* Child development
- Diffuse Project, 132
- Digital archiving. *See* Digital preservation
- Digital cameras, 278
- Digital Divide, 414
- Digital Information Archiving System (DIAS), 33–34, 45–52, 46*f*, 47*f*
- Digital libraries
- ARTEMIS Digital Library, 311–312, 338
 - Canadian Initiative on Digital Libraries, 459
 - children's response to, **245–265**, 309–310
 - dual-use libraries, 486
 - Indian National Digital Library in Science and Technology, 468–471
 - Information Age Town project, Ireland, 282
 - International Children's Digital Library, 205
 - National Electronic Library for Health, UK, 601
 - National Electronic Library Program, Finland, 360–362
 - OhioLINK project, 406–409
 - Ontario Digital Library, 456–457
- Digital Library Federation (DLF), 13–14, 125, 133, 133*t*, 141
- Digital Media Center (OhioLINK), 407
- Digital preservation, 1–172
- British Broadcasting Co., **16–32**
 - collections variety, **6–15**
 - Global Digital Format Registry, **125–143**
 - heritage libraries, **57–71**
 - Koninklijke Bibliotheek, **33–56**
 - methodology comparison, **72–90**
 - National Digital Information Infrastructure and Preservation Program, **163–172**
 - National Library of New Zealand, **91–110**, 102*f*, 104*f*
 - prototype environments, **144–162**
 - system design, 126*f*
- Digital reference. *See* Reference services
- Digital resources
- children's use of, **173–177**, **178–196**, 202, **286–302**, **303–317**
 - digitization projects, 387–388
 - Electronic Information for Libraries, 375
 - Joint Information Systems Committee, UK, 370
 - National Electronic Information Consortium, Russia, 366–367
 - National Electronic Library Program, Finland, 362
 - resource sharing networks, 344
 - UK consortia, 368–370
- Digital talking books, 422
- Digitization projects
- American Memory project, 458
 - Canadian Initiative on Digital Libraries, 459, 460
 - journal databases, 391
 - search engines, 387–388
 - users with print disabilities, 414
- Disability Discrimination Act of 1995 (UK), 415
- Disabled users, 344, **411–429**
- Discourse analysis, 216–217
- Dissemination Information Packages (DIP), 128–129
- Dissertations, 407, 408*f*
- Distributed processing. *See* Networked environment
- Diversity issues, 413–414
- DOCLINE system (NLM), 609, 610
- Doctors, 598
- Document delivery networks, 344, 346–347, 351, 476–479
- Documentation
- Global Digital Format Registry, 138
 - Web portal help files, 335
- Domain preservation, 61–63, 75–76
- Drehmer, U., 556
- Dresang, Eliza T., 182
- Druin, Allison, 186, 323
- DSpace project, 2, 7, 9–13, 153
- Dual-use libraries, **485–487**, **488–500**, 514*t*
- communities, **519–534**
 - evaluation of, **501–518**
 - health libraries, **596–606**, **607–619**
 - personnel issues, **581–595**
 - South Africa, **620–639**
 - strategic alliances, **535–548**
 - Sweden, **549–568**
- Dublin Core standard, 29
- Dutch Publishers Association, 41

- Dwyer, J., 516
 Dynamic Web sites
 British Broadcasting Co., 21–22
 digital preservation, 59, 66
 Dynix systems, 575
- E
- E-books
 International Children's Digital Library, 205, 247–252
 Project Gutenberg, 409*n*
- E-content. *See* Digital resources
- e-Depot (Koninklijke Bibliotheek system), 49–52, 50*f*, 51*f*
- E-journals. *See* Electronic journals;
 Journals
- EBSCO Publishing, 391
- EDEN (Electronic Document Exchange Network), 344, **346–358**
- Education and teaching
 children and Web portal design, 324, 336
 homework assistance, 209–210, 211–223
 informal education, **228–244**
 Information Age Town project, **266–285**, 274*f*, 276*t*
 library as classroom, 526
 medical, 597–599
 Ontario School Curriculum Resource, 449
 South Africa, 625, 631, 632
 Sweden, 555
 teacher-librarians, 491, 626, 634
 users with print disabilities, 413, 416, 418, 424
 writing skills, 184
 See also Classroom activities
- Educational Broadcasting Corp., 167–168
- Eduserv Chest, 368–369
- eIFL (Electronic Information for Libraries), 371, 374–376, 375*t*, 390–391
- Eircom, 267
- Elections, political, 75, 82, 83*t*, 84*f*, 85*f*, 86*f*, 87*f*
- Electronic commerce, 445
- Electronic Document Exchange Network (EDEN), 344, **346–358**
- Electronic Journal Center (OhioLINK), 403*f*, 404*f*, 405*f*, 405*t*
- Electronic journals
 Big Deal consortia agreements, 400–406, 403*f*, 404*f*, 405*f*, 405*t*, 410*n*
 Crossref service, 388
 European consortia, 378
 EzProxy software, 385–386
 health information, 602, 614–615
 Hellenic Academic Libraries Link, 363–364
 Indian consortia, 469, 470, 472, 474–475, 476
 Nordic consortia, 372–373
- Electronic publishing
 academic journals, 33, 34–35
 British Broadcasting Co., 21, 30
 colleges and universities, 8
 heritage collections, 58
 Internet volume, 6–7, 66, 72–73
- Electronic Theses and Dissertations Center (OhioLINK), 407, 408*f*
Elements of Writing About a Literary Work, 253, 265*t*
- Elsevier
 digitization projects, 391
 journal publishing, 34
 Koninklijke Bibliotheek partnership, 41
- Email
 PREMIS working group survey, 114
 virtual reference, 213
- Emory University, 168
- Emotional Design* (Norman), 199
- Emotions and feelings
 child development, 296–297
 children's books, 252, 254–255, 256*t*, 259
 See also Affective paradigm
- Employee benefits, 542, 586, 587
- Empowering the Learning Community* (report), 537–538
- Emulation, file formats
 DSpace project, 12
 Global Digital Format Registry, 129–130, 130*f*
 Koninklijke Bibliotheek, 36
 Legal and Historical Internet Archive System (BBC), 28
 Universal Virtual Computer, 37*f*
- Encryption, 356

- England. *See* United Kingdom
- English language
 English as a second language programs, 515
 Web portal design, 337
- Ennis, Ireland, **266–285**
- Entertainment and recreation
 Ardnamurchan school, Scotland, 532
 children and Web portal design, 324
 reading, 245–246
- Environmental influences on children, 290–291
- Erickson, E., 288
- Essex, UK, 530
- Europe
 library consortia, 344, **359–381**
 Networked European Depository Library, 43
- European Commission
 digital preservation initiatives, 37, 39
 Information Society Technologies Programme, 132
- Evaluation. *See* Assessment and review
- Event-based collections, 82, 87
- Excellence in Science, Technology, and Mathematics Education Week (ESTME), 231–232
- Extended schools concept (UK), 523, 533*n*
- EzProxy software, 385–386
- F
- Facilities. *See* Library buildings
- Fairclough, N., 217
- Farmers, 512, 513*t*, 514*t*
- Feelings. *See* Emotions and feelings
- File structure and names
 digital preservation system design, 146, 147–149, 152
 Legal and Historical Internet Archive System (BBC), 25
 PREMIS project, 117
- File transfer, 348–349, 350–351, 352, 354–357
- Filestreams (PREMIS project), 117–118
- “Find in a Library” program (OCLC), 437*f*, 439–443, 440*f*, 441*f*, 442*f*, 443*f*
- Finland
 FinELib (National Electronic Library Program), 360–362, 363*t*, 377
 Nordic consortia, 372
- First Class groupware, 280
- Fixity (PREMIS project), 120*f*
- Florida
 Broward County, 571
 dual-use libraries, 521
 West St. Petersburg Community Library, FL, 581–594
- Focus groups
 Open WorldCat project, 434
 Web portal design project, 322
- Fonts (Web portal design), 328–329
- Formative evaluations, 508
- Formats
 British Broadcasting Co. content, 17, 23, 30–31
 DSpace project, 10
 electronic document exchange, 348–349
 electronic vs. print content, 35–36, 467–468
 Global Digital Format Registry (GDFR), **125–143**, 137*t*
 heritage collections, 57–58, 63–64, 164, 169
 Joint Information Systems Committee, UK, 370
 PREMIS project, 116
 preservation metadata model, 98*f*
 standards, 7, 8–9
 users with print disabilities, 415, 417–418, 425–426
- France
 Bibliothèque Nationale de France, 3, 59, 82–87, 84*f*, 85*f*
- FRBR (Functional Requirements for Bibliographic Records), 439
- Fred (Format Registry Demonstrator), 141
- French language
 Web portal design, 337
- Front Range Community College, CO, 569–579
- Frustration and confusion
 children and digital resources, 201, 297
 dual-use library users, 490, 527
 virtual reference, 220
- FTP (File Transfer Protocol), 349
- Funding
 College Hill Library, CO, 570, 574
 digital preservation projects, 52–53, 97–98

