

# **LIBRARY PUBLIC SERVICES**

**COURSE CODE: 9211      UNITS: 1-9**

## **STUDY GUIDE**

### **BS-LIBRARY AND INFORMATION SCIENCES**

**AIOU website:** <https://aiou.edu.pk>  
**LIS Department website:** <https://lis.aiou.edu.pk/>  
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## **Course Organization**

The course has been designed as easy as possible for distance mode of learning and it will help students in completing his/her required course work. The course is of three credit hours and comprises on nine units, each unit starts with an introduction which provides an overall overview of that particular unit. At the end of every unit the objective of unit shows student the basic learning purposes. The rationale behind these objectives is that after reading unit a student should be able to explain, discuss, compare, and analyze the concepts studied in that particular unit. This study guide specifically structured for students to acquire the skill of self-learning through studying prescribed reading material. Studying all this material is compulsory for successful completion of the course. Recommended readings are listed at the end of each unit. Few self-assessment questions and activities have also been put forth for the students. These questions are meant to facilitate students in understanding and self-assessment that how much they have learned.

For this course, a 3-days workshop at the end of semester, and four tutorial classes/meeting during semester will be arranged by the department for learning this course. The participation/attendance in workshop is compulsory (at least 70%).The tutorial classes/meetings are not formal lectures as given in any formal university. These are meant for group and individual discussion with tutor to facilitate students learning. So, before going to attend a tutorial, prepare yourself to discuss course contents with your tutor (attendance in tutorial classes/meetings is non-compulsory).

After completing the study of first 5 units the ‘Assignment No. 1’ is due. The second assignment that is ‘Assignment No. 2’ is due after the completion of next 4 units. These two assignments are to be assessed by the relevant tutor/resource person. Students should be very careful while preparing the assignments because these may also be checked with Turnitin for plagiarism.

## **Course Study Plan**

As you know the course is offered through distance education, so it is organized in a manner to evolve a self-learning process in absence of formal classroom teaching. Although the students can choose their own way of studying the required reading material, but advised to follow the following steps:

**Step-1:** Thoroughly read description of the course for clear identification of reading material.

**Step-2:** Read carefully the way the reading material is to be used.

**Step-3:** Complete the first quick reading of your required study materials.

**Step-4:** Carefully make the second reading and note down some of the points in note book, which are not clear and needs fully understanding.

**Step-5:** Carry out the self-assessment questions with the help of study material and tutor guidance.

**Step-6:** Revise notes. It is quite possible that many of those points which are not clear and understandable previously become clearer during the process of carrying out self-assessment questions.

**Step-7:** Make a third and final reading of study material. At this stage, it is advised to keep in view the homework (assignments). These are compulsory for the successful completion of course.

### **Assessment/Evaluation Criteria of Students' Coursework**

Multiple criteria have been adopted to assess students' work for this course, which is as follows:

- i. Written examination to be assessed by the AIOU Examination Department, at the end of semester= 70% marks (pass marks 50%). AIOU examination rules will be applied in this regard.
- ii. Two assignments and/or equivalent to be assessed by the relevant tutor/resource person= 30% marks (pass marks 50% collectively).

Note: Assignments submission and getting pass marks is compulsory, the student who will not submit assignments or marked as fail considered FAIL in the course. He/she will get fresh admission in the course; there is no need to sit in the exam.

### **Course Introduction**

The function of libraries is three-fold. Libraries acquire information, organize that information in a way it can be retrieved, and disseminate the information the library has acquired. The library is a service institution and provides various services to its users/patrons. The services provided by the library to

students, faculty members, research scholars and users can include instruction on how to access and use library materials; reference services to provide quick and in-depth answers to student questions; and materials delivery services that provide students with access to library materials online or items delivered to students' homes. Resources and activities provided by libraries to address information needs of users are circulation services, reference services, online information services, inter library loans, and information literacy skills training. These are the resources, activities, programs, etc. which provided by libraries to enable users meet their information needs. These are the various services rendered in the library to their users in the form of direct and indirect services in person and through communication technologies. These services can be provided outside the library's regular service center or outlet.

This course is planned for use in both graduate programs of library and information science and those undergraduate and technical programs leading to degrees and certificates for career service in libraries. It has also been widely used for training purposes within various library and information science departments to train students and library professionals. The main aim of this course is give a broadly based view of each of the functions of library public service. Here in this course we incorporated the duties and responsibilities of both professional librarians and support staff, which can overlap in different types of libraries, but the main function is the same.

