

Management and the management of information, knowledge-based and library services 2001

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Keywords

Literature, Information services, Management, Libraries

Abstract

Reviews the general literature of management relevant to the information and library profession, and that of the management of information and library services, published in 2001. Themes emerging at major conferences are noted. Issues of growing concern are identified together with those that appear to be becoming of lesser interest.

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Introduction

This is the fifth in a series of annual papers that track developments in the field of general management, and in the management of information and library services (Layzell Ward, 2000). The review is based on published sources, in print or electronic format, available in the UK at the end of December 2001. It cannot be comprehensive given the volume of publication. The selection is based on scanning reviews, abstracts and recent issues of journals, and browsing in specialist bookshops. Browsing is particularly important given the time lag between publication of a monograph and the publication of critical reviews.

Regretfully, coverage is generally limited to publication in the English language. Foreign language titles are generally not available in the UK, and are still poorly covered in English language indexing and abstracting services.

Within each section references to the literature of management in general precede those drawn from the information and library sectors.

Conferences

IFLA held its annual conference in Boston, USA, in August 2001 and a number of papers related to the management of ILS. Many are available at IFLA's Web site, www.ifla.org.

Singapore is noted for the rapid pace of development in its information and library services. In April 2001 it hosted the first e-tlas conference with the theme "Emerging trends in library and archival services in Singapore". In addition to papers presented by Singaporeans, there were contributions from Australia and Norway. Topics covered include transformation, organisational re-invention, agenda for change, professional development, building management and maintenance and preservation (e-tlas 2001, 2001).

The American Library Association selected San Francisco for its annual conference. Among the many topics for papers were social capital, barriers to information access, libraries and literacy, the virtual library and digital rights management. An overview appears in *American Libraries* (2001a) and Dorman (2001) reviews the exhibits.



The 2000 LAMA National Institute explored five topics: infrastructure, information communities, marketing, the library of the future, and organisational effectiveness. Bluh (2001) describes the event in an article which precedes the papers.

The Library Association held UmbrelA6, in Manchester, in June 2001. There were plenary sessions focusing on areas of current interest including social inclusion, and the future direction of Resource. Meetings were organised by sections and covered a wide range of issues. An overview is provided by Hyams and colleagues (Hyams, 2001).

The Library and Information Statistics Unit at Loughborough University organised a conference that focused on managing for value and performance and the processes involved in developing library plans. A number of public librarians presented their approach and experience in managing within best value contexts (Davies *et al.*, 2001).

An overview of the present state of CPD in many countries emerges from papers presented at the Fourth World Conference on Continuing Professional Education for the Library and Information Science Professions organised by IFLA's Round Table on CPD (Woolls and Sheldon, 2001).

Among the papers presented at the Ninth Off-Campus Library Services Conference, held in Portland, Oregon, in April 2000, is one by Hufford (2001) who relates experience gained on Texas Tech University's Distance Learning Council in the provision of support services and the need for strong support from the library. At the same conference Lowe and Rumery (2001) discussed questions relating to the planning for e-reserves and copyright.

The 25th Online Conference was held in London, in December 2001, and despite the problems relating to international travel, there was still a good audience. The proceedings indicate that the areas of interest have shifted from a focus on scientific and technical information in the early days, to intranets, the Internet, e-learning and legal and business information (Graham, 2001).

Background

Putman's (2001) *Bowling Alone* considers US society today and draws attention to changing behaviour in American society – the way in which people have become disconnected from

one another, and how social structures have disintegrated. He examines trends, why it has happened, the effect and what is to be done. His thesis has echoes in other countries and has implications for libraries in the education and public sectors.

Comparative information concerning current practices and trends in 20 top business school libraries in the USA reviews expenditure, commercial databases provided, user education, and reference services (Abels and Magi, 2001). Despite extensive variation in their organisational structure and sources of funding, these libraries provide services and resources that are similar in many ways, and the paper will have interest outside the USA.

Peters and Howard (2001) of Emerald (formerly MCB), comment on the quality of management research, arguing that it is a pseudo-scientific body of knowledge lacking utility and value compounded by not having a clear definition of what qualifies as excellence or quality research. They consider that it should favour ideographic and ethnographic approaches.

A citation study has mapped the scholarly development of strategic management, and Martinsons *et al.* (2001) suggest that it is in a rare and potentially advantageous position of being at the interface of applied and academic research. However, even as an established sub-discipline, it would benefit from additional reflection and self-evaluation. The authors suggest that the method can be applied to other areas of scholarship that are struggling with meta-issues such as "where have we come from, where are we now, and where do we go from here?"

National associations

The American Library Association's (2001a) planning document *ALAction 2005*, encapsulates issues that are of common concern today. Their key action areas are diversity, education and continuous learning, equity of access, intellectual freedom and twenty-first century literacy. The terms used to describe the concepts may vary between one country and another, but commonly feature in national and local planning documents and the literature.

In the UK the members of the Institute of Information Scientists and the Library Association have agreed to the unification of

the two bodies to form the Chartered Institute of Library and Information Professionals (Cilip), which will come into being from April 2002 (*Library Association Record*, 2001).

One of the roles being adopted by national associations is that of mentoring, particularly of new entrants to the profession. This has been pioneered by the Australian Library and Information Association and an evaluation of the work of its South Australian branch using grounded theory reports that the group was very effective in providing social support, career development and a sense of professional identity (Jackson-Bowers *et al.*, 2001).

For new managers

Drucker's writing has stood the test of time from the publication of his first title in 1954 – *The Practice of Management*. ILS managers who are getting long in the tooth will probably have well-thumbed paperback copies on the own bookshelves, but "Gen X" will not have been brought up with the benefit of his wisdom. A selection of his writings has been brought together in *The Essential Drucker* (Drucker, 2001) which is divided into three parts: management, the individual, and society.

Some "cribs" or very quick learning tools. *The 10-Day MBA* (Silbiger, 2001) provides brief guides to the key concepts and tools that might form part of an MBA course. Good for those whose understanding of quantitative analysis and economics might be shaky. There is a series of small – circa 94 pages and pocket sized – texts on fast thinking published by Pearson. They provide "clever tips and vital information", and typical is Jay's (2001) *Fast Thinking: Flying Start*, which provides guidance on having first day confidence, knowing the right people, and setting off with style. Templar (2001) has written *Fast Thinking: Budget* with advice on gathering good information, forecasting effectively, and delivering your numbers. Very useful for new managers.

Good advice is offered to new managers by Todaro (2001) who provides a checklist recognising that new managers often have a short honeymoon.

Honing communication skills is vital and an introduction to the use of face reading will be of value in chairing and participating in

meetings that can be made more productive (Fulfer, 2001). Want to improve your presentations? Then take the advice of Morgan (2001a) and connect kinesthetically. A kinesthetic speaker feeds the primal hunger of an audience to experience a presentation on a physical, in addition to an intellectual, level. It requires an awareness of physical presence – gestures, posture movement and effective use of the space in which they are presenting. (Someone who has mastered this art is former President Clinton, judging by his recent UK lecture tour.) Weeks (2001) provides examples of emotionally charged conversations in the workplace and suggests ways in which managers can unilaterally improve the way they cope with them. Three situations are described: delivering bad news, a conversation that escalates because of a lack of understanding, and aggressively stressful conversations where someone makes use of psychological and rhetorical mechanisms to throw their counterpart off balance or undermine them. Practical guidance is provided on how to handle the situations. Baldwin (2001) questions the wisdom of avoiding assigning blame when something goes wrong and identifies five rules of blame: know when to blame and when not to, blame in private and praise in public, be aware that the absence of blame can be worse than its presence, manage misguided blame, and be aware that confidence is the first casualty of blame.

One of the areas that are often not included in qualifying courses is that of the economics of information. A second edition of Kingma's (2001) *The Economics of Information: a Guide to Economic and Cost-benefit Analysis for Information Professionals* contains two new chapters. One covers the costs and benefits of digital information. The second focuses on network economics and includes a provocative analysis of scholarly journal pricing in the networked digital environment. A copy should be in every staff library as it contains worked examples and is a painless way of getting to grips with a field of increasing importance.

Do you have ambitions for the future? Perhaps the liveliest sessions at UmbrelLA 6, the biennial meeting of the UK information and library sector, was the series of papers on the seven deadly sins, or, how to be a chief librarian (Bennett *et al.*, 2001). Each chief took one of the sins as a theme on which to

hinge a talk about the skills and attributes needed by anyone wanting to become a chief.

Leadership

Leadership is an area of concern in both the general field of management and within the profession. *Elizabeth 1 CEO: Strategic Lessons From the Leader Who Built an Empire* (Axelrod, 2000) was reviewed by Tyree and Hansen (2001) who indicated its readability and relevance across the information and library sector. There is much in her aggressive leadership style and political acumen that can be applied today.

