



Strategic planning and management for the public libraries

Planning and management for public libraries

The case of Greek central public libraries

253

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Received 22 August 2008
Revised 3 November 2008
Accepted 18 November 2008

Abstract

Purpose – The purpose of the paper is twofold: to provide an overview of the present situation at the Greek central public libraries and to identify strategic development areas in regard to education and training, social and economic development, e-government, reading policy, cultural cohesion and identity.

Design/methodology/approach – A survey was conducted in January and February 2008 through extensive semi-structured interviews with all the 29 Greek central public libraries.

Findings – The paper finds that a formal strategic plan is becoming necessary for the Greek central public libraries in order to understand themselves, redefine their policies and priorities, and further consider the needs and expectations of their users and of the society as a whole.

Practical implications – This paper contributes to the discussion on the development of strategic planning aimed at the central public libraries in Greece and may assist in providing evidence for strategic planning in a national and/or in an institutional level.

Originality/value – It is one of the very few studies in Greece providing empirical evidence for the strategic planning and management of the central public libraries.

Keywords Library management, Strategic planning, Public libraries, Greece

Paper type Research paper

Introduction

Libraries and information services are the treasuries of knowledge and of memory (Lerner, 1998). Since their origins they preserve the cultural heritage and at the same time they try to satisfy the needs and expectations of their users. Their role has been significant in the transmission of knowledge and of information, in scholarly communication, in promoting reading and furthermore in helping people to be useful community members. In that context, the library and information service presupposes certain organization and management strategies. A strategy promotes consistent behaviour over time so as the library could be able to adapt to the new circumstances. Strategic planning aims to “disperse uncertainty” (Pacios, 2007), and thus guide libraries within the complex environment they operate.



Library Management
Vol. 30 No. 4/5, 2009
pp. 253-265

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0143-5124
DOI 10.1108/01435120910957913

Evangelia-Maria Laskari passed away on the 19 August 2008.

A quite extensive historical analysis of the structure and evolution of the strategic management field over the last 26 years is provided by Furrer *et al.* (2008): the practice of strategic management has gradually shifted from financial planning in the 1950s and earlier to long-range planning in the 1960s and to the strategic planning in 1970s, and finally to strategic management in the 1980s and onwards. Over the last decades the rapidly changing environment generates a new dynamism and a severe competition that need to be taken into account. Therefore, strategic management thinking, in order to be pragmatic, must accommodate the current turbulent environment rather than the quite unlike long stable environment. A strategy is defined by Matthews (2005) as a guide for future action that focuses on the whole of the library rather than on its individual operations, and he further argues that “strategies are about making choices and deliberately choosing to be different”. The relationship between strategic and operational programming is complementary, with the latter supplementing the former (Ackoff, 1968). The strategic plan is a “communication tool among all interested parties” (Rowley, 2006). Overall, long term planning expresses the library’s organizational and management culture, as well as the professionalism of its employees (Pacios, 2004). Nowadays, the tradition and role of the libraries are widened through the introduction of novel information technologies, new information services for all groups of user categories, the forming of reading policy in a hybrid (both digital and conventional) environment, collaborations with public and/or private institutions, as well as other economic and management issues. Strategic planning aims mainly to guide libraries towards services’ development in this changing era.

Although some improvements have taken place over the last two decades in the Greek central public libraries, strategic planning as well as other contemporary management practices seems not yet to be a priority. This paper first focuses on some important issues concerning the management of public libraries including the exploitation of new information technologies, finance, education and training of the staff, the widening of the reading audience and the need for a reading policy. Thereafter, a brief overview of the Greek central public libraries is provided and a qualitative survey follows. The survey has been conducted in January and February of 2008 through extensive semi-structured interviews with the directors of all the 29 Greek central public libraries.

“Libraries for all”. Issues for their strategic development

Boring the theme of a conference recently held in Prague by the National Library, one may suggest that the public libraries need to understand themselves and the world around them. Strategic planning may indeed help towards this direction, and hence a plethora of such approaches as well as relevant studies have been made available in the international literature (e.g. Pacios, 2007). Public libraries since the nineteenth century have indeed been the “libraries for all”, libraries for the people; every citizen could have access in the services of a public library (Lerner, 1998). The “ancestor” of the public libraries is the Biblioteca Marciana in Venice, founded in the second half of the fifteenth century, which was the first library of a city and not of a monastery or a humanist or a member of aristocracy (Zorzi, 1987). Nevertheless, “real” public libraries started to be created after the Enlightenment and the Industrial Revolution. The enlargement of the reading audience, as well as social, political and economic issues led to the need for public libraries, where the “new” readers/users (women, children, workers, middle and

lower classes) could find the books they needed, been informed and further cultivate their reading taste (Lyons, 1999; Lerner, 1998).