The course has nine units. After the introduction unit there will be a second unit Reference Services (RS) are very important services in a library these services are provided by the reference department in a library that helps the library patron to get access to the information that they needed. Reference department provide library user with direction to the library materials, give advice on library collections and services on various kind of information form variety of sources. Reference department basically helps user to answer the questions that the users have in mind as well as helping the user to locate the information that they need in the library. Reference services may vary from library to library, but most libraries have an information or Reference Desk where assistance from a librarian is available. Almost all libraries provide reference services via the telephone and many libraries offer email, text, or chat services with a reference librarian. The third unit is about various reference sources, types of reference materials and online databases, the internet and knowing the library collection. The unit will also give an overview of in house resources, reference to outside sources and other libraries. The fourth unit will cover the main types of reference assistance or

instruction with using the library, including locating materials, using the catalog, using computers to access information, and using basic reference sources. It will also provide assistance in identifying library materials needed to answer a question. Providing brief, factual answers to questions, such as addresses, statistics, phone numbers, etc. that can be quickly located. The fifth unit will provide us the information about interlibrary loan and document delivery services which are the value added services. Interlibrary Loan (ILL) is the process by which a user of one library receives published material owned by another library in the same country, either as a copy or in the original format, for non-commercial purposes. ILL is sometimes a matter of local national copyright laws, but is not always expressly defined in local laws. It is understood generally that not every academic library can subscribe to every journal, and ILL is intended to help address academic library user access to content that is not considered “core” to their particular library (and not as a “substitute” for purchase or subscription). Libraries all over the world participate in Interlibrary Loan (ILL) in a cooperative effort to provide articles, books, and other materials to researchers, students, and others. The unit sixth is designated to circulation and reserve services. The unit also discussed the circulation control system, arrangement, storage and access to material. How reading material can be reserved and provided to users on demand? It also gives a picture of automated and manual ILL system. The sixth unit of course dealt with circulation and reserve services of library collection which are being provide to patrons. The unit explains about philosophy of circulation, circulation control system, stack maintenance and collection growth and shifting. It will also provide information in detail about the role and philosophy of reserve services, circulation reserve items system and keeping and using of library statistics. Special collections and serial collections are very important features of library services, the unit seven and eight are dedicated for these collections related services and provide information about the role and philosophy of these collections and gives detail information about collections storage etc. It will also give an overview of types of serials and their organization, access, and circulation decisions. The last unit of course will illustrate the media services and government information. It will elaborate the role of media in public service and philosophy of media services. The services provided by in respect to government information and types of government information will also be discussed in this unit. The course in overall is beneficial particularly for professional librarians, professors of library and information science, students

of library and information science and professional library support staff in general.

After an introduction to public library services in the first chapter, the remaining chapters focus on: reference services; reference sources; library instruction; interlibrary loan and document delivery; circulation services; reserve services; special collections; serial services; media services; government information; and security issues. Each chapter includes a summary, review questions, notes and suggested readings. Appendices include the ALA Code of Ethics, National Interlibrary Loan Code for the United States (1993), and Freedom to View Statement.

### **Objectives of the Course**

After completion of this course the students will be able to:

1. Understand the role and philosophy of reference services in the library.
2. Identify various reference sources and their characteristics.
3. Define information literacy and understand the role and philosophy of library instruction program.
4. Articulate the interlibrary loan and document delivery system and service provided by the libraries.
5. Demonstrate about the circulation and reserve services, and know how about the role and philosophy of circulation services and reserve services.
6. Explain the role and philosophy of serial services and special collections.
7. Discuss the role of media in public services and different types of government information.

### **Recommended Reading:**

Evans, G. E., Amodeo, J. A., & Carter, T. L. (2005). *Introduction to library public services* (6<sup>th</sup>ed.). Greenwood Village, Colorado: Libraries Unlimited.