Funding (*continued*)

- dual-use libraries, 489, 540, 541
- European consortia, 376–377
- Global Digital Format Registry, 140–141
- Indian libraries, 464, 482
- library cooperation, 458
- National Digital Information Infrastructure and Preservation Program, 164
- National Electronic Information Consortium, Russia, 365
- National Electronic Library Program, Finland, 360–361
- National Health Service libraries, UK, 600
- Ontario School Curriculum Resource, 450–453
- South African community-school library, 622, 627, 629
- West St. Petersburg Community Library, FL, 591
- See also* Costs and budget
- Funding agencies
 - dual-use libraries, 540
 - grant applications, 451
- Furnishings, library, 590
- G
- Games, Web portals, 337–338
- Garrett, John, 91–92, 108
- Gender issues, 182, 187
- Generic Electronic Document Interchange (GEDI), 347–348, 350, 352, 354–355, 357
- Geospatial information
 - National Geospatial Digital Archive, 167
 - North Carolina State University Libraries, 170
- Germany
 - Bücherschatz hyperlink catalog, 307–308
 - children and digital libraries, 248, 249*t*
- Global Digital Format Registry (GDFR), 4, 13–14, **125–143**, 134*f*, 136*t*
- Gòmez, C., 556
- Google Inc.
 - digitization projects, 387–388
 - Open WorldCat project, 435–436, 437, 438*f*
- Government publications
 - National Digital Information Infrastructure and Preservation Program, 167
 - National Library of Australia, 68
- Graesser, A. C., 232
- Grant applications, 451
- Graphics. *See* Images and visual content
- Grateful Med information service (NLM), 609–610
- Gray, John, 209
- Greece
 - Hellenic Academic Libraries Link, 362–364, 377, 378
- Gross, M., 182
- Grounded Theory, 271
- “Guidelines for Behavioral Performance of Reference and Information Service Providers” (RUSA), 214
- H
- HALton Information NETwork (HALINET), 450
- Hammerberg, D.D., 184
- Handheld hypertext, 183, 184
- Härnösand, Sweden, 554, 556–557, 564, 565
- Harvard University
 - Global Digital Format Registry, 133
 - high-density storage, 399
 - JHOVE, 14*n*, 101
- Haycock, Ken, 504
- Hazardous substances, 616
- HEAL-Link (Hellenic Academic Libraries Link), 362–364, 365*t*
- Health information
 - children informal learning, 237, 240
 - Consortium of Health Independent Libraries (CHILL, UK), 368
 - health libraries, 368, 486, **596–606**, **607–619**
- Health professionals, 596–605, 607–617
- Heery, Rachel, 92
- Help files, 335
- Helsinki University Library, 360
- Heritage and culture collections
 - American Memory project, 458
 - British Broadcasting Co., 19, 20

- digital preservation, 1, 57–71, 165–170
- Information Age Town project, Ireland, 279
- National Digital Information Infrastructure and Preservation Program, 163, 164
- National Library of Australia, 63–64, 65
- National Library of New Zealand, 92–93, 106, 107
- OhioLINK project, 407–408
- record of science, 34
- Sweden, 561
- Worcester library and history center, UK, 536
- High-density storage, 399–400
- Higher-order thinking skills, 293
- Hiring, dual-use libraries, 585–586
- Historical information
 - History Trek portal, 324–326, 325*f*
 - OhioLINK project, 407–408
 - Worcester library and history center, UK, 536
- History
 - Azalea Public Branch Library, FL, 582
 - book storage, 398–399
 - British Broadcasting Co. Web site, 20–21
 - children and digital resources, 174, 311
 - digital resources, 179
 - dual-use libraries, 485, 521, 551
 - electronic document exchange, 347–348
 - Ennis, Ireland, 267, 279
 - Generic Electronic Document Interchange, 357
 - Hellenic Academic Libraries Link, 363
 - heritage materials, 164
 - Internet, 169
 - Koninklijke Bibliotheek, 40
 - librarianship, 558–559, 561, 563
 - metadata, 91–92
 - National Electronic Information Consortium, Russia, 366
 - National Electronic Library Program, Finland, 360
 - National Health Service Trust libraries, UK, 596–597
 - National Library of Medicine, 607–608, 610–611
 - Ontario Digital Library, 456–457
 - Ontario School Curriculum Resource, 449
 - Open WorldCat project, 431
 - print resources, 179–180
 - scientific journal publishing, 34
 - Sweden, 550, 554, 556*n*
 - virtual reference, 212–213
 - Westminster, CO, 570
- History Trek portal, 324–326, 325*f*, 332, 334*f*, 335, 337
- Holds, library materials. *See* Requests for materials
- Holt, L.E., 182
- Homework assistance, 209–210, 211–223
 - See also* Education and teaching
- Honduras
 - children and digital libraries, 248, 249*t*
- Horgan, D., 232
- Hours of operation, 522, 526, 544, 587, 592–593, 632
- HTTP (Hypertext Transfer Protocol), 352
- Hultén, E., 556
- Human-computer interaction
 - affective paradigm, 198, 199
 - children and the Web, 200–203
- Hyperlinks, 77*f*, 78*f*
 - content in context, 73
 - crawlers, 74, 76–77
 - National Library of Medicine, 615–616, 616*f*
 - Open WorldCat project, 439, 443
- I
- IBM Corp., 33–34, 42–43, 44–45, 47
- Iceland
 - Nordic consortia, 372
- ICICI Bank Knowledge Park (India), 476
- Icons, Web portal design, 329
- Idaho
 - Chippewa Valley High School, 187–188
- IEEE (Institute of Electrical and Electronics Engineers), 314*n*
- ILL. *See* Interlibrary loan

Illinois

Chicago children and digital libraries, 248, 249*t*

Chicago Public Library, 440, 442*f*, 443*f*

Mid-Illinois Talking Book Center, 423

University of Illinois, 169

Illinois State Library Talking Books and Braille service, 423

Images and visual content

Art and Architecture Digital Media (OhioLINK), 408

Ask Jeeves for Kids, 331*f*

children's resources, 183–184, 204–205, 260–261, 289, 291, 292, 293, 295, 296, 326–329, 337–338

classroom photographs, 278

electronic publishing, 8

geospatial information, 167

History Trek portal, 325*f*

International Children's Digital Library, 250*f*

KidsClick interface, 329*f*

Lycos Zone, 328*f*

Science Digital Media (OhioLINK), 408

Tagged Image File Format, 132

Yahooligans!, 330*f*

IMLS (Institute of Museum and Library Services), 171

Implementation, systems

Electronic Document Exchange Network, 350, 352, 355

Global Digital Format Registry, 140

Koninklijke Bibliotheek project, 52

metadata decisions, 97

PREMIS working group, 114–115, 123

Implementing Preservation Repositories for Digital Materials: Current Practices and Emerging Trends in the Cultural Heritage Community (report), 114