In Britain, according to the Public Libraries Act in 1850, cities were allowed, but not yet required, to create public libraries and expend tax money on their maintenance. "The law was one of many social reforms undertaken as a response to the rapid growth of urban centres after the Industrial Revolution" (Lerner, 1998). In the USA, libraries were considered to help substantially every incoming person so as to be a citizen of the country. In that context, the public library had a constant value, being in the centre of the city among the other "important" buildings forming thus – through its collections, lectures, exhibitions, editions – a nucleus of knowledge, information, communication and freedom. Public libraries' aims and goals worldwide have been also expressed in the context of "The Unesco Public Library Manifesto – 1972", the "IFLA Standards for Public Libraries – 1973/1977" and "The Oeiras Statement – 13/14 March 2003". The library has been a hospitable and "open" place available to all community members, supporting diversity and strengthening community ties.

Nowadays, although the traditional library services carry on (book lending, information provision, etc.), novel information technologies have expanded the operation processes and the services provided by the public libraries (Chowdhury *et al.*, 2006). Digitisation of the collections, creation of information centres with free access to the internet for all users, online catalogues and other online services have altered the profile of public libraries. Indeed, the ability of utilisation or not of information technology caused a generation gap defined as "techno-gap" (Snowball, 2008); therefore, young people play a significant role and their perceptions and needs ought to be further considered in library's management and planning. In that context, the internet and Web 2.0 services are currently used by many public libraries in order to inform and encourage especially the young people to be members of the library (Chowdhury *et al.*, 2006).

Reading policy should be high in the priorities of a public library. More specifically, the aims of the reading policy include the promotion of reading, the eradication of illiteracy, the widening of the reading audience, and reader development, thus the cultivation of taste in reading (Banou *et al.*, 2008; Krolak, 2005; Elkin *et al.*, 2003). Public organizations (local authorities and/or central government organizations) ought to further support public libraries, since they are still the main resource for their funding (Wilson, 2008). On the other hand, public libraries could start to exploit new opportunities and promote new capacities in order to gain the appropriate funding (Fitzerald, 2004). Furthermore, public libraries require access to consortiums, "as strategic opportunities arise more steadily for the consortium than for the stand alone library" (Fitzerald, 2004, pp. 27-28).

Public libraries may further be viewed as "street corner universities", thus as significant factors in the social, cultural, economic and educational life (Broady-Preston and Cox, 2000). Some claim that public libraries must evolve and become more dynamic, extroverted, with a vision for the future (Kent, 2002). In that framework, competencies and skills of librarians need to be strengthened and the role of information scientists must adjust to the new environment (Korobili-Xantinidou *et al.*, 2003; Teng and Hawamdeh, 2002). Besides the technological information infrastructure the current complex environmental conditions require now, perhaps more than ever,

that the human capital of the public libraries to be utilized and reinforced through investments on continuing education and lifelong training.

An overview of the Greek central public libraries

Most of the public libraries in Greece have been established at the beginning of the nineteenth century, and more precisely after the foundation of the Hellenic State in 1830. The origins of some of them can be found before 1830, as for example the Public Libraries of Zante (seventeenth century), of Corfu (eighteenth century), of Andritsaina (early in the nineteenth century), of Samos (early in the nineteenth century). In Greece nowadays there are 46 public libraries, supervised and financed by the Greek Ministry of National Education and Religious Affairs. Of them, 29 are defined as “Central” (Metropolitan) Libraries; the term “Central” (Metropolitan) refers to a library which has in its responsibility a wider district, usually the whole prefecture in which it belongs to. It should be mentioned however that in Greece there exists a distinction between “public libraries” that are under the control of the Ministry of National Education and Religious Affairs and “municipal libraries” that are controlled by Local Authorities Organizations, and therefore they report to the Ministry of the Interior, Public Administration and Local Authorities. The operation of the municipal libraries is mainly based on the Local Administration Municipal and Community Law for the public authorities (Law 3463/2006 and Presidential Decree 185/2007).