Available at:

<https://digitalassets.lib.berkeley.edu/sunsite/Library%20Services%20in%20Theory%20and%20Context,%202nd%20Edition.pdf>



## **UNIT NO. 1 INTRODUCTION**

A library's primary function is to provide access to information considered useful or valuable to the society in which they exist. True to their introduction, Evans and Carter provide a solid, broadly based view of library public service and its functions. As in the preceding edition, its authors marry the importance of the help ethos with a plethora of technological tools and techniques. Coverage of such essential topics as circulation, reference, interlibrary loan, literacy instruction, reserves, and security has been extended, updated, and predicated on the importance of keeping a watchful eye on ethical and legal implications. New to this edition are discussions of staffing and training, customer service, programming, and assessment. The result brings into focus the duties and responsibilities of both professional librarians and support staff, with particular emphasis on areas of common concern.

Libraries are service organizations, when examining library mission and goals statements, one finds a strong emphasis on service. In the whole study guide and throughout the course contents you will find the words such as patron, client, use, and d customer with great frequency.

Traditionally, libraries divided their functional activities between two broad categories: technical and public services. Technical functions were and are those that secure and prepare materials for use. Public service functions are those that involve direct daily contact with the customer. In this study guide we cover the role, purpose, and philosophy related to each of the major functional areas of public service.

### **Role and Philosophy of Public Services**

Libraries are cooperative in several ways. People require information for their daily work, learning, and recreational activities. While it is true that, for a majority of individuals, necessary daily information comes from personal sources and resources, there are always some materials that are too costly, too complex, or too awkward for an individual to purchase or maintain. Libraries are one means individuals, organizations, and societies use to provide large numbers of people with substantial quantities of information at a reasonable cost. Looking at library history, we see that libraries have served their publics, parent institutions, and society in following four ways:

1. Libraries meet society's information needs by acquiring a wide variety of materials.

2. They provide a central location and proper environment for the storing and preserving of those items.
3. Libraries add value to the items acquired by organizing them for easy access, and
4. The library's staff improves access by providing assistance to individuals in locating needed information.

From an historical point of view, acquisition and storage of materials are libraries' first priorities. Early libraries provided limited access to materials, and almost no assistance. As collections grew in size and more of the public could effectively use the material, access increased. Today educational libraries expect to devote significant staff time to library instruction (LI) in addition to providing reference service. Library instruction serves two purposes: 1) it teaches the public how to use information sources independently, and 2) allows existing staff to assist an ever-increasing customer base or devote more time to complicated questions.

For library public service staff, there are two major goals. The first is to provide access to informational materials; the second is to provide assistance allowing the customer to benefit from the access. In this regard, libraries must provide the highest level of service through appropriate and usefully organized collections, fair and equitable circulation and service policies and skillful, accurate, unbiased, and courteous responses to all requests for assistance. Implementing this standard should be the goal of all public service staff, regardless of assigned duties. Free library service has been the tradition in most countries. In the past, customers outside the primary service group occasionally paid a fee for a service that was free to the primary group. Today, technology is slowly changing that tradition. No one thinks twice about charging or paying for photocopies made from library materials. Twenty years ago the idea of paying for an interlibrary loan (ILL) was a topic of heated debate. ILL charges to libraries and customers are now fairly common. Although completely free library services are becoming a thing of the past, libraries still offer many free services, and charges seldom recover the full cost of the service provided.

### **Basic Functions of Public Services**

As mentioned earlier, traditionally libraries have organized activities into two categories: those where direct contact with the customer occurs on a daily basis (public services) and those with very limited public contact (technical services). Technical services are acquisitions, bindery and repair, cataloging and serials control, while public services revolve around circulation and

reference activities. As principal operations of public services, circulation and reference involve direct contact with customers and responsibility for their needs. The only reason for the existence of most libraries is to serve a specific group of people. Customers judge a library on the basis of their experience with public services. Every public transaction adds to or detracts from the library's image. Keeping this in mind, especially when it is busy and the pressure builds is difficult; yet this is when library personnel must try hardest to provide good service.

Traditionally libraries employed some type of categorization of staff positions: librarians (professional), technical (paraprofessional), clerical (support), and part time. For library customers, anyone working in the library, even a volunteer, is a "librarian." This situation causes some serious staff concerns. This is one of the areas where labels or categories do matter. This situation causes some serious staff concerns. The application of technology "integrated library automation systems" and the Internet over the past 25 years has influenced and continues to influence library staffing patterns. One impact is that staff sizes have remained relatively constant in spite of increased customer demands and expectations. Automation allows technical service staff to handle changing and, in a few cases increased, workloads without additional staff. Occasionally it has allowed some libraries to shift positions from technical to public services. Certainly technology has a tendency to flatten the administration structure of the library, creating fewer levels of supervisors/ managers. Today's libraries require a much wider variety of skill sets than they did even 25 years ago.