A themed issue of the *Harvard Business Review* provides a self-help guide to leadership, and the first feature discusses primal leadership and how emotional intelligence improves results. Goleman *et al.* (2001) indicate that new research shows that a leader's mood plays a key role: a cranky and ruthless boss creates a toxic organisation, while an upbeat and inspirational leader motivates people to tackle any challenge. They provide a five-step process to help managers learn how their emotional leadership drives the moods and actions of colleagues – and how to adjust behaviour.

Collins (2001) describes different levels of leadership. Those at the lower levels are highly capable individuals, contributing team members, competent managers and effective leaders. But at the highest level – 5 – they build enduring greatness not necessarily by having a larger-than-life personality, but by a combination of personal humility and professional will. The need to build leaders at every level is stressed by Drotter and Charan (2001) who argue that when a CEO's tenure is short and departures frequently happen, external recruitment is not a panacea. They argue that leaders should be developed internally to maintain a pipeline of skilled and prepared leaders within the organisation.

The role of leaders during mergers and acquisitions forms a model developed by Thach and Nyman (2001) who argue that the pre-combination phase is the most challenging for leaders. The skills needed at this stage relate to emotional acknowledgement, communication, work and customer focus, motivation and incentives, creativity and involvement.

Reichheld (2001) has derived six principles that originate at the top of companies and that engender the greatest loyalty among customers, suppliers and stakeholders. They are: practise what you preach, play win-win, be selective in your choice of employees and customers only accepting those with whom a long-term relationship is possible, keep it simple, reward the right results, listen hard and talk straight.

The single greatest cause of an organisation underperforming is that of indecision. Charan (2001) lists actions that a leader can take to break a culture of indecision. They should engender intellectual honesty, ensure that meetings, reviews etc. have honest dialogue at their core, and make sure that feedback and follow-through are used to reward high achievers, coach those who are struggling, and discourage those who are blocking progress.

Sebenius (2001) draws on some 50 years experience and analysis of negotiation and describes six common mistakes. They are: neglecting your counterpart's problem, letting price bulldoze other interests, letting positions drive out interests, searching too hard for common ground, neglecting no-deal alternatives, and failing to correct for skewed vision.

Persuasion is one of the leader's essential tools and Cialdini (2001) describes principles that can be learned and applied. The first is that people are more likely to follow someone who is similar to them, than someone who is not – so enlist other people to help you make a case. Second, people are more willing to co-operate with people who like them – so identify real similarities and offer sincere praise. Third, people will treat you the way you treat them. Fourth, people keep promises they make voluntarily and explicitly – get commitments in writing. Fifth, people defer to experts, so demonstrate expertise and don't assume it is self-evident. Finally, people want a commodity if it is scarce – exclusive information is more persuasive than widely available data.

Academic librarians in the USA have advocated the approach of servant leadership and Russell (2001a) provides an overview of its theory identifying the values that underpin it and its characteristics. The core values are humility, respect for others, honesty, integrity and trust.

Organisational culture

Claver *et al.* (2001) analyse the improvements in organisational behaviour needed to maximise the efficiency of information systems. They write of the mutual relationships among information technologies, information systems and organisational culture. Their paper focuses on the way in which organisational culture influences this process, providing an interesting paper on a topic that has not received much attention to date in the ILS sector.

Kemp and Dwyer (2001), in studying the organisational culture of a large hotel in Australia, surveyed the literature on organisational culture focusing on six types of artefact that form an organisation's cultural web – routines and rituals, stories, symbols, power structure, organisational structure and control systems. They found the hotel to be very culturally driven with its culture permeating every aspect of its operations, and this contributes much to its success.

Few studies have yet emerged of the effect of the corporate culture on strategic planning in libraries, but Badu (2001) provides a case study from Ghana; and Odi (2001) writes of the influence of traditional culture on library administration in Nigeria.

Planning

Roadmapping is a term taken from strategic planning, technology forecasting and other futures-based disciplines which addresses some aspect of a planning problem (Kappel, 2001). This process, which is described in a report of a critical evaluation using ten in-depth case studies, can challenge many standard assumptions present in other planning documents.

Given the volatility in the corporate sector, managers of special libraries and information services could consider the approach of companies operating in rapidly changing, ambiguous markets. Rather than adopt strategies based on identifying a defensible position in an attractive market leveraging resources to deliver a vision, those in a fast changing environment should identify key processes and adopt simple, easily understood rules that allow them to pursue opportunities. Eisenhardt and Sull (2001) offer five kinds of

rules: "how-to" rules, boundary rules, priority rules, timing rules and exit rules. These rules can create a strategic frame in which managers can operate.

A guide to Internet sources about data that will help to apply standard measurements to resources and services, allocate expenditure, decide whether particular activities are cost effective, how far the library meets user needs, and plan for the future is reviewed by Maxymuk (2001).

Randolph (2001) recommends the use of the search conference as being a participatory and democratic form of strategic planning well suited to libraries being transformed in the post-industrial age. The process and its implementation are described, which facilitates adaptive learning. The experience of using focus groups as an effective tool for programme planning, needs assessment and decision making with hospital libraries in California is discussed by Glitz *et al.* (2001) who argue that it can be applied in all types of libraries. Hannabuss (2001a) describes the use of scenarios as part of the strategic planning process and as a way of forecasting which core competencies an organisation needs to develop for survival and competitive advantage.

Crawford (2001) applies the Pareto Principle to argue that to achieve genuine excellence libraries must cater to the minority.

Galluzzi (2001) argues that the user centres approach to library services is not yet reflected in the planning of resources and services in Italy, and indicates that community analysis should be introduced.

The British Library conducted a public consultation as part of its strategic planning process under the leadership of its new director, who outlines the challenges that it faces and its role in the new century (Brindley, 2001).

Colleagues in the USA have been producing excellent practical guides to planning public library services for many years and Nelson (2001) has compiled the latest version – *The New Planning for Results*. Designed for use in the USA, it has value in other countries where it could be modified to meet local conditions. It sets down the process and organises it into a series of tasks. Each chapter has a set of milestones which indicate what will have been learned by the end of each chapter, and it contains workforms.

Aarhus City Libraries carried out a development programme in 2000 which resulted in a vision for the library, a statement of values and reorganisation. It already offered internal contracting, provided several Internet based services and was a centre of excellence for staff distance learning. The process involved maximum staff participation. The further development of Internet services was seen as being important, together with a Digital Library Department and a Centre for Payment Services (Hapel, 2001). Recent legislation in Belgium authorises local councils to set up consultative groups to involve the public in library services. A number of public libraries comment on the usefulness of the groups (Hoflack, 2001).

Writing for the US market, but of value to librarians in other countries, McCook (2000) urges librarians to get involved in building communities by ensuring that they participate in the planning process. She discusses the need for community building and the ways in which librarians should get involved. Case studies are included and it is a good example of the type of inspirational text that our American colleagues produce.

Planning for the hybrid library

The history of practice-based library and information research in the UK is reviewed by Brophy (2001) who demonstrates that the recent eLib programme on practitioner involvement and leadership had its roots in R&D carried out 30 or more years ago. This forms a lead paper in an issue of *Library Management* that considers managerial aspects of the hybrid library. Other papers discuss: the integration of local resources, extending it to franchised students; networked access at small or remote sites, staff and end user training, a costing model, scalability and sustainability, marketing and evaluation (Cornford, 2001a, b; Livesey and Wynne, 2001; Mackay, 2001; Garrod, 2001; Hutton and West, 2001; Jackson, 2001a, b).

The Agora Project was one of a number of UK hybrid library projects and Palmer and Robinson (2001) summarise case studies of issues surrounding the integration of traditional and digital libraries.

A major eLib project commenced in 1995 named Focused Investigation of Document

Delivery Options (FIDDO). It investigated the issues that relate to full-text document access for academic researchers, and focused as much on the user as on document access. A monograph reports the research. It includes a review of the international literature, definitions, models, findings derived from the use of quantitative and qualitative methods, the implications outside academic research, and the document access R&D agenda. It is a thorough introduction to the issues and provides managers with a readable overview (Jacobs *et al.*, 2000).

The future of academic libraries is reviewed by Akeroyd (2001a) who draws on a generic model to describe the components of all library systems. He considers that collections will continue to exist but be described in different ways, and physical collections will mutate into multi-functional places. Knowledge management will become increasingly important and the shift will be towards a service and support role.

The need to maintain the mission of the library in the development of the hybrid library is explored by Von Elm and Trump (2001) who discuss a range of issues including connectivity, library staff collaboration, reference and instruction and communicating with library users.