The degree to which public libraries in Greece of all types have been developed was decisively influenced by economic, social, cultural and demographic issues, the geographic location and tradition of the library has also played a significant role (Kostagiolas and Korkidi, 2008). This is evident in surveys carried out by the National Book Centre of Greece stating that only a small percentage of the Greek community is registered at the local library. However, the percentages vary on age and level of education of the user, the geographic location and the history of the library (Banou *et al.*, 2008). Some central public libraries in Greece have made considerable efforts to develop new information services, in many cases with the financial support from the European Community. These efforts include the development of the “Hellenic Public Libraries Union Catalogue” which is a unified catalogue providing access to monographs, serials, audiovisual material collections. Moreover, all the central public libraries own at least one bookmobile library unit and equipment for providing library services to people with disabilities. It must also be noted that nine of the public libraries are characterized as historical, since they were founded at least 100 years ago and old and rare books are included among their collections. Furthermore, many Greek public libraries have information centers providing free access to the internet, databases and other information resources.

An empirical study for the Greek public libraries

Methodology for the study conducted

The empirical research conducted was based on the development of a semi-structured questionnaire distributed to all the public library directors agreed to participate at the survey. The questionnaire took its final form after a qualitative pilot study with a group of experts consisting of two library directors and three academics. The questionnaire comprised questions of open and closed type and was divided into three sections: Section A consisted of 11 closed ended questions and one open ended

question, all documenting information for the library directors as well as information about the library's background. More specifically, within the open-ended question of the first section further environmental information about the current situation of the public libraries was recorded in a SWOT analysis arrangement (strength, weaknesses, opportunities, threats). The SWOT analysis provides evidence on the library's position in regard to the external and internal environment. As it is suggested by Pacios (2004), a number of scholars employ this type of analysis in order to help identifying the library priorities in the future development through an "exploration" of the environment. Section B of the questionnaire examines if specific information services are present in the Greek central public libraries, in the lines of the five axes employed by Kostagiolas and Korkidi (2008) for strategic planning in the Greek municipal libraries:

- (1) Learning/education/training (library and information services provision for the support of primary and secondary education, adult basic education programs, life long learning, reading policy development and collaboration with higher educational institutions).
- (2) Social/economic development (library and information services provision for the support of local tourism, public health, entrepreneurship, as well as special issues including legal, tax, etc.).
- (3) Electronic government and citizen participation in public affairs (library and information services provision for the support of electronic government services, communication with decision makers and government officials).
- (4) Cultural identity and social cohesion (library and information services provision for the multicultural and multilingual support of various citizen groups).
- (5) Social inclusion (flexible opening hours, accessibility to the disabled, provision of mobile library services, etc.).

The last section of the questionnaire (section C) aims at the investigation of the existence or not of a formal long-term plan. Furthermore, the library directors' perceptions for the need of such a plan are recorded. The interviews took place within the first months of 2008.

The profile of the research

It is important to note that all the central public libraries' directors (in total 29) throughout Greece agreed and participated in this research. Most of the participants hold a university degree. The 34 per cent of them stated that they have been working at the same public library for up to five years, 7 per cent from five to ten years, and 59 per cent for more than 15 years. The study participants reported the size of the collections of the central libraries to be as follows: 10 per cent are rather small with 5,000-10,000 titles, 7 per cent have 10,000-15,000 titles, 14 per cent have 20,000-40,000 titles, and more that 40,000 titles hold the 69 per cent of the Greek central public libraries. Most of the central public libraries (97 per cent) use ABEKT automation system (developed by the Greek National Documentation Centre) and only one (3 per cent) employs the ADVANCE automation system. Moreover, only two central public libraries have their whole library collection catalogued, while the 62 per cent (i.e. 18 central public libraries)

have most of their collection catalogued and the 31 per cent (i.e. nine central public libraries) have only a small part of their collections catalogued.

Environmental analysis for the public libraries in Greece

In our research, the 29 library directors were asked to state for the central public library the five most significant strengths and weaknesses from the internal library environment as well as the five most significant opportunities and threats from the external environment. An analysis of this nature may provide evidence in at least three planning directions: Strengths/weaknesses plans are formed so as a library can overcome its weaknesses from the internal environment, through employment of its strengths; strengths/opportunities action plans take advantage of the library strengths so as to gain from the opportunities that arise in the external environment, and strengths/threats action plans take advantage of the library strengths in order to avoid the threats from the external environment. The 97 per cent of them, i.e. 28 library directors, completed the SWOT analysis and the most frequent answers are recorded in Table I.