Imposed queries, 230

Incomplete preservation. *See* Missing, damaged, or incomplete materials

Indexing and indexes

children's resources, 305

MEDLINE, 608–609

India

library resource sharing, 344, 463–484

Indian Council for Social Science Research (ICSSR), 477

Indian National Digital Library in Science and Technology (INDEST), 468–471

Indian Parliament Library, 483

Inductive analysis, 232–233, 241

Information Age Town project, Ireland, 266–285, 271*t*

Information and Library Network (INFLIBNET, India), 474–475, 478–479

Information desks, 588

Information Institute of Syracuse, 231–232

Information literacy

children, 181, 239–240, 287

health libraries, 598, 603–604

lifelong learning, 524

school library goals, 513*t*

South African community-school library, 634

Web literacy, 184

Information loss. *See* Missing, damaged, or incomplete materials

Information seeking behavior

children, 174–175, 178–196, 197–208, 230, 286, 288–289, 304, 305–313, 319

health information, 613–614, 615*t*

Open WorldCat project, 442–445

teenagers, 223, 227

Information Seeking Process model, 199, 206

Information services companies, 390–391

Information skills. *See* Information literacy

Information Society Technologies (IST) Programme, 132

Infotrieve Inc., 386

Infrastructure independence, 145–146, 147*f*

Ingenta Institute, 410*n*

iNQ browser, 154

Inquiry-based learning, 277

Institute of Electrical and Electronics Engineers (IEEE), 314*n*

Institute of Museum and Library Services (IMLS), 171

Instructional design, 239–240

Integrated library systems (ILS), 383

Interactive communication technology (ICT), 228–229

- Interactivity
 ARTEMIS Digital Library, 338
 children and digital resources,
 183–184, 293
 Web portal design, 336
See also Chat rooms and message
 boards
- Interlibrary loan (ILL)
 Electronic Document Exchange
 Network, 352
 National Library of Medicine, 608,
 609
 OhioLINK project, 395–398
 OpenILL Cooperative, 346, 349
- International Children's Digital
 Library (ICDL), 205, 247–252,
 250*f*, 262, 309
- International Coalition of Library
 Consortia (ICOLC), 371
- International Internet Preservation
 Consortium (IIPC), 69–70
- International issues
 children and digital libraries,
 245–265
 digital preservation, 39–40, 59–60
 International Internet Preservation
 Consortium, 69–70
 library consortia, **359–381**
 print disabled users, 344
- Internet and World Wide Web
 children's use of, 200–203, 303,
 318–319
 document delivery systems, 346–
 347, 350
 health information, 610
 history preservation, 169
 metadata, 308
 Open WorldCat project, 433
 publishing volume, 6–7
 resource sharing innovation,
 387–389
 teenager access, 211, 212–213,
 223–224
 users with print disabilities, 414
 Web literacy, 184
See also Web sites
- Internet Archive
 collection volume, 190
 coverage comparison, 84*f*, 85*f*
 whole domain preservation, 63,
 82–87
- Interoperability, 348, 352
- Interviews
 Critical Success Factors Method,
 511–513
 Information Age Town project, 270,
 271*t*
 Web portal design project, 321–322
- Ireland, Information Age Town,
266–285
- ISO standards, 349
- Iterative standard development, 350
- J
- J-Gate Custom Content for
 Consortium (JCCC), 469–470
- Joint Information Systems Committee
 (JISC, UK), 369–371
- Joint-use libraries. *See* Dual-use
 libraries
- Jones, Patrick, 210
- Journalists
 Poynder, Richard, 35
- Journals
 academic, 33
 Council of Scientific and Industrial
 Research Consortium, 472
 Koninklijke Bibliotheek project, 41
See also Electronic journals
- JSTOR Harvard Object Validation
 Environment (JHOVE), 14*n*, 101
- K
- KB. *See* Koninklijke Bibliotheek
- Kenney, Anne, 94
- Kepler workflow system, 153
- Keyword searching
 children and the Web, 205, 332–333
 Google, 438*f*
 Information Age Town project, 271
 Open WorldCat project, 437–438,
 442, 444*t*
 search-generated keywords, 311–312
- KidsClick interface, 308, 329*f*
- King Library (San Jose, CA), 502, 505,
 540–541, 542, 543, 544, 545, 546
- Knowledge
 anomalous state of, 197–198
 children and digital resources, 291
 theories of librarianship, 551, 558
- Koninklijke Bibliotheek (KB), 2,
33–56, 60
- Kuhlthau, C.C., 198, 206, 223
- Kulturarw3 (archiving project), 80

L

- Laboratories, information, 471–473
- Lang, K., 232
- Languages
 children and digital resources, 257, 292
 digital videos, 407
 European consortia, 359
 Information Age Town project, 277, 284*n*
 International Children's Digital Library, 248–250
 language instruction, 515
 metadata representation, 304–305
 Web portal design, 337
- Leadership
 dual-use libraries, 583–584, 587, 590
 library cooperation, 458
- Learning
 affective paradigm, 198
 children and technology, 287, 288, 289–290, 292, 305
 formal vs. informal, 229–231
 Information Age Town project, 273, 277
 learning disabilities, 414
 lifelong learning, 523–524
- Learning Object Metadata (LOM), 314*n*
- Legal and Historical Internet Archive System (BBC), 19, 22–30
- Legal Deposit Libraries Act of 2003 (UK), 18–19
- Legal issues
 British Broadcasting Co., 17–19, 24, 28
 dual-use library agreements, 494, 503, 505–506, 585–586
 electronic content, 8
 National Electronic Information Consortium, Russia, 366
See also Service agreements
- Legislation
 Americans with Disabilities Act of 1990, 415
 Broadcasting Act of 1996 (UK), 17
 Canadian Charter of Rights and Freedoms, 415
 Children's Internet Protection Act (1999), 190
 Communications Act (2003, UK), 17
 Disability Discrimination Act of 1995 (UK), 415
 Legal Deposit Libraries Act of 2003 (UK), 18–19
 National Digital Information Infrastructure and Preservation Program, 164
 national library, New Zealand, 92–93
 Rehabilitation Act of 1973, 415
 South African community-school libraries, 622
 Special Educational Need and Disability Act (2001, UK), 415
- Leutner, D., 297
- Liability, legal, 18
- Librarians
 Billings, John Shaw, 607–608
 College Hill Library, CO, 575
 dual-use libraries, 495–496, 504, 510, 517, 542
 electronic journals use, 402
 health information, 609
 online reference, 209–227, 216*t*, 241–242
 Sears, Minnie Earl, 311
 South African community-school library, 626
 teacher-librarians, 491, 626, 634
 users with print disabilities, 413–414, 424
 West St. Petersburg Community Library, FL, 585–586, 588–589, 590
- Librarianship, 549, 550–553, 558–565
- Libraries and Archives Canada (LAC), 458–459
- Library boards of directors, 494, 624, 632, 636
- Library buildings
 book storage, 398–400
 College Hill Library, CO, 572–574, 576
 dual-use libraries, 494–495, 522–523, 528
 South African community-school library, 626, 627, 637
 Worcester, UK, 538–539
- Library cards, 480–481
- Library design, 526, 531, 532, 573, 588, 589–590

- Library Information Network for Community Colleges (LINCC), 593
Library Networks in the New Millennium: Top Ten Trends (Hyman), 383
- Library of Congress
 American Memory project, 458
 Annotated Card program, 311, 314*n*
 digital preservation, 59
 Metadata Objects Description Schema, 314*n*
 National Digital Information Infrastructure and Preservation Program, **163–172**
 National Library Service for the Blind and Physically Handicapped, 417, 420
- Library policies, 494, 506, 594
- Library resource sharing, 343–345, **382–393**
 Electronic Document Exchange Network, **346–358**
 European consortia, **359–381**
 expenditure effectiveness, **394–410**
 India, **463–484**
 Ontario School Curriculum Resource, **448–462**
 users with print disabilities, **411–429**
See also Cooperation and collaboration
- Licensing agreements
 Combined Higher Education Software Team, UK, 369
 European consortia, 371–374, 376–377, 378
 Hellenic Academic Libraries Link, 364
 Joint Information Systems Committee, UK, 369, 370–371
 National Electronic Information Consortium, Russia, 366
- Lichfield library, UK, 542
- Lifelong learning, 230, 523–524
- Ligue des Bibliothèques Européennes de Recherche (LIBER), 371
- Linguists, 304
- Linking. *See* Hyperlinks
- Literacy. *See* Reading and literacy
- Literary transactions, 246–247
- Live Homework Help service, 209–210, 213–214
- Loansome Doc software, 610
- Local branding, 449–450, 454–455
- Local governments, 170–171
- LOCKSS project, 14*n*
- Logical storage systems, 147–149
- Lorie, Raymond, 36
- Lycos Zone, 328*f*
- Lynch, Clifford, 119
- M
- Mail. *See* Postal service
- Management Libraries Network (MANLIBNET, India), 471, 480–481
- Manifestations (FRBR), 439, 441*f*
- Maori language, 109*n*
- Maphota, South Africa, 620, 628, 629–630
- MARC (Machine-Readable Cataloging) standard, 384
- March, J.G., 560
- Martin Luther King, Jr. Library. *See* King Library (San Jose, CA)
- Maryland
 University of Maryland, 158*f*, 159, 169
- Mascots, Web interface design, 330–331, 336
- Massachusetts
 Harvard University, 14*n*, 101, 133, 399
 WGBH Boston, 168
- Massachusetts Institute of Technology
 Affective Computing Research Group, 199
 Libraries and Archives, 2, 7, 9–14, 153
- McGinty, Celia, 187–188
- Medical libraries, 368, 486, **596–606**, **607–619**
- Medical professionals, 596–605, 607–617
- MEDLINE index, 608–609
- MEDLINE/PubMed, 611, 612–614, 613*t*, 614*t*, 615*t*, 616*f*
- MedlinePlus.gov, 611–617, 613*t*, 614*t*, 615*t*, 616*f*
- Men Are from Mars, Women Are from Venus: The Classic Guide to Understanding the Opposite Sex* (Gray), 209
- MeSH (Medical Subject Headings), 616
- Message boards. *See* Chat rooms and message boards
- MetaArchive of Southern Digital Culture, 168