Library statistics

An issue of *IFLA Journal*, edited by Sumsion (2001a, b), contains a series of papers on library statistics by noted international specialists. Statistics seems to be vanishing from ILS school curricula and *Elementary Statistics for Effective Library and Information Service Management* by Egghe and Rousseau (2001) provides a basic guide, with examples, to descriptive and inferential statistics.

Managing change

In *Shaping the Adaptive Organization* Fulmer (2000) applies principles derived from biological models, particularly complex adaptive systems, and companies in the hi-tech field which operate in a chaotic environment. Bringing the ideas together he provides a framework which encompasses landscapes (the organisational environment), learning (encouraging the sharing of

learning), and leadership (which requires non-traditional vision and skills).

Kanter (2001) always stimulates ideas and although the world of e-commerce has changed since the book was published, *Evolve! Succeeding in the Digital Culture of Tomorrow* still has some strong messages. She writes of change, indicating that the answers will not be found in cyberspace, but on the ground where real people connect, collaborate and form thriving communities.

Huy (2001) writes in praise of middle managers – a group often neglected in the literature – as a group who can assist to bring about radical change – but whose contributions may go unnoticed by senior management. Many have moved up the organisational ladder and so have extensive networks. They manage the tension between continuity and change and should not be undervalued.

In every organisation there is at least one person who does not accept change and two organisational psychologists indicate that this does not necessarily mean it happens because of rejection or opposition to change, or the result of inertia. Kegan and Lahy (2001) describe competing commitments – where a person might have a commitment to change, but have an internal conflict that may seem to be resistance, but is a form of personal immunity to change. It could be a fear of delivering on the next assignment which might be tougher, if the current one is delivered too successfully. A process for helping staff to uncover the competing commitments and begin to change behaviour is outlined.

Bringing about radical change the quiet way is described by Meyerson (2001). Managers may yearn to confront assumptions, practices or values yet if they speak out too loudly resentment can build, but if they do not speak out resentment builds within them. To overcome the problem she advocates a subtle form of grassroots leadership that she names “tempered radicals” because they can effect significant change in subtle ways. It involves incremental approaches: “disruptive self-expression” in dress, décor or behaviour; “verbal *ju-jitsu*” where an individual redirects an insensitive statement; “variable-term opportunists” – spot, create and capitalise on short and long term chances for change; and “strategic alliance building” where one individual joins with another. Tempered

radicals are masters of transforming organisations from the grassroots.

Among three case studies of change, one centres on the management school of a university, in a study of the effects of organisational change. Humphries and McHugh (2001) use Maister’s professional service firm model which separates organisations into three types each with its own competitiveness set: “brains”, “grey hair”, and “procedure”.

The issues surrounding the management of virtual organisations are impacting on ILS, particularly in the academic and corporate sectors, and research by Hughes *et al.* (2001) may have relevance. They have studied the development of a virtual team set up by a retail bank. Tensions were identified between the need to understand customers while working in a depersonalised system, and in working in a team where there is little contact. They conclude that the management issues involved in virtual teamwork are complex, revolving around how to manage the interface between the “virtual” and the “real”.

Katsirikou and Skiadas (2001) describe the impact of chaos theory in social systems and the phenomena that result from it, drawing attention to the related phenomena in the state of libraries today and change resulting from it.

Akeroyd (2001b) provides an overview of the management of change in electronic libraries. Morgan (2001b) argues that most technological change is not successful because it fails to take into account how people will react to change. In the context of university libraries he indicates that creating a climate in which change seems natural will defuse resistance, and advises on how to make staff aware of strategic decisions that need to be made and make an input to them.

Within many universities around the world the convergence and integration of libraries with computing or information technology services has taken, or is taking, place. The situation in Australia is described by Sayers (2001) who writes of open relationships, *de facto* marriages or shotgun weddings, and the implications for the delivery of reference and information services. In a *festschrift* for Tom Wilson, Moran (2001) takes up his challenge for university libraries to reshape to better meet the needs of users. She reviews the restructuring of North American university libraries commenting on the fall from

popularity of business process reengineering, with a greater emphasis being placed on modifying the organisational structure to become flatter and more flexible. She provides an overview of trends, including convergence.

Position restructuring has taken place at Peking University Library in response to changes in the university's requirements, the increasing demands and expectations of users, to reduce unwanted positions and enhance the responsibilities of selected positions (Gao and Zhang, 2001).

One of the departments in many university libraries that are undergoing change is that of cataloguing, and El-Sherbini (2001) presents a case study of change at Ohio State University. In a reorganisation of the technical services division at Pennsylvania State University Library, self-directed teams were created in the mid-1990s. In 1999 an administrative change forced an examination of their effectiveness and concerns emerged. A formal teams assessment survey was undertaken which was used to develop a structured environment in which the concerns could be addressed. A management system for performance was developed as a tool for re-engineering the teams and Bazirjian and Stanley (2001) include the forms used in the survey. In 1996 Griffith University Library, in Australia, undertook a major re-engineering of its technical services department, which resulted in a reduction from 34 to 17 staff. The new section organised into two self-managing teams, and the change was as much cultural as structural. Team members were encouraged to take responsibility for their own work areas and participate in all decision-making processes. Performance measures were put in place and unit posts and productivity measured on a quarterly basis. The methodology for calculating the figures and use as a management tool is described (Smith, 2001a).

A client-centred approach was employed by library managers in a reorganisation of the acquisitions department at Dartmouth College Library (Goude and Tusa, 2001). Library managers were assigned areas of responsibility to designated specialists. They discuss methods of including staff in the planning process and ways to reduce the stress that generally accompanies change. Written procedures and thorough documentation provide open lines of

communication and play an important part in training and ongoing success.

At North Carolina University at Chapel Hill single service desks have replaced separate service desks in the health sciences library, known as the User Services Center. This replaces the circulation desk, reference desk and curriculum support desk. Moore *et al.* (2001) review the studies undertaken to shape the User Services Center and assess the training needs required.

In the last decade major changes have taken place in the libraries of UK newspapers, and Chapman (2001) examines these in relation to technology, ownership and management of the company and the information environment in which they operate.

Changes are taking place in Danish Public Libraries following the introduction of new legislation. Funding may be provided up to 2002 for building collections of music and media, staff training and increased co-operation between the municipalities. There will be fewer county libraries with more extensive and varied tasks (Christensen, 2001). The effect of the "new public management" on local government in developed countries is discussed by Sanderson (2001), who argues that it has increased the use of performance measurement and monitoring by central government to control the outputs of local government. This has major limitations as a driver of change and improvement, but local government needs to develop ways of learning from their service evaluations. The changes in organisational culture and structures needed for this to happen are reviewed.

Managing collaboration and partnerships

The experience of business in managing cultural integration and cultural change processes is likely to be of value in the ILS sector. Bijlsma-Frankema (2001) outlines how managers can analyse the partner's organisational goals and develop the strategy and integration structures that will support a merger.

Peters (2001) refers to seminal papers by Atkinson and Frazier and identifies three "big issues" in library consortia development. They are the tendency for the information needs of communities of users to be elastic

and highly malleable depending on perceptions of accessibility, the declining need for trained experts to select content at the level of individual periodical and book titles, and the frequently expressed fear that consortial deals for electronic content collection development will make core collections more homogeneous.

Issues to be considered in collaboration between eastern and western European countries in EU-funded projects are discussed by Pors and Edwards (2001).

As a result of the British Library's Strategic Review a unit was established to develop the Library's Cooperation and Partnership Programme in the areas of collection development and management and access. Smith (2001b) describes its work and the way in which partnership and co-operative initiatives with other organisations are being developed.

In Scotland there has been cross-sectoral collaboration between the National Library of Scotland and Edinburgh University in the procurement and implementation of a new library management system – Voyager. Cannell and Guy (2001) describe the theoretical and practical advantages and disadvantages of this form of collaboration between academic and government organisations.

A survey has been carried out among US academic libraries to determine whether they had a teaching centre on campus, current joint projects between instruction librarians and the centres, who initiated them and future projects. Significant partnerships were identified (Jacobson, 2001). Gilmer (2001) describes how, in Florida, a community college and a university share the same campus but share a library. This serves two institutions having different missions; one provides the facilities, the other the management. Both provide resources and staff.

A merger of hospital library services has taken place in the Ottawa-Carleton region of Ontario. McGowan (2001) reviews the challenges and successes that arise from the integration of several libraries particularly in the fields of staffing, delivery of services and information and access to a larger collection of resources.

Reference Services Review carries a thematic issue devoted to faculty-librarian partnerships, and among the papers

Lau (2001) describes this as a new trend in Mexican libraries.