The overall impression from the information provided in Table I is that the directors' perceptions for the strengths of the Greek central public libraries are mostly tradition-centred (i.e. derived from the history of the library, the material with particular cultural and historical interest to the local community, and the library as a place within the centre of the local community), and the weaknesses are resource-centred (i.e. lack of government financial support and of specialized personnel). The opportunities, however, are mostly derived from the European Union (EU) policies and from the changing role of the library within the local communities; while the threats mostly come from the competition with international digital information services and the deterioration of the current resources including the libraries' printed material. The strategies of central public libraries in Greece may benefit if they are in a constant thoughtful dialogue with the EU values, policies and action plans. Similarly to all member states of EU, a number of initiatives have been

Strengths	Internal environment		External environment	
		Weaknesses	Opportunities	Threats
1. Old and rare books		1. Lack of financial resources	1. New information needs of the community	1. Insufficient government funding
2. Collection of material with particular cultural interest to the local community		2. Lack of specialized personnel	2. European Union policies, initiatives and projects	2. Lack of national planning for the central public libraries
3. The library building is well situated and established within the local community		3. Outdated library surroundings	3. Lack of competition in the surrounding area	3. Intensification of national and international media and digital information services
4. Modern equipment		4. Lack of motives for the personnel	4. Higher education institutions in the surrounding area	4. Library material deterioration and theft
5. Friendly personnel		5. Outdated organizational structure	5. New law for the organizational structure of the central public libraries	5. Changing demographic characteristics

Table I.
SWOT analysis for the Greek public libraries according to the library director's perceptions

introduced through European projects, which altogether have aided the public and academic libraries in Greece to gradually expand their services and improve their facilities.

The analysis of Table I may further reveal the need for mutual and nationwide action plans that can indeed be significant to all. Such an investigation may form the basis of a national policy especially for the public libraries in Greece. A national policy of this nature is required for a number of reasons including the development of specific action plans in order to cope with common challenges and problems, the development of wider projects and collaborations among the central public libraries in Greece (such as the development of the public library union catalogue) and the accomplishment of economies of scale for a number of library investments. Furthermore, the central public libraries in Greece share a common legal and socioeconomic background, history and challenges including the gradual increase of multilingual and multicultural demand for library and information services. A centralized national policy for the Greek public libraries may overall support the development of public libraries, and thus every effort in this direction should definitely be encouraged.

Empirical research results

In Table II the results of the second section of the questionnaire are presented through the provision of the actual percentages for the twenty information services included in the action guidelines examined. The first column of Table II presents the distinct services examined, while the next columns exhibit the actual percentages of the existence or not of these services. In regard to the first category of Table II (B.1 “Learning – education – training services”) it appears that the Greek central public libraries support elementary and secondary education (the 93.1 per cent of them have made available related library and information services), and quite a few of them (62.1 per cent of the Greek central public libraries) collaborate with higher education institutions. However, very few central public libraries have developed information services for supporting formal adult education programmes, as well as other specific information services such as reading development.

In the second section of Table II (B.2 “Socioeconomic development services”) it can be seen that about the half of the central public libraries in Greece provide information services for the visitors (services related to the local tourist product/market) as well as information for other special issues, such as law, citizen rights etc. However, only one third of the central public libraries provide information services related to businesses and entrepreneurship and very few have developed information services related to public healthcare issues. As can be noted from the results presented in the third section of Table II (B.3 “E-government” services category), the 69 per cent of the central public libraries in Greece do provide information services supporting e-government and about half provide services supporting communication of the citizens with the government officials (mainly directed towards the local authorities officials). The changes in the demographic composition of the Greek population towards a more multicultural and multinational arrangement encourage the need for library and information services to satisfy the different cultural identities and strengthening the social cohesion. Thus, most of the libraries gradually develop printed foreign language collections and/or provide material for the culture and history of other countries. However, there seems much to be done in regard to multiculturalism in information services in Greece and