Metadata

- children's resources, 303–317
- DSpace project, 11
- electronic document exchange, 354–355
- Global Digital Format Registry, 13–14, 128, 131–141, 136*t*, 137*t*, 138*t*
- Koninklijke Bibliotheek, 48
- Legal and Historical Internet Archive System (BBC), 29–30
- National Library of Australia, 68
- National Library of New Zealand, 91–110, 98*f*, 100*f*
- Open WorldCat project, 439
- preservation metadata, 3, 145, 150*f*
- Preservation Metadata Implementation Strategies, 111–124
- Standard Media Exchange Framework, 26
- Storage Resource Broker initiative, 13
- technical metadata, 4
- Metadata Encoding and Transmission Standard (METS), 123
- A Metadata Framework to Support the Preservation of Digital Objects* (report), 112
- Metadata Objects Description Schema (MODS), 314*n*
- Metaphors, Web interface design, 326
- Methodology
 - children and digital libraries, 247–248, 249*t*, 251–257, 259, 260
 - digital preservation selection, 59–60, 61–63, 72–90, 79*f*
 - dual-use library evaluation, 506–507, 508, 509–510, 511–513
 - dual-use library field study, 582–583, 621
 - Information Age Town project, 268–271, 269*t*
 - PREMIS working group, 115–116
 - preservation metadata, 94, 99–103, 100*f*
 - virtual reference research, 214–221, 231–238, 241
 - Web portal design, 320–323
- Meyers, M., 210
- Michigan. *See* University of Michigan
- Mid-Illinois Talking Book Center, 423
- MIME (Multipurpose Internet Mail Extensions), 132
- Missing, damaged, or incomplete materials
 - digital preservation, 62, 129, 157–158, 157*t*
 - Indian libraries, 481
 - Legal and Historical Internet Archive System (BBC), 26
 - metadata, 96, 107
- Mission and charter
 - British Broadcasting Co., 20
 - Canadian Initiative on Digital Libraries, 459
 - dual-use libraries, 489, 556
 - Joint Information Systems Committee, UK, 369
 - Libraries and Archives Canada, 458–459
 - National Information System in Science and Technology, 465
 - National Library of New Zealand, 92–93
 - Ontario School Curriculum Resource, 451
 - Open WorldCat project, 431
 - PREMIS working group, 112
 - Sambiblioteket, Sweden, 564
 - University of Worcester, 538
- Missouri
 - St. Louis Public Library, 182, 186–187, 189
- MIT. *See* Massachusetts Institute of Technology
- Models
 - digital preservation system design, 46*f*, 47*f*
 - dual-use libraries, 638
 - Information Seeking Process, 199, 206
 - preservation metadata, 94, 98*f*, 116–119, 120*f*, 121*f*, 122*f*, 135–140
 - Modular system design, 353–354
 - Montgomery School System, VA, 268, 274
 - Mortality, 238
 - Motor skills, 290
 - Mouse (computer controllers), 290
 - Moving Theory into Practice: Digital Imaging for Libraries and Archives* (Kenney and Reiger), 94
 - Mpumalanga, South Africa, 620, 628–629

- Multimedia content, 8
See also Audio and sound content;
 Images and visual content; Video
 Music, traditional Irish, 279
- N
- Names, Web portals, 329–330
- National Archives and Records
 Administration (NARA), 144, 158*f*
- National Association for the Education
 of Young Children (NAEYC), 287
- National Bibliographic Database
 (NBD), 68
- National Core Content Collection
 (UK), 602
- National Digital Information Infra-
 structure and Preservation Pro-
 gram (NDIIPP), 4, 133, **163–172**
- National Electronic Information
 Consortium (NEICON, Russia),
 364–367, 365*t*, 373
- National Electronic Library for Health
 (NeLH, UK), 601
- National Electronic Library Interface
 (Nelli), 362
- National Geospatial Digital Archive
 (NGDA), 167
- National Health Service Trust libraries
 (NHS, UK), 596–605
- National Information System in
 Science and Technology
 (NISSAT), 465–467
- National Institute of Rural Develop-
 ment (NIRD, India), 478
- National Institute of Science
 Communication and
 Information Resources
 (NISCAIR, India), 477
- National Institute of Small Industries
 Extension and Training Institute
 (NISJET, India), 477–478
- National libraries
 Conference of European National
 Libraries, 43
 digital preservation, 2–3, 57, 59–60,
 62
 Indian National Digital Library
 in Science and Technology,
 468–471
 International Internet Preservation
 Consortium, 69–70
 Koninklijke Bibliotheek, 33–53
 Libraries and Archives Canada,
 458–459
 National Electronic Library for
 Health, UK, 601
 National Electronic Library
 Program, Finland, 360–362
 National Science Library of India, 477
 Nordic consortia, 372
 National Library of Australia, 2–3, 63–68
 National Library of Medicine (NLM),
607–619, 617*t*
 National Library of New Zealand
 (NLNZ), 3, **91–110**
 National Library of the Netherlands. *See*
 Koninklijke Bibliotheek (KB)
 National Library Service for the Blind
 and Physically Handicapped
 (NLS), 417, 420
 National Science Digital Library
 (NSDL), 309–310
 National Science Foundation (NSF)
 digital reference service, 231–232
 Division of Informal Science
 Education, 229
 Storage Resource Broker initiative,
 156*t*
 National Science Library of India, 477
 National Social Science
 Documentation Centre
 (NASSDOC, India), 477
 Natural disasters, 158
 Natural-language searching, 205, 332
 Negroponte, Nicholas, 179
 Netherlands
 Koninklijke Bibliotheek, 2, 33–53, 60
 Networked environment
 College Hill Library, CO, 574–575
 digital preservation resources, 4
 Global Digital Format Registry, 134,
 134*f*
 Legal and Historical Internet
 Archive System (BBC), 27
 Management Libraries Network,
 India, 471
 persistent archives, 144
 resource sharing innovation, 383
 South African community-school
 library, 628
 Storage Resource Broker initiative, 13
 Networked European Depository
 Library (NEDLIB), 43, 52
 Neuroscience, 191–192