Governance and decision making

Miller (2001) presents ways to rate the performance of board/faculty committees using the seven elements of POSCERV – planning, operations, staffing, communications, evaluation, resources and vision. Large Web sites tend to be developed with the combined efforts of many people and departments, and the role of Web advisory boards can be significant. Guenther (2001) identifies five principles when creating a steering committee or governance structure: follow a plan, select a representative group, define a governance charter, define a governance process and define deliverables.

Decision making is a process fraught with power plays, politics, personal nuances and institutional history (Garvin and Roberto, 2001). Some decision-making processes are more effective than others are. Most frequently the advocacy process is employed, but it is probably the least productive method. The authors argue that the inquiry approach is more powerful where people consider a variety of options and work together to discover the best solution, and they describe strategies for moving from an advocacy to an inquiry process. Clarke and Mackaness (2001) focus on the role that intuition plays in the cognition and formation of schema by decision makers, and consider three factors that contribute to intuitive decision making – experience, understanding and a questioning outlook.

Managing buildings and space

New editions of two textbooks on library building and design have been published. A 4th edition of the *Checklist of Library Building Design Considerations*, by Sannwald (2001), helps planners, librarians and architects to evaluate current space and analyse each area as it relates to space and function in the library. It poses a formidable list of 1,500 questions and will help to avoid expensive mistakes in all types of library and information centre in any country. One of the issues facing librarians, particularly in the academic sector, is how to design libraries in

the age of the hybrid library. A second edition of *Academic Libraries as High-tech Gateways* (Bazillion and Braun, 2001) provides a narrative commentary on the planning issues which will be of value to librarians, architects, and university administrators.

Award-winning buildings selected by architects and librarians in the USA are described, together with details of size, architects and costs (Dahlgren, 2001). *Facilities Showcase 2001* provides colour photographs of new, restored and remodelled libraries in the USA (*American Libraries*, 2001).

Questions of security are now of increasing importance to managers and Bullard (2001) provides practical advice, a bibliography and considers the costs. Theft in public libraries is a growing concern and McCree (2001) identifies ways to overcome the problem, advocating the need to take a proactive approach.

With a growth in the number of mergers between law practices, often internationally, the question of multi-site one-person law libraries arises and Estes (2001) presents a director's perspective.

Disaster management

One of the aspects of disaster response and planning that has not received much attention to date has been the effect of inclement weather and of power cuts. A survey carried out in the USA examined the policies and practices of some 1,469 universities, including factors of decision making, ways of informing staff, compensation for staff, and services available (Kalyan *et al.*, 2001).

Page and Riley (2001) identify five steps in disaster recovery (prevention, preparation, response, recovery and follow through) and discuss the elements of a disaster response plan and vital decisions to be taken immediately following a disaster. They describe hands-on exercises to aid training.

Managing finances

Evans (2001) explains the complex year-round process of budgeting for newcomers to the task, exploring issues that can improve the chances of winning the budget battle.

An issue of *The Bottom Line* brings together papers reflecting international perspectives on library finance. Contributions included funding university libraries in India and eastern and southern Africa, the critical success factors impacting on the performance of New Zealand public library managers, managing the acquisitions budget, trends in the financial management of academic libraries, and outsourcing technical services (Malhan, 2001; Mutula, 2001; Best, 2001; Clayton, 2001; Roberts, 2001; Sweetland, 2001).

The potential hidden costs of implementing and maintaining information systems are identified by Barreau (2001) who recommends ways for avoiding serious consequences and budget shortfalls.

Research carried out by ingenta Institute indicates that of the 3 million document requests from UK institutions, some 450,000 are duplicated, the BLDSO is a wholesaler as well as a retailer of articles, almost as many articles were read from separates as from the library's copy of a journal, the total number of downloads worldwide is estimated to be in the hundreds of millions. It draws attention to the problem facing those outside the academic and corporate library environment who would like to have access to online services, but who are effectively barred (Brown, 2001).

The experience of UK higher education institutions in the consortium purchase of e-journals is discussed by Taylor (2001), and Russell (2001b) describes how Emerald is working with librarians to develop mutually acceptable pricing structures. Satin (2001) outlines the finer points for consideration by librarians when bargaining with online vendors and negotiating contracts and offers 15 golden rules to ensure the library gets a good deal. In order to manage Web-based resources effectively data supplied by vendors should be evaluated. Blečić *et al.* (2001) explore the type of data available from this source, and amongst other points, suggest per capita use as a comparative measure among libraries.

With pressure to extend opening hours against budget limitations, research by Weaver and Noel (2001) report a pilot study at the University of Huddersfield into security-only opening during a vacation. Quantitative and qualitative data were collected which provided a rich picture of user activity. A benchmark was established for

future opening on a custodial basis and management issues are highlighted such as health and safety.

A project sponsored by the German Research Foundation is examining the costs of services and products in some German research libraries. It has resulted in a handbook and software which describe the method which will help libraries to introduce cost analysis (Poll, 2001).

Following a reorganisation of local government in the UK, Fry and Wallis (2000) have examined its effect on the economies of scale of public library services. Many of the former co-operative initiatives no longer exist, resulting in a diminution of public access to materials and an inability to provide the former levels of specialist expertise. Increasingly UK public libraries need to bid for additional funding to develop their activities. Parker *et al.* (2001) explore the impact that this has on the development of public libraries, identify successful bidding strategies and investigate the possibility of other funding sources.

An overview of the fiscal state of US public libraries for the 2000/2001 fiscal year indicates that libraries are still faring well with many significant indicators at least slightly up from the previous year. The financial outlook remains bright with libraries being seen as investment anchors that play a proactive role in revitalising the community (St Lifer, 2001).

A special issue of the *Journal of Information Ethics* focuses on crime in cyberspace and includes an article by McKinzie (2001) which provides examples of cases where advocacy, promoted as a way of ensuring adequate funding, comes with strings attached.

UK library and information services in all sectors are using service level agreements to ensure value for money and quality of service from vendors. A service level agreement is made between two parties, which describes the essential elements of the service to be delivered by the vendor to the service. Pantry and Griffiths (2001) have prepared a second edition of their guide to service standards and how to construct an agreement.

Fund-raising is of increasing importance to all types of library and information service in the not-for-profit sector and King (2001) provides the 3Rs of Web fund-raising: raising money, recognition and reaching out. A second edition of *Becoming a Fundraiser: the*

Principles and Practice of Library Development, by Steele and Elder (2000) provides a quick and painless way to learn how to set meaningful goals, build a successful development team, develop donor profiles and prospects, communicate the library's mission, and approach major donors with confidence and specificity. This is an area in which US librarians excel and Australians have been fast learners, but it is not used to the same extent in Europe – yet.

A novel way of raising funds in public libraries that is a winner with children and the young at heart is to place a gimmick which all who enter and leave the building must pass. Pittman (2001) describes a spiral wishing well in which US\$1,500 was collected in the lobby of Champaign Public Library, Illinois. Public libraries are moving into fund-raising to raise budgets and a case study of Fairfax County Public Library in the USA demonstrates how this can be done successfully (Boese and Brannon, 2001).

A fund-raising campaign by the Bauhaus University Library received wide media coverage and was organised in conjunction with the vice-chancellor's office. The library's image was raised by using modern fund-raising methods (Simon-Ritz, 2001).

Managing diversity

A selected and annotated bibliography on affirmative action and diversity covering the period 1990-1999 has been prepared by McCray Pearson (2001).

Diversity and equal opportunities is changing from compliance or it being a "good cause" to a recognition that it is a business imperative and has become a litmus test for management's capacity to cope with the world of the future (Schneider, 2001).

The role of online services for people who are blind, and access to Australian public libraries for people with disabilities, form two projects which are described by Williamson *et al.* (2001) who conclude that partnerships between local disability groups and public libraries will benefit users.

The UK government has placed considerable emphasis on the need to combat social exclusion. A major research project has examined the context of social exclusion and the nature of the problems facing public libraries and other public institutions in

tackling disadvantage (Muddiman *et al.*, 2001). The UK government has also taken initiatives to widen participation in education and Hull (2001) reports research into the ways in which librarians can help to overcome the social barriers to access.

Labour market issues

As governments place emphasis on the market economy, so employment conditions are changing. In a number of countries, including Australia and the UK, there is a switch to limited term contracts in the public and private sectors, the ending of final-pay retirement benefits and its replacement with employees funding their retirement.

In Australia, the proportion of employees working award-free is now rising bringing more middle- and lower level workers into the type of employment arrangements that were previously primarily the province of managerial levels. The basis for wage fixing is moving to a minimum salary approach. The Australian Library and Information Association provides a national office industrial advisory service to assist members, and offers guidance on formulae for calculating hourly rates for casual and part-time work (Australian Library and Information Association, 2001).

Career patterns are changing as employees move from linear advancement up a ladder to flexible "career wings". The focus is now on employability rather than a psychological contract. Individuals have to decide where they are now, where they want to be, and how they will get there (Heritage, 2001).