Section B	Yes (%)	No (%)	N/A (%)
B.1 Learning – education – training services			
B.1.1 Services supporting elementary and secondary education	93.1	6.9	0.0
B.1.2 Collaboration with technical institutions and universities	62.1	37.9	0.0
B.1.3 Adult education programmes	3.5	96.5	0.0
B.1.4 Reading policy (reading groups, children's books reading "relays", etc.)	27.6	72.4	0.0
B.2 Socioeconomic development services			
B.2.1 Local tourism development services	44.8	55.2	0.0
B.2.2 Public health services	6.9	89.7	3.4
B.2.3 Entrepreneurship support services	34.5	65.5	0.0
B.2.4 Special issues services (legal, tax, citizens rights)	44.8	55.2	0.0
B.3 Electronic government services			
B.3.1 E-government services	69.0	31.0	0.0
B.3.2 Electronic forum available for citizens to come into contact with interest groups (political organizations, cultural groups, etc.)	17.2	82.8	0.0
B.3.3 Electronic communication with government officials	51.7	44.8	3.5
B.4 Cultural identity and social cohesion services			
B.4.1 Collection includes conventional foreign language material	86.2	13.8	0.0
B.4.2 Digital access to foreign language material	27.6	69.0	3.4
B.4.3 Greek and foreign historical materials available	86.2	6.9	6.9
B.4.4 Greek and foreign cultural materials available	89.7	10.3	0.0
B.4.5 Programmes supporting multiculturalism (for example, organized reading groups for foreign students)	3.5	96.5	0.0
B.5 Social inclusion services			
B.5.1 Flexible opening hours (afternoons, Saturdays)	93.1	6.9	0.0
B.5.2 Disabled access to the library facilities	58.6	41.4	0.0
B.5.3 Special services for individuals with special needs (i.e. computers for the blind, braille texts, etc.)	75.9	24.1	0.0
B.5.4 Mobile library services (for institutions, prisons, hospitals and the housebound, etc.)	31.0	69.0	0.0

Table II.
Results regarding the existence of specific information services in the Greek central public libraries

only a few central public libraries seem to have the resources in order to organize formal programmes for the support of the previous issue, including access to foreign databases and digital material.

Concerning the last category of Table II (B.5 "Social inclusion services"), a high percentage (93.1 per cent) of library directors stated that the central public libraries are accessible on afternoons and on Saturdays. However, only about half of them do provide convenient access to people with physical disabilities and/or special library and information services to individuals with disabilities, although equipment for this purpose was made available to all the public libraries in Greece. The provision of library services to people with disabilities in Greece has been extensively studied in Koulikourdi (2008). Furthermore, it is interesting to note that bookmobile services are offered by almost the one third of the central public libraries for the institutionalized persons, although all central public libraries in Greece have a bookmobile unit.

The final section of the questionnaire consists of four questions investigating the existence of long-term planning, as well as the factors affecting its development. Evidently, only three Greek public libraries have developed a formal strategic plan and only one of them is a central public library. These are the Veria central public library, the municipal library of Thessaloniki and the municipal centre for historical research and documentation of Volos. In particular, the strategic plan of Veria central public library for the period 2004-2007 constitutes the first attempt, and is certainly leading the way for other libraries in Greece. The aim of the Veria public library is to become the best public library in Greece, responding to the changing needs of the community members by adopting new technologies and constantly expanding the services provided. A long-term plan covering the years 2006-2015 has been developed for the Municipal Library of Thessaloniki, and a plan for the period 2008-2009 has been developed for Municipal Centre for Historical Research and Documentation of Volos. Four library directors further stated that a strategic plan is under development and as can be seen in Figure 1 most of the library directors expressed a positive opinion regarding the development of a strategic plan for their public central libraries. However, only three of them state that they have the necessary resources for the development of a strategic plan.

The library directors were invited to express their perceptions regarding the five most significant issues to be included in a strategic planning of the central public libraries in Greece. The 93 per cent of them (i.e. the 27) did answer and a hierarchy has been created regarding the most frequently issues stated, as follows:

- (1) New and/or maintenance of library buildings (14 comments have been made).
- (2) Personnel increment both qualitatively and quantitatively (14 comments have been made).
- (3) Library collection expansion (11 comments have been made).
- (4) Digitization of library material (old and rare books) (ten comments have been made).
- (5) Assuring and improving the quality of library services (ten comments have been made).
- (6) Library material cataloguing (nine comments have been made).
- (7) Reading development and reading policy (nine comments have been made).