- New Directions for Library Service to Young Adults* (Jones), 210
- New Jersey
Rutgers University School of Communication, Information and Library Studies, 283
- New York
Information Institute of Syracuse, 231–232
New York University, 168
Ramapo Catskill Library System, 308
Thirteen/WNET, 167–168
- New Zealand
children and digital libraries, 248, 249*t*, 259
National Library of New Zealand, 3, 91–109
Upper Riccarton library, 530
- News and newspapers, 24
- NISO (National Information Standards Organization), 384–385
- Nonlinear thinking, children, 184
- Nonprofit organizations
Biblioref, 633–634
Counting Online Usage of Networked Electronic Resources, 385
Eduserv Chest, 368–369
Electronic Information for Libraries, 371, 374–376, 375*t*, 390–391
Recording for the Blind and Dyslexic, 420
- Nonverbal communication, 220–221
- Nordic consortia, 372–373, 374
- Nordic Web Archive, 62
- Norman, D., 199
- Normative institutionalism, 549, 559–560
- North Carolina State University Libraries, 170
- North West Academic Libraries (NoWAL, England), 367
- Norway
dual-use libraries, 527, 531
Nordic consortia, 372
- Nursing education, 597–598
- Nvivo software, 271
- O
- OAI-PMH (Open Archives Initiative-Protocol for Metadata Harvesting), 153
- OAIS. *See* Open Archival Information System
- Observation (research method), 321
- Obsolescence, digital formats, 35–36
- OCLC (Online Computer Library Center)
Open WorldCat project, 344–345, 388, **430–447**
PREMIS working group, 111–112
Subject Headings for Children, 311
- OhioLINK project, 344, 394–395, 402–406, 403*f*, 404*f*, 405*f*, 405*t*, 406–409, 408*f*
- Olausson, C., 555–556
- Olsen, J.P., 560
- Omagh, Northern Ireland, 273
- One Place to Look* (Ontario Digital Library), 456
- Online books. *See* E-books
- Online reference. *See* Reference services
- Ontario Digital Library (ODL), 456–457
- Ontario School Curriculum Resource (OSCR), 344, **448–462**
- OPACs
children's use of, 307–309
College Hill Library, CO, 575
"Find in a Library" program (OCLC), 440
West St. Petersburg Community Library, FL, 593
- Open Archival Information System (OAIS), 4
DSpace project, 11
Global Digital Format Registry, 125
Koninklijke Bibliotheek project, 45–46, 46*f*, 52
NEDLIB project, 43
PREMIS working group, 112, 115
reference model, 14*n*
- Open Society Institute (OSI), 374, 391
- Open source software
DSpace project, 9, 13
Electronic Document Exchange Network, 347
LOCKSS project, 14*n*
Ontario School Curriculum Resource, 455
resource sharing innovation, 386–387

- Open WorldCat project (OCLC), 344–345, 388, **430–447**, 437*f*, 440*f*, 441*f*, 442*f*, 443*f*, 444*t*, 445*f*
- OpenILL Cooperative, 346, 349
- Oregon State Library, 417
- Outreach. *See* Publicity and outreach
- P
- PANDORA Project, 2–3, 63–68
- Pantaleo, S., 184
- Parking, dual-use libraries, 495, 576
- Parliamentary elections, 82, 83*t*, 85*f*, 86*f*, 87*f*
- Patents. *See* Copyright and patent issues
- PBS (Public Broadcasting Service), 168
- Pennsylvania
University of Pennsylvania Library, 141
- Permanent access solutions, 36, 37–38, 38*f*
- Permanent Access Toolbox for Digital Cultural Heritage (PATCH), 37–38, 53–54*n*
- Permanent Access Toolbox (PATbox), 37–38, 38*f*
- Persistent Archive Testbed (NARA), 144, 158*f*, 159–160
- A Personal Electronic Teller of Stories (PETS), 297
- Personalization
virtual reference services, 221
Web portal design, 336
- Personnel. *See* Librarians; Staff, library
- Peters, Guy, 560
- Ph.D. theses, 475
- Photographs, classroom, 278
- Physiology, 191–192
- Piaget, J., 288
- Picture books, 184
- Pilot projects and trials
Commonwealth Government
Metadata Pilot Project, 68
Koninklijke Bibliotheek, 42–43
PREMIS project, 123
South African community-school library, **620–639**
See also Prototypes
- Pinnaroo School Community Library (Australia), 506
- Planning
College Hill Library, CO, 570
dual-use libraries, 493–494, 503–504, 505, 508–509, 513–515, 514*t*, 530, 547
South African community-school library, 623–624, 630
West St. Petersburg Community Library, FL, 590
- Play (child development), 290
- Polaris system, 593
- Politics and political science
dual-use libraries, 521–522, 538, 551, 559–560, 562, 563, 622, 628
elections, 75, 82, 83*t*, 84*f*, 85*f*, 86*f*, 87*f*
- Poole, H.L., 181
- Portree library (Scotland), 520
- Postal service
materials for the blind, 422
National Library of Medicine materials, 608
- Potter, William, 458
- Poynder, Richard, 35
- Precision and recall, 333–335
- PREMIS (Preservation Metadata Implementation Strategies)
working group, 3, **111–124**, 120*f*, 121*f*, 122*f*
- Preservation and conservation, 391
See also Digital preservation
- Preservation Metadata Framework Working Group, 112
- Presidential elections, 82, 83*t*, 84*f*, 86*f*, 87*f*
- Principals, school
dual-use libraries, 495, 511, 628
Information Age Town project, 275
- Principle of Least Effort, 181
- Print disabilities, 344, **411–429**
- Print materials
British Broadcasting Co., 17
children's use of, 202
design influenced by digital, 179–180, 183–184
different than electronic, 35, 164
digitization, 391, 409*n*
Indian consortia, 467–468
journal subscriptions, 363, 372–373, 401–402, 403*f*
National Health Service Trust libraries, 601
National Library of Australia, 65
storage, 398–400

- Probationary employment, 587–588
- Probst, R. E., 246
- Programmers, computer, 455
- Project CATE (Children's Access to and Use of Computers Evaluation), 182, 186–187, 189
- Project Gutenberg, 409*n*
- Project management
- Legal and Historical Internet Archive System (BBC), 26–27
 - National Digital Information Infrastructure and Preservation Program, 166
 - PREMIS working group, 113
- PRONOM system (UK National Archives), 132
- Prototypes
- Fred (Format Registry Demonstrator), 141
 - Open WorldCat project, 434
 - preservation environments, **144–162**
 - Web portal design project, 323, 339
 - See also* Pilot projects and trials
- Provenance
- definition, 119
 - DSPACE project metadata, 11
 - prototype preservation environments, 145, 149
 - trusted digital repositories, 107
- Provincial libraries
- Ontario Digital Library (ODL), 456–457
- Psychology
- affective paradigm, 197, 198
 - children and digital resources, 176
- Public and School Libraries: Issues and Options of Joint Use Facilities and Cooperative Use Agreements* (California State Library), 505
- Public libraries
- Chicago Public Library, 440
 - children and digital resources, 193
 - Clare County Library, Ireland, 282
 - dual-use libraries, 486, 488–498, 502, 510, 511–512, 513*t*, 515–516, 517, **519–534**, 542, 546, 549–565, **569–580**, **581–595**, **620–639**
 - Ontario Digital Library, 456–457
 - Ramapo Catskill Library System, NY, 308
 - St. Louis Public Library, MO, 182, 186–187, 189
 - teenage users, 210, 212
 - The Library Cooperative (TLC), 449
 - users with print disabilities, 413, 417
- Public policy, 521–522, 538, 561–562, 566*n*
- Public registries, 131–132, 141
- Publications
- Blue Sky* (Huseinovic), 254–255
 - Building the Information Core*, 601
 - Counting to Tar Beach* (Ringgold), 254
 - Emotional Design* (Norman), 199
 - Library Networks in the New Millennium: Top Ten Trends* (Hyman), 383
 - Men Are from Mars, Women Are from Venus: The Classic Guide to Understanding the Opposite Sex* (Gray), 209
 - Moving Theory into Practice: Digital Imaging for Libraries and Archives* (Kenney and Reiger), 94
 - One Place to Look* (Ontario Digital Library), 456
 - Public and School Libraries: Issues and Options of Joint Use Facilities and Cooperative Use Agreements* (California State Library), 505
 - Systematic Evaluation: A Self-Instructional Guide to Theory and Practice*, 506
 - The 2003 OCLC Environmental Scan: Pattern Recognition* (Wilson), 382–383
- Publicity and outreach
- dual-use libraries, 529–530, 577, 627, 631
 - health libraries, 603
- Publishing companies
- archiving, 41–42, 53*n*, 60
 - Big Deal consortia agreements, 401
 - Elsevier, 34
 - resource sharing innovation, 390–391
 - users with print disabilities, 419–420, 421, 424
- Puppets, Web interface design, 338
- Purves, A. C., 247, 253, 265*t*
- Q
- Quality assurance, 128