With a number of universities downsizing, a paper which relates the experience of the University of California in the 1980s and 1990s may be of value. It analyses the responses of faculty employees at whom the programmes were aimed, finding no evidence that the early retirement programmes encouraged the higher paid faculty to leave, and confirming that it is difficult to forecast the number of people who will respond positively to a severance incentive programme (Pencaval, 2001).

Five strategies for part-time work are: transparency of priorities and schedules, broadcasting the business case for the arrangement, establishment of routines and rituals to protect time at home, cultivating

champions in senior management, and reminding colleagues of their presence (Corwin *et al.*, 2001).

A paper by Stybel and Peabody (2001) discusses the right way to be fired, advocating the adoption of an "assignment mentality" in which managers recognise that no job is permanent. They warn of three traps for those who have "become their job", allowed the firm to become their family, or whose confidence has been shattered by the termination. They advocate preparing for the next post by networking, raising visibility and taking on leadership roles in professional bodies. If exit signs become apparent then a good severance agreement may be gained by volunteering to be terminated.

Managing human resources

Building "social capital" is difficult in volatile times, but organisations operate better when people within it have close ties and trust one another. Prusak and Cohen (2001) indicate the value of investing in social capital.

Staffing problems are emerging. In US academic libraries the older generation of service oriented staff is retiring and new graduates are seeking the more financially rewarding posts in the corporate sector. Bayard *et al.* (2001) suggest employing interns, accepting undergraduate degrees, hiring people without degrees, recruiting from those disillusioned with the corporate sector, creating a culture of innovation, and introducing staff policies aimed at retention. In the UK, a research project funded by Resource examined staffing in public libraries and reported some very disturbing trends. The public library has received funding from the government and is now repositioned for the first time in some 20 years to be a key component in the lives of people through the development of the People's Network, but there are major problems of recruitment, and less than a third of the current chief librarians are confident they have the staff in place who are ready to succeed to senior positions. The authors call for better marketing of public library work, an improvement in the preparation for public librarianship, better induction and CPD programmes and an improvement in standards for staffing (Usherwood *et al.* 2001).

A content analysis of 220 job advertisements that appeared in *College & Research Libraries* between 1973 and 1998, demonstrates that by 1998, all academic library posts routinely included computer technologies, and instruction was an integral part of reference work. Behavioural skills, especially oral and written communication were now job requirements (Lynch and Smith, 2001).

In the USA, academic libraries are increasing the numbers of internship and residency programs to assist their recruitment of staff. Brewer and Winston (2001) describe a model for the evaluation of these programs based on a survey of library directors and program co-ordinators. The key evaluation factors are identified together with frequency, format and sources of input.

An increasing number of students are working part-time in the UK and Curtis and Lucas (2001) have investigated the extent to which both employers and students benefit from this employment relationship. This provides useful guidance for libraries employing students.

The use of volunteers in English public library services is increasing, and a set of guidelines has been prepared (Cookman and Streatfield, 2001). The organisation of Friends of Libraries groups are not new, but while local history services attract many volunteers there are few formally constituted groups in Australia. The ways in which it can be organised and benefits to be gained are described by Partridge (2001).

The pros and cons of early retirement in the USA and the tax implications are discussed by Zall (2001) who identifies some common pitfalls and how to avoid them.

A new word for your vocabulary – the millennials – aka generation Y, nexters and the Internet Gen. Zemke (2001) describes the characteristics of this generation of staff, their attitudes to work and how they should be managed, what motivates them and their attitudes to common management techniques. Augustine (2001) offers a survival guide for generation Xers, and discusses the perceptions of this group compared with those of the baby boomers and approaches to work – an interesting paper for those in both generations.

Burnout is discussed by Leiter and Maslach (2001) who argue that workers may not be responsible for experiencing burnout, but that

it may be a sign of a major organisational dysfunction. They offer a method or training package to assess employees' engagement with work and to initiate a change programme to create a working environment with alleviates burnout. In the UK an employee of a local authority has brought a successful claim against his employer for compensation for the stress-related illness brought about by his work. This is a legal landmark and may open the way for other cases and Earnshaw and Morrison (2001) discuss the implications for employers and employment regulation.

Equal opportunity

With diversity becoming a major area of human resource management in many countries a paper by Thomas (2001) is timely. He writes of the failure to achieve a racial mix at the top levels of management in the USA. His research indicates that promising white professionals tend to enter fast tracks early in their careers whilst high-potential minorities typically take off after they have reached middle management. Minorities who advance share one characteristic – a strong network of mentors and corporate sponsors. He explains the type of support needed and the challenges of mentoring across racial lines.

Hankins' (2001) *Diversity Blues: How to Shake 'Em* examines race and gender issues in the workplace. She identifies the problems noting that white men can benefit too – discusses the issues, and offers ways to change the situation. With few useful titles yet published in other countries, this title based on US experience has much to offer.

There is recent European legislation on the question of equal treatment between persons irrespective of racial and ethnic origin. Fredman (2001) draws attention to serious limitations, but seeing the duty placed on public bodies in the UK as being very positive. Kirnan *et al.* (2001) ask if the wording used in questions and response options on application forms and surveys concerning race and ethnicity may be resulting in inconsistent classifications. The variations make comparison difficult.

Progress is being made in the UK towards the founding of a diversity council within the profession and Pothen (2001) reports on the Black Contribution to Librarianship Conference. The council has brought

together the groups representing black and ethnic minority librarians and the conference reviewed the work still to be done, but also celebrated a new unity and sense of purpose.

Age discrimination has been recognised in the employment legislation of many countries, but not yet in the UK. Glover (2001) describes Halifax's approach to diversity management, particularly age diversity and the way in which it has been promoted.

The retention and advancement of women in US business organisations is considered by Mattis (2001) who reviews research which identified the roles of senior and front-line managers in retaining black women and women from ethnic minorities, presents a series of case studies and positive behaviours that managers should adopt to ensure the advancement of women. The effectiveness of formal mentoring programmes in helping women reach senior management positions is examined by Blake-Beard (2001). Research is summarised and the literature reviewed, and the aspects of mentoring that may reduce its effectiveness are identified. Mentoring is important but women should look for other forms of support such as networking and family support.

Interview research with 50 European senior women managers found that recruitment and selection barriers are compounded by the informal and formal processes within the organisations. Linehan and Scullion (2001) discuss how organisations can remove these barriers.

A large US airline has carried out research into the impact that organisational culture has on women's management styles, and whether there is a difference in management styles between men and women. The airline attempted to change its traditional style to a more caring and service-oriented image. The majority of the women and over half of the men believed that there was a difference in management styles between men and women. However it is concluded that large numbers of women in an organisation will not lead to a more feminised management style (Rutherford, 2001).

Piper and Collamer (2001) have repeated a study undertaken by Carmichael and reporting in 1992, that considered men in a feminised profession. They expected to find discord and unrest – but this was not the case

as although the men acknowledged that there were more women in the field than men, they did not consider it to be a woman's profession. The authors suggest that this may be because men still retain many of the most powerful posts in the library sector, and that men genuinely do not see the profession as being either male or female.

Work/life balance

Governments are encouraging family-friendly policies and a hypothetical case study discusses the varying attitudes to these policies in the workplace. The issues of maintaining performance while offering flexibility and achieving a solution that is perceived by all concerned to be fair and equitable is considered. Each employee needs to demonstrate that they can continue to meet customer needs and performance targets while making use of the flexibility offered by progressive work-life policies (Hayashi, 2001).

Lewis (2001) argues that the traditional male model of work still dominates the workplace and has not been touched by the advent of family-friendly policies. A case study describes how a public sector organisation has introduced flexible working arrangements that have been taken up by 57 per cent of staff including 21 per cent of male employees, challenged the "long hours" culture, and developed leave policies that take into account family needs.

Many organisations are facing the problem that some staff believe that if long hours are not being worked, then a salary is not being earned. Marriott International faced this problem and senior management put in place a programme called Management Flexibility to help managers strike a better balance between work and family life. It started with eliminating redundant meetings and inefficient procedures that kept managers late on the job. Munck (2001) describes how the fundamental way that managers thought about their work was changed.

Flexible working

With more information and library staff working from home, even part of the time, managers will need to consider health and

safety questions that can arise – isolation, lack of training, stress, guilt feeling, etc. A UK insurance company has produced a video for its homeworking staff and library managers may consider whether their parent organisation should take similar action (Heath, 2001).

Professional development and workplace learning

Smith (2000) reviews the use of action learning in a leadership development programme and the role of reflection within action learning. Three elements within an action framework – focus, will and capability – which need to be drawn together are needed to turn proposed action into learning. The ways in which action learning can be undermined are discussed by De Loo and Versteegen (2001) in relation to group processes.