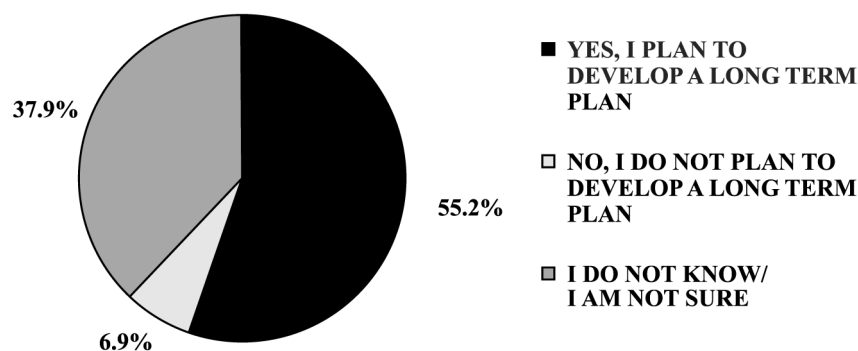


Figure 1.
Perceptions of the central
library directors for the
development of a formal
long-term plan

- (8) Cultural and educational events (eight comments have been made).
- (9) Financial resources and development of EU projects (eight comments have been made).
- (10) Co-operation with local authorities (eight comments have been made).

The dissatisfaction with the library buildings condition as well as the lack of a centralized national policy for the public libraries in Greece has also been pointed out in this research together with the lack of support from ministries, local authorities and other government organizations. Nowadays, public libraries in Greece are facing additional challenges and they all need the support they can get. Their new emerging role including the changing social, technological, educational and economic environment in Greece requires up to date management tools. Although a number of issues concerning the public libraries are common, one should not ignore the fact that each library is unique. This uniqueness should be reflected in each distinct strategic plan, which should express individual values and local needs considering the history and tradition of each library.

Conclusions

This work has provided an overview of the Greek central public libraries and recorded the perceptions of the library directors regarding the development of strategic plans. The Greek central public libraries are indeed facing new challenges in a period of reduced financial resources, while at the same time they should continue to preserve the memory of the local community. A strategic plan may aid to set priorities and thus support their management. Libraries in Greece certainly need to plan in order to extend their services to the youth as well as to other groups of the population. Hence, formal strategic planning may further help them to gradually develop a more dynamic role, than the rather “shy” profile they traditionally have. The development of the library’s strategy should support the diachronic role of the public libraries as a centre of the city’s activity. The EU policies, initiatives and projects, as well as partnerships and collaborations may further support the development of the public libraries in Greece.

The central public libraries are overall more mature than the rest of the public libraries in Greece. This is further suggested by comparing the results by Kostagiolas and Korkidi (2008) to the ones produced here: a significant larger number of central public libraries in Greece than municipal libraries collaborate with universities and higher technological institutions, provide information services related to local tourist product and/or to other special issues (e.g. legal information), include e-government services, include foreign material and/or provide access to foreign digital resources, and provide services for the people with disabilities. This fact makes their role even more important for the socioeconomic environment in Greece. The 29 directors stretched the need for strategic planning in both national and organizational levels. In particular, a number of action plans and initiatives can indeed be centrally administrated within a national framework. Hence, such a nationwide strategy may further empower the unique identity of the Greek central public libraries and may help them to differentiate among other public libraries around the world.

The environmental SWOT analysis conducted suggests that the 29 directors perceive the changing external and internal environmental factors as an opportunity for the public libraries. They further recognized that the old and rare books included in

the collections are important and they should be employed for new services development. The history, culture and the unique position of the central public libraries in Greece, as well as their collections closely related to the area and the local community needs to be further exploited. Collaborations with universities and development of R&D efforts which may be based on the EU policies and directives can also be utilized so as to struggle against the treats and weaknesses. Indeed a formal planning based on evidence may come to rescue central public libraries in Greece and significantly aid to their further development.

Meanwhile, reading policy, including the promotion of reading and reader development, should be included among the values of public libraries. "The aim of the reading policy of libraries is as well to cultivate a reading taste capable of moulding the intellectual, moral and aesthetic attributes of the readers" (Banou *et al.*, 2008). As reading methods and reading behavioural patterns have been re-defined due to the novel information technologies (Bolter, 2001), research on the reading habits of libraries' users and of the local community is necessary. In that context, bookmobile libraries' services for institutions, prisons, hospitals and the housebound play a central role in the promotion of reading. The existence of common features in public libraries cannot ignore the fact that each library is unique. Many regions in Greece lack up-to-date public libraries. The development should include the exploitation of each library's unique resources in a globalized information environment. In that context, cooperation especially with universities and other specialized institutions constitutes a necessary element for developing new library and information services. A successful strategic planning and management should put public libraries not only at the centre of the cities as a physical entity but it should also put them in the centre of the collective past, present and future wisdom.

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