One key to having a successful customer service-oriented library is making certain all staff members have adequate and appropriate training and development opportunities. There are several types of needs and opportunities; needs are related to a person's specific job duties, while opportunities may or may not be directly job related. It is believed that those libraries that provide employees with opportunities for continuing their education and encourage all staff to do so generally have high morale. There is no question that staff needs continuous updated training as libraries add to or upgrade existing technology. It is mandatory for all library staff to have opportunities to develop personal skills and knowledge that may or may not be directly job related. Staff training is essential and involves expenses as well as time away from "normal duties." Successful library operations require a team effort involving contributions from all staff members. A flexible work schedule is usually an option for any staff member taking degree-related course work- and job-related training. It is recommended for library

administration to chalk out a flexible work schedule to accommodate library staff.

### **Self-assessment Questions**

1. Define public and technical services in libraries.
2. What are the four ways libraries serve their societies?
3. Describe the two major goals for public service staff?
4. Discuss two purposes of library instruction service.
5. Why training is necessary for library staff? Explain.

### **Activity**

Prepare the chart of ten functions a paraprofessional librarian might perform in a library.

### **Recommended readings**

Abell, A. (1998). Information Professionals? Knowledge Professionals? Or Support Staff? *The Law Librarian*. 29 (1), 11-14.

Beales, K. (1989). Non-professional Information Training. *Education for Information*. 7 (March), 24-41.

Halstead, D. D., and Neely, D. M. (1990). The Importance of the Library Technician, *Library Journal*. 115 (March), 62-63.

Kaufman, P. T. (1992). Professional Diversity in Libraries. *Library Trends*. 41 (Fall), 214.

Manley, W. (1988). Facing the Public. *Wilson Library Bulletin* 63 (Nov.), 82-83.

Stoakley, R. (1982). *Presenting the Library Service*. London: Clive Bingley.

## **UNIT NO. 2**

### **REFERENCE SERVICES**

Libraries are no longer passive and archival institutions but are effective service institutions. The responsibilities of libraries go beyond gathering and organizing books and journals to include an active role in disseminating information. One way this can be achieved is through effective reference service. Reference service handles inquiry and assists user in find the information they require, access it and use it to meet their needs. Reference service helps to establish contact between a user and the right document at the right time, thereby saving the time of the user. A reference service includes question-answering service, search service/search help, bibliography service, and information and referral service identifying related web resources inside or outside. Those services are designed to provide information to users in response to identified needs. Instruction services can range from FAQ to citation guide. SDI service (current awareness service), legal notice, and news service are considered as guidance or advisory service. An important part of a reference service is in charge the reference interview, which involves a personal discussion between a user and the reference librarian. Through the interview the reference librarian not only tries to understand the specific information needs, but also collects information about the user, such as the user's subject knowledge, the purpose of finding the specific information, and so on. Based on the reference interview, the reference librarian is often able to filter the retrieved information in order to pick up the most appropriate sources for the given user at the given point of time. Other than that reference service especially academic library will conduct classes for user education program to help them searching the right information by using correct Boolean searching, databases and OPAC. User education program is very important in order to assist them search information according to their needs without having any problems. Libraries have also played a key role in providing information services in anticipation of user needs. Such services include various forms of current awareness and selective dissemination of information services that aim to keep the users abreast of the latest developments in their areas of interest.

The tremendous growth and continuous development of technology has decrease the number of user using traditional library services as well as reference service. There is pro and contra when technology makes everything easier. Technological developments have affected not only the formats and sources of the information, but also how and where to provide library

services. Libraries and their resources have partially moved to the virtual world of the Internet. As a result, library users can access the resources from outside the physical library. In an effort to reach users accessing the library via their computers, many libraries and library consortia are extending their services to include virtual reference. Technology now allows users to submit their queries to the library at any time from any place in the world. Library service on the internet requires many of the same qualities as traditional references accuracy, courtesy, an understanding of the information need. It provides users with the convenience of accessing information in their own time, saving them traveling cost and time and new options for answering reference questions. The provision of these services is not constrained by the traditional opening hours but can be offered on a 24-hour, seven-days-a-week basis known as 24/7.