Skill obsolescence is a major concern in many organisations and Standridge and Autrey (2001) describes a project undertaken by a global IT company to develop a group of processes that would empower staff to improve their knowledge, skills, abilities, attitudes and therefore their contribution to the organisation. It describes the process and discusses three key aspects of staff effectiveness: scope of responsibility, job performance and competency.

The growth of e-learning companies is described by Clarke and Hermens (2001) who identify corporate dissatisfaction as a major influence on the growth of this sector. Alternative training solutions are being developed geared to corporate interests and objectives. They highlight the contribution made by strategic alliances and corporate universities.

More professional associations are developing policies concerning professional development and following the lead set by the Australian Library and Information Association. The American Library Association has held a second congress on professional education which developed 22 outcomes and suggestions for what the profession's leaders can do to improve CPD (*American Libraries*, 2001).

Issues concerning management education for ILS in Latin American and the

Caribbean have been investigated in a joint FID/IFLA project funded by UNESCO. Amongst the findings is that more attention should be given to staff development and provision of continuing education programmes (Johnson *et al.*, 2001).

In South Africa changes in labour legislation means that it is mandatory for the employer to provide training and development. Raju (2001) examines the concept of staff training and development in this context and indicates the role that staff can play through their unions and worker organisations, in self-development (Avery *et al.*, 2001).

Arising from the work of LAMA, a third edition of *Staff Development: A Practical Guide* (Avery *et al.*, 2001) brings together a set of very practical papers to assist managers in planning staff development – assessing needs, setting training goals, budgeting, developing core competencies and planning a programme to meet local requirements.

Appraisal

Flynn (2001) points out that most appraisal processes combine two functions: discussion of goals and improving job and performance, and the delivery of a comparative performance assessment. Appraisers naturally avoid discussion with the three-quarters of their workforce who are judged to be “average” and focus on the high and the low performers. In Western cultures this can cause a loss of self-esteem and is demotivating. It is recommended that ratings should not be assigned to average performers, and that the exercise focusing on those above and below average should be separated from goal-setting, coaching and job design for the current position.

Trade unions

A study has been conducted into the involvement of academic librarians in the USA in local and national trade union activities. Garcha and Philips (2001) found that members of unions generally earned higher salaries than those who were not, and librarians viewed union membership as a

way to become more involved in decision making in their institutions.

Managing teams

Drawing on research in the field of cardiac surgery Edmondson *et al.* (2001) found that the most successful teams had leaders who actively managed the groups' learning efforts. Teams that implemented new technology most successfully were designed for learning; leaders framed the challenge so that team members were highly motivated to learn, and an environment of psychological safety fostered communication and innovation.

Managing individual performance in empowered work groups is explored by Liden *et al.* (2001) who found that managers' and groups' disciplinary decisions were similar, but that individual group members tended to treat cases much more leniently. They suggest that human resource managers should consider delegating this to the group.

The application of the concept of emotional learning, so far used by individuals to enhance their effectiveness, can be applied to make teams work better by bringing emotions to the surface and understanding how they affect the work of the group. Urch Druskat and Wolff (2001) describe a model to channel emotions effectively to provide outlets for stress.

A case study in which a divisional leader reviews the success of his team in rejuvenating and refocusing a poorly performing business is provided by Heimbouch (2001) which illustrates that transitions are inevitable and require an appropriate combination of skills to manage them.

Managing legal issues

Cornish (2001) has produced a third revised edition of his *Copyright: Interpreting the Law for Libraries, Archives and Information Service* which is an essential text for UK information professionals, and has value for those in other countries in addressing the issues that they too face. The new edition takes account of the latest legislation on databases, explaining the law in straightforward terms and answers some of the questions it is likely to provoke. The implications of new case law are included.

Australia implemented a *Digital Agenda Act* in 2001 and its impact on libraries, the needs of copyright users and rights of the creators have been discussed by Pascoe and Black (2001). They note that libraries will not necessarily be in the forefront of the digital revolution, and that opportunity for libraries to digitise works in their collections is limited.

Good practice guidelines for managing copyright clearance services in higher education have been prepared by Gadd (2001) following an investigation into the situation in UK libraries.

Data protection can be a nightmare, but Ticher (2001) has produced a small practical guide on this subject for UK information professionals.

Managing performance and quality

Libraries can learn from the way that the best businesses approach customer service, and Guaspari (2001) lists 75 questions you should think about, presenting a case for focusing everyone within the organisation upon the end customer – their issues, concerns and needs.

Chase and Dasu (2001) suggest that behavioural science techniques can help to improve customer service perception. Service encounters should have a strong finish or stylistic flourish to make them memorable, bad experiences should be scheduled early so that recollection is of an improving situation, increased choice will improve the customer's perception of control over the experience as will observing established rituals. They warn that omitting rituals, however small or irrelevant, will be noticed and may be blamed for the experience.

Calvert (2000) has analysed research and practice in assessing service quality in libraries around the world, placing emphasis on users and their expectations. He reviews the methodologies available for assessing performance against user-driven criteria.

Koontz and Rockwood (2001) indicate that measures of a library's productivity assess whether the service is achieving its goals and objectives, and illustrate the concept of placing performance measures within a marketing frame of reference that builds on the main goal of satisfying user needs. They provide an example illustrating a marketing strategy based on performance measures.

A series of development projects has been testing the use of LibQUAL+ in a number of academic libraries in the USA. Based on the work of Zeithaml *et al.*'s LibQUAL+ emerged as part of the Association of Research Libraries New Measures initiative. A symposium reported work in progress in the USA and projects in the field of service quality from other countries, including the balanced scorecard being tested in Germany. An issue of *Library Trends* provides a state-of-the-art review, including a description of the methods used and their outcomes, and points to the possibility of developing international methods (Kyrillidou and Heath, 2001).

SERVQUAL was also used as the basis of a service quality survey in four large Australian universities which measured client perceptions of the service expectations of more than 40 items (Trahn *et al.*, 2001). The Australian Government funded a project "Best Practice for Australian University Libraries" which also refers to best practice activities in selected overseas countries, and members of the investigating team reflect on the outcomes (Pitman *et al.*, 2001). A report and handbook is available through links from CAUL's Web site: <http://www.caul.edu.au/caul-doc/publications.html> Assessment of Customer Service in Academic Health Care Libraries (ACSAHL) based on SERVQUAL is described by Crossno *et al.* (2001).

Pors (2001a) suggests the use of SERVQUAL to gather more reliable data from customer surveys, indicating that there is a need for a better understanding of statistics by the profession.

One of the difficult areas of evaluation has been that of reference services. Dilevko (2000) describes a Canadian project that examined the performance of the government documents reference service using unobtrusive methods. The point is raised for the need to consider certification and re-certification of reference librarians if they do not take responsibility themselves for improving their own skills. Another problem area for public libraries has been that of measuring the performance of online and network based resources. A team of experts has come together to produce a practical handbook to the process which contains examples, charts, graphs, worksheets and forms (Bertot *et al.*, 2001).

Revised guidelines for the development of public libraries have been prepared by an

IFLA/UNESCO Working Group (Gill, 2001). In the UK standards and assessment have been issued for English public libraries (Department of Culture, Media and Sport, 2001).

In the UK the concept of best value has been introduced into public library services, and Train and Elkin (2001) indicate that the problem of measuring the quality of service provision could be overcome by reader development programmes. They provide examples to measure the impact on staff and users.

An approach to benchmarking for school library services in the UK based on the national collection of data is described by Creaser (2001) who discusses issues concerning the setting of objective standards.

Markless and Streatfield (2001) trace recent changes in ideas about the evaluation of performance in UK education and libraries, examining differences in impact assessment between the two fields. A process model for generating outcome/impact indicators and targets has been developed and issues in working with the model are discussed.

Quality Function Deployment (QFD) has been applied to a study of the provision of technical library and information library services in Hong Kong. Chin *et al.* (2001) describe this practical means to help identify customer satisfaction criteria and integrate improvement strategies and plans into decision making.

Line (2001) discusses performance measurement and national libraries, indicating that for a number of reasons the figures published in the past have tended to be unreliable and sometimes dangerous. As a result national libraries have resisted their use as indicators of overall performance. On balance he considers the arguments in favour of their use are stronger than those against.

At Texas A & M University a questionnaire survey has been undertaken of participants in chat sessions of its academic virtual community to evaluate the effectiveness of the quality of the project Web site (Harrington and Li, 2001).

At Western Kentucky University Library a comparison has been made of Web-based and paper and pencil library satisfaction survey results, and Perkins and Yuan (2001) compare the findings of the two samples and indicate that further research is indicated.