- R
- Radical Change theory, 178, 179–180, 183
- Radio, 17
- Railroads, 279
- Ramapo Catskill Library System, NY, 308
- Ratings and evaluations, children's
books, 251, 252, 254*t*, 255–256, 256*t*, 257, 258–259, 264
- Reader response theory, 246–247, 253, 256–257, 257*t*, 259, 260–261, 265*t*
- Reading and literacy
book design, 184, 185
children and digital resources, **245–265**, 291, 292, 296
Maphota, South Africa, 623, 630, 637
school library goals, 511, 513*t*, 514*t*
- Recall and precision, 333–335
- Recording for the Blind and Dyslexic (RFB&D), 420
- Recreation. *See* Entertainment and recreation
- RedLightGreen union catalog, 388–389
- Redundancy, data, 106
- Reference and User Services Association (RUSA), 214
- Reference interviews, 214, 218–221
- Reference services
children and digital reference, 175, **228–244**
dual-use libraries, 588–589
King Library, San Jose, CA, 543, 544
Open WorldCat project, 444
resource sharing innovation, 389
teenagers and online reference, **209–227**, 215*t*, 216*t*
- Reference Workstation (RefWS), 54*n*
- Regional consortia and networks
dual-use libraries, 495
England, 367
India, 467, 479
Nordic consortia, 373–374, 375
- Regional Medical Library Network (RML), 608
- Rehabilitation Act of 1973, 415
- Reiger, Oya, 94
- Relationships, metadata, 118–119
- Remote access
alternate format materials, 413
EzProxy software, 385–386
health libraries, 601, 608
- Reports
British Broadcasting Co., 20
Empowering the Learning Community, 537–538
Implementing Preservation Repositories for Digital Materials: Current Practices and Emerging Trends in the Cultural Heritage Community, 114
Legal and Historical Internet Archive System (BBC), 28
A Metadata Framework to Support the Preservation of Digital Objects, 112
National Health Service Trust, UK, 599
National Library of Australia, 106
National Library of New Zealand, 106
PREMIS project, 121–122
preservation metadata, 91–92
Users First: Removing Barriers to Knowledge Access Across HE and the NHS, 602
See also Annual reports
- Representation information. *See* Metadata
- Requests for materials
National Library of Medicine, 608, 609, 610
OhioLINK project, 396–397, 400
- Requests for proposals, 165
- Research
affective paradigm, 198–203
children and digital libraries, 246–260, 249*t*
children informal learning, 229, 231–242
children information seeking, 178–193, 305–312
circulation statistics, 395–396
Consortium of Research Libraries, UK, 368
Council of Scientific and Industrial Research Consortium, India, 471–473
dual-use libraries, 491–492, 493, 496–497, 505, 530, 542, 621
health libraries, 598
Information Age Town project, 268–282, 269*t*
Open WorldCat project, 432–436
Radical Change theory, 178
virtual reference, 212–221
Web interface design, 319–320, 337–338

- Research libraries. *See* Academic libraries
- Research Libraries Group (RLG)
 Ariel software, 347
 PREMIS working group, 111–112
 RedLightGreen union catalog,
 388–389
- Researchers
 Agarwal, P., 467, 468
 Amey, Larry, 506
 Arora, J., 467, 468
 Astleitner, H., 297
 Berge, Z.L., 274
 Bilal, Dania, 181, 183, 320, 322
 Blair, D., 304
 Braun, Linda, 211
 Collins, M.P., 274
 Day, Michael, 92
 Dempsey, Lorcan, 92
 Drehmer, U., 556
 Dresang, Eliza T., 182
 Druin, Allison, 186, 323
 Dwyer, J., 516
 Erickson, E., 288
 Fairclough, N., 217
 Garrett, John, 91–92, 108
 Gómez, C., 556
 Graesser, A.C., 232
 Gross, M., 182
 Hammerberg, D.D., 184
 Haycock, Ken, 504
 Heery, Rachel, 92
 Holt, L.E., 182
 Horgan, D., 232
 Hultén, E., 556
 Jones, Patrick, 210
 Kenney, Anne, 94
 Kuhlthau, C.C., 198, 206, 223
 Lang, K., 232
 Leutner, D., 297
 Lorie, Raymond, 36
 Lynch, Clifford, 119
 March, J.G., 560
 Meyers, M., 210
 Negroponte, Nicholas, 179
 Norman, D., 199
 Olausson, C., 555–556
 Olsen, J.P., 560
 Pantaleo, S., 184
 Peters, Guy, 560
 Piaget, J., 288
 Poole, H.L., 181
 Potter, William, 458
 Probst, R.E., 246
 Purves, A.C., 247, 253, 265*t*
 Reiger, Oya, 94
 Rippere, A., 253, 265*t*
 Shera, Jesse, 551, 558
 Shinkfield, A., 506
 Stufflebeam, D., 506
 Todd, R.J., 181
 Vandergrift, K.E., 247
 Walter, V.A., 210
 Waters, Donald, 91–92, 108
 Watson, J.S., 200
- Researchers Requirements Working
 Group (IIPC), 69–70
- Resource Description Framework
 (RDF), 11
- Restricted access. *See* Access issues
- Results display (Web portals),
 333–335, 334*f*, 438*f*, 439, 441*f*,
 442*f*, 443*f*
- Reusable content, 24
- Revealweb (UK), 420–421
- Rippere, A., 253, 265*t*
- Risk management, 157*t*
- Royal Library of Denmark, 59–60
- Rural communities
 dual-use libraries, 493, 512
 India, 478
 Information Age Town project,
 267–268
 South African community-school
 library, **620–639**
 Sweden, 554
- Russia
 NEICON (National Electronic
 Information Consortium), 364–
 367, 373, 377
- Rutgers University School of
 Communication, Information
 and Library Studies, 283
- S
- Salaries, library, 587
- Sambibliotek*, 566*n*
- Sambiblioteket, Sweden, 554, 556–557,
 564, 565
- San Diego Supercomputer Center
 (SDSC)
 prototype preservation environ-
 ments, 144
- Storage Resource Broker initiative,
 13, 155, 156*t*, 157, 157*t*, 158*t*, 159

- San Jose Public Library. *See* King Library (San Jose, CA)
- San Jose State University Library. *See* King Library (San Jose, CA)
- Scalability
- Electronic Document Exchange Network, 352
 - Storage Resource Broker initiative, 155, 156*t*
- Scheduling, library staff, 588–589, 592–593
- School-housed public libraries, 490, 495, 502, 510, 515, 531
- access issues, 526
 - Australia, 506, 521
 - Portree library, Scotland, 520
 - Sweden, 550
 - United Kingdom, 522, 523, 525–526
- School libraries
- Azalea Public Branch Library, FL, 582, 586–587
 - dual-use libraries, 486–487, 488–498, 502, 510–511, 516, 537
 - goals, 511, 513*t*
 - Information Age Town project, Ireland, 282
 - Ontario Digital Library, 457
 - South African community-school library, **620–639**
- School Register of Needs Survey*, South Africa, 624–625
- Schools
- dual-use libraries, 490–491, 528, 586
 - Information Age Town project, 267, 270, 272–283
 - South Africa, 624–625, 635
- Scientific information
- children and reference service, 231–238
 - Council of Scientific and Industrial Research Consortium, India, 471–473
 - Defence Scientific Information and Documentation Centre, India, 478
 - electronic publishing, 8, 34
 - Indian National Digital Library in Science and Technology, 468–471
 - Information Age Town project, Ireland, 280
 - National Electronic Information Consortium, Russia, 365
 - National Information Centres, India, 466–467
 - National Institute of Science Communication and Information Resources, India, 477
 - Science Digital Media (OhioLINK), 408
 - Thomson Web of Science, 391
- Scotland
- Ardnamurchan school, 531–532
 - Portree library, 520
- Search engines. *See* Web portals and search engines
- Search-generated keywords, 311–312
- Searching techniques
- children, 182, 205, 306–307, 313, 332–333, 335
 - college students, 432
 - health information, 611, 614–615
 - Open WorldCat project, 442–443, 444*t*
- See also* Keyword searching
- Sears, Minnie Earl, 311
- Sears List of Subject Headings, 311
- Sectoral Information Centres (SIC, India), 466–467
- Security and permissions
- British Broadcasting Co., 24–25
 - digital preservation system design, 148, 149
 - dual-use libraries, 495, 527
 - Electronic Document Exchange Network, 356–357
 - Koninklijke Bibliotheek project, 42
 - Shibboleth authentication, 389
 - Web portal design, 336
 - whole domain archives, 62
- Sei Chi'mupanze Ane Mhanza* (Mbarga, Ndhlovu), 257
- Selection process
- Big Deal journal agreements, 402
 - digital preservation, 2–3, 59–61, 63, 65, 165–166
 - National Electronic Library Program, Finland, 362
 - National Library of Australia, 65–67
- See also* Collections and collection development
- Seminole Community Library, FL, 581
- Seniors, 512, 513*t*, 514*t*