### **The Role and Philosophy of Reference Services**

The role of reference services, and of the reference staff, is to make information available to library customers is very important. Librarians and support staff do this most directly by delivering persona service in response to requests for information. This personal service takes three primary forms:

1. Finding information to answer specific questions,
2. Helping customers find information for themselves,
3. Teaching people how to use library resources and how to do library research.

The purpose of reference service is to facilitate access to information. However, access the library by word of the late twentieth century, was not always the most emphasized of the fundamental aims of librarianship (along with collecting, organizing, storing, and preserving). Reference work ideally aims to answer fully every library customer's individual informational needs. Because of the realities of time, limitations on resources, and lack of universal subject expertise, however, no reference staff member can answer every inquiry. However, reference staff do use every resource at their disposal, physical and intellectual, to come as close to the ideal as possible. The level of service delivered by a particular library depends on the nature of the institution. Special libraries, especially corporate libraries, often find and deliver information directly to the requester as quickly as possible. Public libraries emphasize finding information for users and, in certain situations, helping users to locate information themselves. School libraries place a strong emphasis on teaching students about library use. Academic libraries probably deliver the most equal balance between these kinds of service:

providing specific answers, assisting users to find information, and teaching library use.

### **Education and Training**

Training for reference work in library schools has traditionally been unimaginative. Students memorize the characteristic of specific reference sources and perform exercises or case studies in the use of these sources to answer typical reference questions. General reference courses feature the most important reference tools in a variety of disciplines, while more specific sources are covered in specialized course, for example, humanities bibliography or legal bibliography. Bibliography courses lie these are necessary to introduce the students to the tools needed to provide reference assistance. Insufficient attention has been given to the value of interpersonal relations in reference work and to the importance of negotiating the “reference interview” in determining a user’s information needs. Courses on automated reference services were introduced into curricula during the 1970s and have since expanded in number.

### **Reference Interview and Types of Reference Questions**

Information seeker/requesters are often uncertain or unclear about what information they want. Sometimes it is because they have trouble expressing themselves. Often it is because they are not sure in their own minds what they want or need. The reference interview is the process whereby the staff member communicates and interacts with the user to determine how best to answer and information need. Reference interview is a conversation between a library staff member and a patron. The goal is to ascertain the patron’s information needs and take action to satisfy those needs through the use of available information resources. The reference interview is a critical part of library service. Being given insufficient, incomplete, incorrect, or even too much information presents serious problems to library customers. Following are the steps of the Reference Interview which can help reference librarian to articulate what information customers really need.

1. **Approachability:** Everyone who lives and works in your community needs information. Discovering the needs of each individual who comes into the library calls for people skills. Sometimes the first question a patron asks is really just trying to find out if you are approachable and friendly. These questions may range from “Do you work here?” to “Where are the dog books?” So, your job is to go from that initial contact with the patron to

actually finding out their needs. So that give a smiles, establishes eye contact with the customer and have a friendly greeting.

2. **Interest:** Being a reference librarian always maintain eye contact. Try to make attentive comments and give full attention to your patron/customer. It is obvious to speak in comfortable, relaxed tone. And ask at a confidential place to ask a question.

3. **Listening (Characteristics of a good listener):** A good listener gives patrons a chance to tell you what they want. Listening to a patron without interrupting or jumping to conclusions is a necessary skill for successful reference service. You need to discover what the patron really wants. There may be reasons why a patron is hesitant to ask the real questions they need answers to. What are the patrons' real information needs? A good listener does not interrupt. Paraphrase in your own words to demonstrate understanding (repeat back what the patron said in their own words without adding any thoughts or questions of your own. Paraphrasing can help with a patron who keeps repeating their request over and over). Ask clarifying questions if you are not sure about the request (Clarifying can be used to make sure you have all the details you need. Example: “Do you need black and white photos or color photos?”).

4. **Interviewing (Discovering what the client really wants):** Open ended questions are an effective way to give your patrons the freedom to express the information needs in their own words. Open ended questions cannot be answered with yes or no. Verifying a question gives you one last opportunity to make sure you understand the patron’s real question. Ask open ended questions to probe. (The open ended questions also give patrons a chance to express information needs in their own words. You don’t have to know about a subject with open ended questions. Let the patron tell you.) Closed ended questions just don’t get you much closer to the real information need. Verify specific question by paraphrasing and using a closed question to confirm request. Verifying avoids “jumping to conclusions.”