A preliminary study of the benchmarking of users' perceptions of reference desk services in academic health science libraries which used a standard questionnaire is reported by Robbins and Daniels (2001). While the findings could not be used to improve services at any single library, the findings could be useful in planning future benchmarking.

Groningen Public Library is the only library of its type in The Netherlands to implement an integrated system of quality control to monitor services. It was introduced in 1993 and is based on the recursive process management methodology developed by an industrial consultant (Lechner, 2001).

Hildreth (2001) reports an experimental study into the reasons for users' inflated assessments of on-line catalogue search performance. He found that there was a strong positive correlation between the perceptions of system ease of use and assessments of search results.

While TQM may be falling out of favour Kruger (2001) provides a helpful overview of the five main schools of thought, and criticises some aspects that they missed or under-emphasised such as the contribution the individual employee can make. A comparison between Anglo-American and Chinese cultures, and the influence of the latter on Chinese management practices, is discussed in a Chinese case study of TQM (Pun, 2001).

Managing technology

After it was reported that the UK Government had wasted more than £1 billion in high profile IT failures, Boyd's (2001) five maxims of project satisfaction for software development are timely. They are: deliver the products that the customer desires or needs, delivery quality consistent with price, deliver the project in a timeframe the customer desires or needs, deliver the desired degree of feedback that the customer desires, have a system of conflict resolution that is fair to both the customer and the development team. Good questions for the customer to pose to the software house.

Kenney and Reiger (2000) are editors of a volume that explains digital imaging and provides basic information and advice linked to case studies. It is an excellent practical introduction to the subject which may not have been studied in depth by many

managers, and although targeted at academic librarians, will be of interest to those in other sectors.

OCLC has increasing influence worldwide on technology matters concerning libraries. Bellinger (2001) reviews its work on delivering the technology promise of digital and preservation resources, which is followed by other papers on the same theme. One of the most ambitious projects undertaken is CORC – the OCLC Cooperative Online Resource – and Houk (2001) provides a description leading a series of papers on this new venture. The forerunner of CORC – WorldCat, now 30 years old – is reviewed by Barton (2001) and others review its history and achievements.

The School of Computer Engineering at Nanyang Technological University in Singapore has developed a prototype digital work environment. It provides links to various information resources according to the needs of users, as well as personal workspace to record and store publications frequently used, favourite hyperlinks and references or notes (Meyappan *et al.* 2001).

Raward (2001) has developed a checklist of design principles for academic library Web sites.

Recent developments in digital journals are reviewed by Halliday and Oppenheim (2001a). They identify the key stakeholders as authors, publishers, librarians and end users and explore their concerns about digital journal production and the delivery chain. In another paper Halliday and Oppenheim (2001b) explore the economic aspects of a national electronic reserve service, concluding that the service is extremely expensive for a library when compared to an equivalent print service, and that the publishers would have a smaller income. They conclude that such a service would be inefficient.

Legal deposit and the preservation of digital publications is the subject of a research paper by Muir (2001) who indicates that most activity is of a technical nature, and that not all management issues or users' needs are being addressed.

Birch and Young (2001) describe a project at Leeds University that investigated the feasibility of offering user-initiated unmediated requesting and delivery of documents as an alternative to traditional periodicals holdings and conventional interlibrary loan. Following quantitative and

qualitative evaluation the project moved into a trial service.

In Denmark there has been a heated debate concerning filters in public libraries and Pors (2001b) reports a small-scale study into filters and the use and misuse of Internet access.

A special issue of *Australian Academic and Research Libraries* focused on aspects of flexible delivery. Papers covered: situating the library in a webbed world, flexible learning . . . does it make a difference, information literacy, equity and the use of IT, the library as an active partner in online learning and teaching, integrating library services into the eLearning environment, and a course materials database (McPherson, 2001; Bridgland and Blanchard, 2001; Orr and Wallin, 2001; Barraket and Scott, 2001; McCarthy, 2001; Young and Stokker, 2001).

The University Library at Illinois University at Urbana-Champaign has developed an electronic reserves software system. Laskowski and Ward (2001) review the project and discuss issues including copyright and the digitisation process.

Usability testing of an academic Web site is discussed in a case study involving Buffalo University Libraries. Battleson *et al.* (2001) indicate that it is an invaluable tool for testing the effectiveness of academic library Web sites.

One field of practice that is undergoing rapid change as a result of online services is that of health care; Hernando and Mackay (2001), two UK health care information managers, travelled to Australia and the USA and report on trends in their sector.

Gardner (2001) writing in a special issue of *Library High Tech* devoted to XML describes information architecture planning with XML.

The potential uses of personal digital assistants for research and library management tools are discussed by Hattery (2001) who provides examples in medical, academic and pharmaceutical libraries.

Videoconferencing facilities are becoming more widely available and the costs reduction, particularly on travel, make it an alternative to meetings for multi-site organisations; choice and use of equipment and the training that is required are discussed (Panteli and Dawson, 2001).

The procurement of a library management system is a major investment, but one that does not happen so frequently as to enable librarians to build in their experience. The

procurement process also poses problems for suppliers who have to respond to specifications that vary in content, format and quality. Fisher *et al.* (2001) report the HARMONISE project which set out to develop a model system specification.

The role of managers of library services in providing information, demonstrations and training about the Internet is discussed by Klobas and Clyde (2001) who write about the social influences on Internet use following longitudinal research with Internet trainees in Iceland.

Peterson (2001) describes a shared digital library of Native American images developed at Montana State University as a collaborative project. It now carries over 1,500 images and the site contains detailed project information including the software and hardware used.

User privacy is becoming more important in the digital library environment and Sturges *et al.* (2001) draw attention to matters of concern reviewing research. They consider how technology could compromise the confidentiality of library user data.

Kovacich (2001) proposes the merger of the roles of corporate security officer and information systems security officer to create a corporate information assurance officer, describing goals and objectives and duties and responsibilities.

Pedley (2001) draws attention to the invisible Web, said to be 500 times larger than the part that the search engines do not index. Good for getting to the parts that they do not reach.

Marketing and public relations

Relationship marketing is a term appearing in the ILS literature and McKim and Hughes (2001) writing in the management literature indicate how customer relationship marketing can be managed successfully. Some of the techniques used in retailing and selling goods may provoke thoughts for ways for information and library services to get closer to an understanding of the way in which users select and use services to bring this into the real lives of users and deepen loyalty. Seybold (2001) discusses the use of customer scenarios indicating that there is a need to think beyond processes and objectives.

Related to this is the question of brand loyalty at a time when services meet competition.

Knox and Walker (2001) explore ways of measuring brand loyalty, discussing philosophical and definitional issues before deriving a framework for understanding brand loyalty.

A new tool in market research is the split-questionnaire (Vriens *et al.*, 2001). They examine the strengths and weaknesses of questionnaires, and describe the split questionnaire that breaks a full questionnaire into sub-components and assigns them randomly across the sample of respondents. They indicate when it can be used and consider it has advantages of speed and cost.

In 2000 the American Library Association announced a campaign for libraries adopting the slogan @your library. A campaign structure has been developed which includes two primary components:

- (1) a national umbrella campaign; and
- (2) four complementary "mini" campaigns for public, school, academic and special libraries (American Library Association, 2001b).

Discussions are taking place about the use of the logo in other countries.

Morton (2001) identifies the elements of a successful campaign and describes how the Gutenberg Millennium Exhibition was brought from Mainz, Germany to the Louisville Free Library in the USA. Just in case your library has to receive high level dignitaries Ameet (2001) relates her experience including how to keep sniffer dogs happy. PIGS stands for "Partners in a great system: library advocacy through partnerships" and Bersche (2001) describes a public relations campaign in 300 Illinois libraries that would have cost more than US\$110,000 to buy the newspaper coverage generated.

Marshall (2001) argues that public relations in US academic libraries has gone unrecognised, and in interviews with library directors found that while most understood its importance, many did not have an active PR programme.

An issue of *Information Resources Management Journal* is devoted to Internet marketing research. Ranchhod *et al.* (2001) argue that academic researchers and marketers still face problems in understanding the effective use of the Internet.

Dworkin (2001) offers eight unconventional suggestions and stratagems that can be used to market information services in the corporate sector based on experience gained at the Hewlett-Packard Laboratories Research Library.

Sumsion (2001b) introduces a thematic issue of *IFLA Journal* devoted to the theme "Library statistics to enjoy: measuring success!" His paper describes how a new generation of innovative library statistics concentrates on marketing features and on assessing the impact of services on users. Examples of their use in public libraries are given, but the principles and practices can be applied in other sectors. He argues that library statistics can be a powerful aid to marketing by describing the services available, assessing market penetration and popularity, and in providing feedback on marketing initiatives and policies.