- Service agreements
 National Electronic Library
 Program, Finland, 361
 South African community-school
 library, 633
See also Legal issues
- Share the Vision project, 418
- Shelving
 dual-use library arrangement, 526,
 541, 573, 591
 storage savings, 400
- Shera, Jesse, 551, 558
- Shibboleth authentication, 389
- Shinkfield, A., 506
- Small Enterprises National
 Documentation Centre
 (SENDOC, India), 477–478
- Social behavior, 186–187, 294–295
- Social science information
 heritage collection preservation, 170
 National Social Science
 Documentation Centre, India,
 477
 Social Sciences Digital Media
 (OhioLINK), 408
- Social Sciences and Humanities Re-
 search Council (Canada), 339
- Software
 Ariel, 347, 386
 EzProxy, 385–386
 First Class, 280
 Loansome Doc, 610
 Nvivo, 271
 Ontario School Curriculum
 Resource, 455
 resource sharing innovation, 386–
 387, 390
 virtual reference, 389
See also System development and
 design
- Software licensing
 Combined Higher Education
 Software Team (CHEST, UK), 369
 digital preservation, 19–20
- Sound files. *See* Audio and sound
 content
- South European Libraries Link
 (SELL), 373
- Southern culture and history, 168
- Spanish MedLinePlus, 616
- Special Educational Need and
 Disability Act (2001, UK), 415
- Special needs children, 277–278
- Spelling skills, 332–333
- Spiders, Web content gathering, 74
- Sports and competitions
 Ireland, 275–276
 Scotland, 532
- St. Louis Public Library, MO, 182,
 186–187
- St. Petersburg, FL, 581, 584
- Staff, library
 College Hill Library, CO, 575–576
 dual-use libraries, 504, 517, 542–
 544, 545
 European consortia, 377
 Koninklijke Bibliotheek, 40
 National Library of New Zealand, 105
 South African community-school
 library, 622–623, 626, 627–628
 West St. Petersburg Community
 Library, FL, **581–595**
- Staffordshire University, UK, 542
- Standard Media Exchange Framework
 (SMEF), 26
- Standards
 alternate formats, print disabilities,
 421–422
 cataloging, 310, 482–483
 dual-use libraries, 507–508, 546
 Dublin Core, 29
 electronic document exchange,
 347–352, 357
*Elements of Writing About a Literary
 Work*, 253, 265*t*
 GDFR, 4
 “Guidelines for Behavioral Per-
 formance of Reference and
 Information Service Providers”
 (RUSA), 214
 library resource sharing, 384–386
 LOM, 314*n*
 METS, 123
 MIME, 132
 MODS, 314*n*
 OAIS, 4, 11, 14*n*, 43, 45–46, 46*f*, 52,
 112, 125
 Ontario School Curriculum
 Resource, 453–454
 OPA-PMH, 153
 preservation metadata, 94, 96–97,
 115, 135
 RDF, 11
 SMEF, 26

- TIFF, 132
- URI, 74
- virtual reference, 389
- Web metadata, 308
- WSDL, 154
- Stanford University
 - LOCKSS project, 14*n*
 - National Geospatial Digital Archive, 167
- State and University Library, Aarhus, Denmark, 59–60
- State governments, 170–171
- State libraries
 - California State Library, 209–210, 213–214
 - digital preservation collaboration, 171
 - Illinois State Library, 423
 - Ontario Digital Library, 457–458
 - Oregon State Library, 417
- Static Web pages, 59
- Statistics
 - book storage, 398–399
 - children's books research, 256*t*, 257*t*
 - Electronic Information for Libraries, 375*t*
 - Electronic Theses and Dissertations Center (OhioLINK), 408*f*
 - health information searching, 610, 611, 612, 613*t*, 614*t*
 - Hellenic Academic Libraries Link, 365*t*
 - Information and Library Network, India, 475
 - National Electronic Information Consortium, Russia, 365*t*
 - National Electronic Library Program, Finland, 363*t*
 - OhioLINK project, 395–396, 403*f*, 404–405, 404*f*, 405*f*, 405*t*, 407
 - Open WorldCat project, 437*f*, 442–443, 445–446
 - public library users, 542
 - South African education, 624–625
 - Web content preservation, 83–85
- Storage area networks (SAN), 27
- Storage Resource Broker (SRB) initiative, 13, 155, 156*t*
- Storage systems
 - digital preservation system design, 146–149, 147*f*, 150–151, 152, 155–159, 157*t*
 - print books, 398–400
- Stored searches, 614–615
- Storytelling
 - Information Age Town project, 278
 - A Personal Electronic Teller of Stories (PETS), 297
- Students
 - children's books, 248
 - dual-use libraries, 527, 531, 556, 573, 577, 632
 - homework assistance, 212, 218–221, 222
 - informal learning, 233–240, 234*f*, 235*f*, 236*f*, 237*f*, 242
 - Information Age Town project, 274, 277–281
 - McGinty, Celia, 187–188
 - medical students, 596–605
 - Open WorldCat project, 432
 - print disabilities, 413, 414
 - Web portal design project, 321–323, 336
- Stufflebeam, D., 506
- Subject headings. *See* Vocabularies and taxonomies
- Submission Information Packages (SIP), 127–128
- Subscriptions
 - Big Deal consortia agreements, 401
 - Electronic Information for Libraries, 375
 - Hellenic Academic Libraries Link, 363
 - Indian consortia, 469, 474–475
- Summative evaluations, 507
- Surveys
 - heritage collection preservation, 170
 - Information Age Town project, Ireland, 270
 - National Digital Information Infrastructure and Preservation Program, 171
 - National Library of Medicine, 611, 612–614, 613*t*, 614*t*, 615*t*
 - Open WorldCat project, 433
 - PREMIS working group, 114
 - School Register of Needs Survey*, South Africa, 624–625
- Sweden
 - dual-use libraries, 540, **549–568**
 - Nordic consortia, 372
 - subject headings for children, 311
 - Swedish National Library, 62, 80

- Syracuse University School of Information Studies, 231–232
- System development and design
- children and digital resources, 176, 189, **197–208**, 203–205, 239–240, 242, 286, 292–298, 307–308, 309, 314
 - digital preservation, 4, 126*f*, 146–160, 147*f*, 151*f*
 - DSpace project, 10, 11, 13
 - dual-use libraries, 574
 - Electronic Document Exchange Network, 353–357
 - Global Digital Format Registry, 134*f*
 - Koninklijke Bibliotheek, 42–43, 44–46, 46*f*, 47*f*, 48, 48*f*, 50*f*
 - Legal and Historical Internet Archive System (BBC), 23, 25–27, 29, 31
 - National Digital Information Infrastructure and Preservation Program, 169
 - National Library of New Zealand project, 100*f*
 - Ontario School Curriculum Resource, 453–455
 - teenagers and library services, 211
 - Web portals for children, **318–342**
- Systematic Evaluation: A Self-Instructional Guide to Theory and Practice*, 506
- T
- Tamworth and Lichfield College, UK, 542
- Te Puna Mātauranga o Aotearoa. *See* National Library of New Zealand (NLNZ)
- Teaching. *See* Education and teaching
- Technical support
- Information Age Town project, 275, 283
 - Koninklijke Bibliotheek project, 49
 - Legal and Historical Internet Archive System (BBC), 27, 28
 - National Library of Australia, 64
- Technology skills
- Canadian Initiative on Digital Libraries, 459–460
 - children and digital resources, 182, 290
 - Information Age Town project, 267, 268, 272–273
 - South African community-school library, 634
- Teenagers
- dual-use libraries, 527, 589
 - information seeking, 181
 - online reference, **209–227**
- Television
- British Broadcasting Co., 17
 - Educational Broadcasting Corp., 167–168
- Terminology
- children and subject headings, 312, 313–314
 - children's resources, 305
 - librarianship, 552
 - search-generated keywords, 311–312
 - Web portal design, 331
- Texas
- users with print disabilities, 417
- Text messaging, 213
- Textbooks
- medical education, 600
 - users with print disabilities, 413
- The Library Cooperative (TLC), 449
- Thesauri. *See* Vocabularies and taxonomies
- Theses
- Electronic Theses and Dissertations Center (OhioLINK), 407, 408*f*
 - Information and Library Network, India, 475
 - Thirteen/WNET New York, 167–168
 - Thomson Web of Science, 391
- Three-dimensional graphics, 337–338
- TIFF (Tagged Image File Format), 132
- Timelines, 333
- Todd, R.J., 181
- Training
- children and Web portals, 338
 - dual-use library staff, 593–594
 - Indian consortia, 482
 - Information Age Town project, 268, 273, 274*f*
 - King Library, San Jose, CA, 543
 - National Electronic Information Consortium, Russia, 366
 - South African community-school library, 627–628, 634
 - users with print disabilities, 423
 - See also* Information literacy
- Transcripts
- Information Age Town project, 271