5. **Searching:** Keep customer informed of progress. Offer referrals while working on his/her request. This may be an opportunity to teach information literacy by searching with the patron.



6. **Answering:** While answering to customer query speak clearly and distinctly. Cite the source for authenticating the information and check with the customer to be sure the information is understood.

7. **Follow-up:** It is necessary component. Asking the patron if they have everything, they need improves your success rate. You know you have found the information the patron really wanted. Use appropriate follow-up questions or statements. The only way to make sure the patron has what he needs is to ask.

Reference questions come from every variety of human inquiry and curiosity, but most can be classified under the following categories:

1. **Directional Questions:** are those that ask for specific directional information or explanations of library policies and procedures. Examples are “Where can I get a drink of water? Where do you keep your magazines?”

2. **Ready Reference Questions:** are usually simple factual questions that ask for information, such as what is the population of China? How many pounds make a ton?

3. **Research Questions:** are reference questions involving several categories of tools for a comprehensive look at what is available on a particular topic. Research questions often require extended time, referral, or follow up contact with clients/patrons.

Everyday reference work exposes staff to the wide variety of human interests and problems. There are occasions on which we can indulge in longer conversations, friendly chitchat, or extended problem-solving interchanges with clients, some of whom may become part of a circle of regular clients. Solving clients’ problem and meeting gaps in information is a process of reference work involving many steps. This process may require mediation i.e. serving as an intermediary between the patron and the information to find the real gap in knowledge. The steps of the reference process include the following: 1) Encouraging the patron to contact the library when there is an information need – outreach. 2) Finding out what the real information need is - the reference interview. 3) Finding the information that will meet the need - reference search. 4) Making sure the patron's need really has been met - follow-up. A reference section staff can provide various reference services to a client some of them are as follows:

1. **Readers’ Advisory Service:** broadly defined, means helping readers find what they want by recommending specific titles. In this context it is

something that all reference staff occasionally do. Readers often ask for suggestions on what books to read on a particular topic, in a specific genre (for example, mysteries), or by a certain author.

2. **Consultation Services:** good reference work requires the same combination of knowledge, skill, imagination, persistence, and resourcefulness that serves the research scholar or the successful businessperson. Many professionals have come to rely on the skill of reference staff, especially at points in their work where their own resource are insufficient, or when they encounter a need for information in an area that is unfamiliar or in which they lack up-to-date knowledge.

3. **Service to Offsite Users:** part of the reference staff's duties may include service to offsite users. Libraries are contacted daily by telephone, letter, fax, web form, and e-mail for both readily available and research information. The request might be for library hours, the date of the sinking of the titanic, or a citation to an obscure article about which the requester has very little information. Electronic access to full text resources, delivered by the Internet, has made greater service to customers possible at distant satellite campuses. The library's reference service policy should address the level of service that is appropriate to deliver in support of distance education programs.

### **Effect of Automation on Reference Service**

Automation in libraries allows the library staff to better respond to the information needs of library users. Automated catalogs, online databases, networks, and the Internet have expanded the resources available to the library staff and greatly increased their ability to supply the information requested by customers. The ability to use electronic resources increases the professional competence and abilities of reference staff. To provide quality service, reference staff must know all the printed sources, as before, and also be knowledgeable about the available networked resources. Access to online sources in some cases changes the definition of quality reference service. Professional ethics require that reference staff give accurate information. Today, accurate (that is, the most up-to-date) information is only available online.

### **Ethical and Legal Considerations**

The performance of reference service has both affirmative and negative ethical and legal dimensions. The affirmative dimension includes the responsibilities and duties inherent in reference service regarding quality and

types of service. The negative dimension includes restrictions in such matters as medical, tax, and legal advice or interpretation. Information provided the user should be the most accurate possible, regardless of the type of question or the status of user. There is a lot of pressure on reference staff to provide answers. Customer informational needs should be met locally as far as is possible and practical, within the local constraint of available informational and human resources. Library service should be given efficiently, openly, and amiably. Because of legal and ethical complexities, there are limitations on the kinds of answers that can be given to patrons regarding medical, legal, and tax information. A user should always be helped to find information, but a user should never be given medical, legal, or tax advice or interpretation, even if the requester directly solicits it, unless the staff member is professionally qualified to give such information. Personal opinions on social, political, religious, and other matters can be given by a librarian in a social situation, but not as part of a reference transaction. There should be no personal financial gain resulting from the role of the reference staff member as a representative of the library in dealing with the user. In short, reference staff should be aware of and understand the ethical and legal limitations on reference service and be familiar with guidelines as presented in the reference policy of their institution.