In an issue of *Reference Libraries* focusing on some of the perennial issues in reference librarianship, Cruikshank and Nowak (2001) describes the Outreach program at Mississippi State University Libraries and the framework it provides for developing and marketing reference services and resources.

Information literacy

In the past five years there has been a growth of interest in information literacy, and critical reports of development activities are now emerging. The libraries of the University of Melbourne and the Queensland University of Technology took implemented innovative approaches to co-ordinating information literacy and Salisbury and Peacock (2001) describe the operational models adopted. They analyse the success or otherwise of each model including the managerial strategies, staffing and resourcing issues.

A special issue of *Australian Academic & Research Libraries* is devoted to information literacy. Papers cover information literacy standards, teaching skills for teaching librarians, the development of the information literate students, library and academic collaboration (Council of Australian University Librarians, 2001; Peacock, 2001; Nimon, 2001; Williamson, 2001).

Knowledge management

The problems encountered by senior IT staff in UK companies who are failing to manage the increasing amounts of information available to them are identified in Autonomy Corporation's study carried out in 1999. Parnell (2001) remains optimistic that the situation will improve. Drawing on their experience at BP, Collison and Parcell (2001) have written *Learning to Fly*. In a sense an introduction to knowledge management they indicate that the way to increase productivity is by sharing know-how. It is a very useful text providing theory and how to turn it into practice, and is well designed with side bars, diagrams, recaps, and points of reflection.

There has been much discussion about knowledge management in the literature in recent years and a number of conferences have been organised. It has its roots both in professions allied to management, e.g. human resource management; information technology e.g. information systems; and the ILS sector.

An issue of *Journal of Information Science* carries three papers on aspects of knowledge management (KM). Cronin (2001) discusses KM, organisational culture and Anglo-American higher education noting that KM "is all too frequently marketed like a performance-enhancing drug". His paper is important for putting the issues in an organisational context and discussing ways of applying the theory. Strategies for making intranets user-friendly are discussed with examples by Hall (2001). Research which explored senior management's perceptions of the positive and negative factors that foster or hinder the social work environment in the UK advertising industry is reported by Ensor *et al.* (2001).

Singapore is a small country with no natural resources that has to rely on human capital in knowledge-intensive organisations. Poor knowledge management can lead to high costs if the institutional memory is lost, knowledge gaps and poor decisions. Luen and Al-Hawamdeh (2001) describe the way that KM principles and practices have been applied in police work.

Shin *et al.* (2001) take a critical look at the three main schools of knowledge management which conceptualise knowledge as situated in the mind, process and object and assesses the implications for KM. They offer a conceptual model for a future research agenda for the

development of theoretically grounded, yet practical, KM business tools and applications.

Koenig (2001) contributes to a memorial issue of *Scientometrics* in honour of Berver C. Griffith and argues that the rich body of literature examining communications flow in the research context has very direct relevance to the emerging concern in the business community about the importance of knowledge creation and deployment to the competitive performance of an organisation. He examines some of the tensions such as those between open and rich communication versus the need to protect intellectual property, the importance of environmental awareness and serendipity, and achieving the correct balance with efficient use of searching time, the importance of end user training, and crafting the balance in KM between codification and personalisation.

In an issue of the *Journal of Information Technology* reporting a conference held at Warwick University in 2000 entitled "Knowledge management: concepts and controversies", Raub and Pulling (2001) describe the structure and development of the KM discourse over an 18-year period, emphasising the role of the information systems/information technology community in shaping this discourse.

Fennessy (2001) discusses how knowledge management problems arising in evidence based medicine and health care can be explored using soft systems methodology and action research. A case study illustrates how work teams and systems can be better utilised to provide clinical effectiveness information for busy health care practitioners.

Jantz (2001) examines issues of knowledge management within academic libraries and how reference librarians can become more effective intermediaries. Exploiting knowledge can be a major competitive advantage for libraries, which can translate into better service for users. A new management tool for managing and using informal knowledge is described which has been introduced in the New Brunswick Libraries at Rutgers University.

Augier *et al.* (2001) focus on the need to understand the context which is vitally important to understanding how people create, use and share knowledge, and examine the way in which complex problem solving is handled.

Two papers by Kesner (2001a, b) define knowledge management, and present a seven-stage business process mapping methodology which converts data gathered into an action plan and the metadata needed to construct a KM platform.

Salisbury (2001) provides an example of managing the knowledge creation process for a small work group.

Ethics

The American Library Association's new code of ethics appears in a revised edition of its *Intellectual Freedom Manual* (Office of Intellectual Freedom, 2002). The volume contains the policy statements on a range of issues.

Ethics in relation to the provision of information in Slovenian public libraries was investigated using the topics of suicide, necrophilia and pictures of corpses in a paper entitled "Excuse me, how do I commit suicide" (Juznic *et al.*, 2001).

Library Trends has focused on ethical issues in information technology covering points such as malpractice, plagiarism, credibility, the social nature of information, educating library professionals, global information justice, etc. (Wengart, 2001).

The growth of the Internet has made gatekeeping difficult in terms of minimising plagiarism and Hannabuss (2001b) suggests that popular views of plagiarism may not be flexible enough.

Conducting research

Booth and Falzon (2001) have identified a number of barriers to the conduct of research in health sciences information services. They include a conflict between the pragmatic concerns of running a project alongside existing services, the need for rigorous and transferable experimental studies, the tension between qualitative and quantitative research paradigms, and a proven lack of success of integrating projects into mainstream service delivery.

The use of focus groups to study users' needs at the University of Wales Institute Cardiff is described by Welsh (2000).

Reflections

The literature this year has seen growth in some areas, particularly of issues related to diversity. Leadership remains a concern both in the fields of general management and within the sector. This seems to be exacerbated by the retirement of a generation that entered the workforce in the 1960s – a generation that worked through rapid expansion in comfortable economic conditions – and then experienced a decline in funding. They gained considerable experience of management, and it may not have been easy for those entering in the 1970s and 1980s to develop management skills since their chances of promotion may have been less than those of the earlier intake. Now the challenge is to bring new recruits into the profession, particularly in the public sector where salaries and prospects are less than in the private sector. To this is added the level of public scrutiny of the quality of the services, and the challenges of seeking additional funding by identifying donors and bidding for additional government grants.

Staff at large also have to meet the challenges of contributing more to the cost of their professional education and development both at the outset and during their careers. At the same time more people have contracts rather than permanent posts, and in the UK final salary pensions are gradually being withdrawn in favour of stakeholder pensions.

In the private sector there is the acknowledgement that information which is relevant and accurate is a powerful lever for success, and hence the rapid take-up of knowledge management.

Concerns about the hybrid library and other technological issues seem to be fewer than in the past and many achievements are recorded, with some good papers on managing change.

Research should perhaps be a cause for concern as few graduates, across all disciplines, are enrolling for research degrees. At the same time government funding for research is limited to applied research and that which supports policy formulation.

Collaboration between the archives, information, library and museum sectors is being encouraged by governments in several

countries through the establishment of cross-sectoral agencies.

A special issue of the *The Economist* (2001) carries the title "The world in 2002" and indicates that 2002 will be a year of convalescence following the terrorist attacks, military interventions and an economic recession. This is a source for an overview of what may happen in political and economic terms around the globe, and includes the world in figures shown by country and indicators. In a section on management it notes the fall in the number of CEOs departing from their organisations, noting that companies have suddenly begun to question whether the chief executive is really at fault when things go wrong. The impact of the euro is considered and, perhaps, it is not surprising that Bill Gates writes that the first ten years of the twenty-first century will be the digital decade.

Making predictions seems to be hollow in a year when terrorists shook New York. The staff of the ILS school at the University of Pittsburgh contributed an analysis of the implications of the attack in a paper "The day the world changed: implications for archival, library and information science education" which appeared in *First Monday* (http://firstmonday.org/issues/issue6_12/cox/index.html). Before that event concern about disaster management was broadening – undoubtedly more services will have carefully examined their policies and practices. One tiny, but significant, aspect of the attack that was widely reported in the media, was the showers of paper that fell to the ground – we are not yet in the age of the paperless office.

Finally, some much needed wit at the end of a long review. "Only librarians use any medium that works to gather any data that is true to serve the client. For librarians it ain't over till the client is happy. We work for smiles." "Knowledge is not a place or medium. Knowledge is the light in a customer's eyes. All librarians should know that it's only data until you see the 'Eureka' shining on the patron's face. Then and only then does information become knowledge". The quotes are from *The Quintessential Searcher: The Wit and Wisdom of Barbara Quint*, edited by Block (2001). Quint is a US contributor to a number of journals on the subject of online searching. It is a small volume that will lighten the day of online

searchers, reference staff, and information staff. Could be a good present from a manager who values their colleagues ...

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