- virtual reference research, 214, 218–219
- Travelers, Ireland, 281, 284*n*
- Tribal community, South Africa, 621
- Trusted Digital Repository (TDR), 50–51, 107–108
- Tutor.com, 209, 213–214
- Tutoring services, 209–210, 219–220
- The 2003 OCLC Environmental Scan: Pattern Recognition* (Wilson), 382–383
- Typing skills, 296
- U
- Uniform Resource Identifiers (URI), 355
- Union catalogs
 - alternative format materials, 420–421
 - Open WorldCat project, 430, 446
 - RedLightGreen, 388–389
- United Kingdom
 - academic libraries consortia, 419
 - Ardnamurchan school, 531–532
 - Bishop's Park College library, 530
 - British Broadcasting Co., 16–31
 - Callington Library, 523
 - consortia, 367–371, 419
 - Derby library, 530
 - Disability Discrimination Act of 1995, 415
 - dual-use libraries, 485, 521–522
 - National Archive, 132
 - National Health Service Trust libraries, 596–605
 - North West Academic Libraries, 367
 - Portree library, 520
 - Revealweb, 420–421
 - Share the Vision project, 418
 - Special Educational Need and Disability Act (UK), 415
 - Worcester library and history center, 535–547
- United States Congress, 164
- United States Department of Education, Virtual Reference Desk, 231–232, 389
- Universal Virtual Computer (UVC), 36, 37*f*, 130–131, 130*f*
- Universities. *See* Academic libraries; Colleges and universities
- University Grants Commission (UGC, India), 473–475
- University of California
 - California Northern Regional Library Facility, 399–400
 - National Digital Information Infrastructure and Preservation Program, 166–167
- University of California, San Diego, 13
- University of California, Santa Barbara, 167
- University of Illinois, 169
- University of Maryland
 - National Digital Information Infrastructure and Preservation Program, 169
 - persistent digital archives, 158*f*, 159
- University of Michigan
 - ARTEMIS Digital Library, 311–312, 338
 - National Digital Information Infrastructure and Preservation Program, 169–170
- University of Pennsylvania Library, 141
- University of Winnipeg, 349, 357
- University of Worcester, 538–539, 540, 546
- Unix identifiers, 148
- Upper Riccarton library, New Zealand, 530
- URI (Uniform Resource Identifiers), 74
- URLs. *See* Web sites
- Usage patterns and reports
 - Counting Online Usage of Networked Electronic Resources, 385
 - European consortia, 378
 - health information, 610, 611, 612, 613*t*
 - Information and Library Network, India, 475
 - Legal and Historical Internet Archive System (BBC), 28
 - OhioLINK project, 395–396, 404–405, 405*f*, 405*t*, 407
 - Open WorldCat project, 437*f*, 445–446
 - public libraries, 542
 - virtual reference, 212–213
- Useful Utilities Co., 385
- User-centered design, 321

User interfaces

- Ask Jeeves for Kids, 331*f*
- children and digital resources, 203–205, 307–309, **318–342**
- Google, 438*f*
- History Trek portal, 325*f*, 334*f*
- International Children's Digital Library, 250*f*
- KidsClick interface, 329*f*
- Lycos Zone, 328*f*
- National Electronic Library Interface, 362
- National Library of Medicine, 616*f*
- Ontario School Curriculum Resource, 454–455
- Open WorldCat project, 437–438, 440*f*, 441*f*, 442*f*, 443*f*
- Yahooligans!, 330*f*

User needs

- children, 189, 223, 241–242, 288, 303
- digital preservation selection, 61
- dual-use libraries, 508–509, 525–526, 624
- health libraries, 597, 599–600, 607, 611–612, 613–614, 614*t*, 615*t*
- users with print disabilities, 413, 422–423

User permissions. *See* Security and permissions

Users First: Removing Barriers to Knowledge Access Across HE and the NHS (report), 602

V

Vandergrift, K. E., 247

Vendors

- book vendors, 435
- OPACs, 308

Version control, 12

Video, 321, 407

ViewPoints Project (Ohio), 407

Virginia

- Blacksburg Electronic Village, 268, 274

Virtual Information Centre (VIC, India), 476

Virtual reference. *See* Reference services

Virtual Reference Desk (VRD)

Learning Center, 231–232, 389

Visby, Sweden, 554–556, 557, 564

Visuals. *See* Images and visual content

Vocabularies and taxonomies

- children and digital environments, 291, 306–307, 310–312, 313
- MeSH (Medical Subject Headings), 616
- question taxonomies, 232–233
- Web portal design, 332–333
- Volunteerism, 275, 626

W

Walter, V. A., 210

Waters, Donald, 91–92, 108

Watson, J.S., 200

Web browsers, 153, 154

Web portals and search engines

- Canadian Initiative on Digital Libraries, 459
- for children, 176, **318–342**
- college student use, 432
- digitization projects, 387–388
- health information, 604
- Hellenic Academic Libraries Link, 364
- National Electronic Library Program, Finland, 362
- National Library of Medicine, 610–617, 616*f*
- Open WorldCat project, 431, 433, 435–436, 438*f*, 447
- RedLightGreen union catalog, 388–389
- Yahooligans!, 200–203

Web Services Description Language (WSDL), 154, 353

Web sites

- bbc.co.uk, 16
- British Broadcasting Co., 16–31
- children's use of, 319
- commercial databases, 314*n*
- digital archiving initiatives, 53*n*
- digital preservation, 2–3, **72–90**, 77*f*, 78*f*, 79*f*, 83*t*, 93, 161*n*
- Information Age Town project, Ireland, 279
- International Children's Digital Library, 250*f*
- Legal and Historical Internet Archive System (BBC), 25, 28
- library consortia, 381
- MedlinePlus.gov, 611–617, 613*t*, 614*t*, 615*t*, 616*f*

- National Digital Information
Infrastructure and Preservation
Program, 172*n*
- Ontario School Curriculum
Resource, 454–455
- Open WorldCat project, 436–437
- PREMIS working group, 113
- Tutor.com, 209, 213–214
- Virtual Reference Desk Learning
Center, 231–232
whole domain preservation, 61–62
- West St. Petersburg Community
Library, FL, 581–594
- Westminster, CO, **569–580**
- WGBH Boston, 168
- Wireless Information System for
Emergency Responders
(WISER), 616
- WNET New York, 167–168
- Worcester library and history center,
UK, 535–547
- Workshops. *See* Meetings and work-
shops
- World Wide Web. *See* Internet and
World Wide Web
- WorldCat Partner Program, 446
- Writers
Gray, John, 209
- Writing skills
Information Age Town project, 278
teaching of, 184
- Written Archives Centre, British
Broadcasting Co. (BBC), 17
- X
- XML
Electronic Document Exchange
Network, 353
National Library of New Zealand
project, 95, 99
resource sharing innovation, 386
- XSL style sheets, 95, 99
- Y
- Yahoo!
Open WorldCat project, 435–436,
437
Yahooligans!, 200–203, 320, 322,
330*f*
- Young adult collections
dual-use libraries, 515, 589
young adult librarians, 210, 221
- Z
- Z39.50 standard, 384