Reference librarianship, with its emphasis on personal service; potential for positive feedback from satisfied customers; flexible hours; and wide variety of subjects, duties, and responsibilities, is at one the most rewarding and most demanding area of library service. With the expansion of information technology and its effect on the delivery of reference services, it is also the most interesting and challenging.

### **Self-assessment Questions**

1. Discuss the three primary role and philosophy of reference services.
2. What is reference interview? Explain various type of clients' questions.
3. Discuss some of the ethical and legal aspects of reference work.
4. Describe the effect of automation on reference work.
5. What type of service can be provided in reference work process? Explain.

### **Activity**

Visit any university library and observe the reference desk activities, note down in your notebook and discuss with tutor.

## **Recommended readings**

D'Aniello, C. A. (1989). Cultural Literacy and Reference Service. *Reference Quarterly (RQ)*, 28 (Spring), 370-380.

Gates, J. K. (1994). *Guide to the Use of Libraries and Information Sources*. 7<sup>th</sup> ed. New York: McGraw Hill.

Jennerich, E. Z., and Jennerich, E. J. (1997). *The Reference Interview as a Creative Art*. 2<sup>nd</sup> ed. Englewood, CO: Libraries Unlimited.

Katz, B., and Fraley, R. (1986). *Personnel Issues in Reference Services*. Binghamton, NY: Haworth Press.

Mendelsohn, J. (1997). Perspectives on Quality of Reference Service in an Academic Library: A Qualitative Study. *RQ* 36 (4), 544-557.

Rothstein, S. (1989). The Development of Reference Services Through Academic Traditions, Public Library Practice and Special Librarianship. *The Reference Librarian* 25/26, 33-156.

White, M. D. (1989). Different Approached to the Reference Interview. *Reference Librarian* 25-26, 631-646.

## **UNIT NO. 3**

### **REFERENCE SOURCES**

The reference collection is a collection of objects maintained for the purpose of study and authentication. Reference collections are generally large undertakings maintained by institutions; instead of having a single representative of each object, they will typically have multiples, so as to illustrate variations and, sometimes, provide samples for comparisons. The reference collection is defined as the information resources selected by the reference staff to do reference work. The library reference collection contains a selection of general and subject encyclopedias, dictionaries, directories, subject and national bibliographies, yearbooks, a wide range of language dictionaries, biographical sources and citation and editorial style resources offline as well as online databases.

#### **Characteristic and Categories of Reference Sources**

Reference sources may be available in any format, including paper, film, CD-ROM, or on the Internet. These resources may be housed in the library itself or accessed from remote locations via the library network. Every reference collection is unique, and the specific sources selected are based on the goals and objectives of the particular institution. Librarians build reference collections to do three things:

1. To answer the information needs of a library's clientele,
2. To facilitate access to the library's collection,
3. To provide guidance to information resources beyond the local library collection.

The librarian and support staff responsible for developing and administering the reference collection and establishes guidelines for including sources in the collection. Commonly the collection used by reference staff for answering patron's queries has two types of reference sources:

1. Those which contain the needed information, such as dictionaries, encyclopedias, almanacs, yearbooks, directories, handbooks, biographical dictionaries, atlases, and gazetteers; and
2. Those which tell the user where the information can be found, such as indexes and bibliographies. With the introduction of information technology then electronic reference sources are becoming popular day-by-day. Although CD-ROMs are going to be unpopular and less use form in developed and as well as in developing countries. However, the introduction of Internet (online database, information clouds, social media

etc.) has surpassed every form and resources and is gaining momentum day and night.

### **Selection/Evaluation of Reference Sources**

For becoming a good reference librarian and answering many questions of community needs it is needed that one must have full command on the use and selection of reference collection. While selecting the reference sources/collection reference librarian should consider following factors/guidelines as part of collection development policy:

1. **Usefulness in answering reference questions.** This factor is judged by the experience of the reference staff and study of questions asked by the library customers. A record of unanswered questions is fully as important as one of answered questions, because failure reveal deficiencies which should be supplied through selecting additional useful materials.

2. **Depth of coverage.** It is necessary to break down the collection into its subject areas, identify each type of material to be collected for that subject and the class of patron for which this area is primarily intended. Select the work with the purpose of which is to introduce subjects with brief discussions or in-depth information such as encyclopedia and yearbooks.

3. **Local needs.** Libraries find that the recurrence of certain types of questions requires placing appropriate materials in the reference collection. The history of a city or a local environmental impact report etc.

4. **Format.** Some works are place in a reference collection because they are designed to answer questions of fact and not to be read in their entirety. Such as almanacs, atlases, books of mathematical tables, dictionaries, and telephone books.

5. **Frequency of use.** Some materials, like local road maps, are placed in a reference collection because they are consulted frequently.

6. **Mission of the parent organization.** When considering the scope of materials, it is important to consider the mission of the parent organization.

7. **Expected customer groups.** In addition to recognizing the mission of the parent organization, it is important to know the different customer groups that expect to use the collection.

The reference collection is intended to provide answers to users of the main library and to also provide reference staff with the resources necessary to assist staff at the branch libraries in case of an academic institute. The purpose of the reference collection is to serve the scholarly and teaching mission of the institute. Most of the materials acquired for the reference collection are meant to support the curricular needs of the university.

However, a more limited portion of the collection supports general informational needs of library users. These resources include career and job-hunting resources, legal information for the state and local community, information about the local region, health and wellness resources, personal finance and investment guides, etc. The reference collection contains resources that provide answers to factual questions, overviews of topics, and gateways to extensive research sources. The collection also supports the daily work of library staff members who provide reference and instruction.

Although the reference collection is of primary importance in providing good services, reference collection development has not enjoyed a primary focus in the professional literature. Reference librarians usually have the responsibility for selecting reference materials, with input from the support staff. In addition to the selection guidelines/factors mentioned earlier, some of the more important considerations are the library budget, the resources of other libraries in the area, and the evaluation of reference materials. As new sources, in whatever format, are added or linked to the collection, staff members examine and evaluate them. When evaluating materials for purchase or use, reference staff should consider certain basic issues:

1. **Demand.** Will anyone ever use this item? Does the cost reflect its value to the library and its users?
2. **Aim and scope.** What is the purpose of the work? Does it meet its stated goals? Is it more suitable for a particular age group, for the layperson, or for the expert? What kind of questions will it answer?
3. **Timeliness.** Is it necessary for a work in this subject field to have the latest information? How is the work updated?
4. **Format.** Is the material arranged logically, whether alphabetically, chronologically, or geographically? Is it easy to use? Is the binding strong enough for heavy use? Is computer response time acceptable? Is the typeface easy to read etc.?
5. **Authority.** What are the reputation and training of the author or editor? What are the sources of the data? Are they cited in the text? What is the publisher's reputation?
6. **Accuracy.** Is the information correct? Is it up to date?

In addition to all these issues when evaluating electronic reference sources, additional concerns must be considered, such as the stability of the site, ease of use, hardware and software reliability and compatibility, archiving, the availability and usefulness of help files, and computer response time. Librarians are generally responsible for selecting reference materials.

However, support staff working in the reference department is in a good position to recommend materials for purchase or access, especially if the staff member answers reference questions. The support staff keep the librarian informed of sources that have potential usefulness or questions for which it was difficult to find answers. The librarian uses this information to help evaluate the reference collection.

### **Types of Reference Materials**

There are several kinds of reference materials. In addition to the library catalog, these include bibliographies or bibliographic guides, dictionaries, directories, encyclopedias, handbooks and manuals, indexes and abstracts, biographical sources, atlases and gazetteers, pamphlets, yearbooks and almanacs, and Internet sites. Following is the brief description of these in accordance to categories:

#### **General Categories**

- 1. *Bibliographies*** are lists of books, periodical articles, and other materials. A bibliography may be a general list of books, like Books in Print, but is more often a list of materials relating to a specific subject. Bibliographies do not necessarily provide information on a subject; rather, they are useful because they direct the reader to appropriate materials.
- 2. *Dictionaries*** consider words and their definitions, spelling, pronunciation, syllabification, and origins. The dictionary may cover the words of a language in general, or it may be limited to special subjects.
- 3. *Directory*** lists names of persons or organizations and pertinent information about them. The directory may include addresses, telephone numbers, the officers of an organization, and a description of the organization.
- 4. *Encyclopedias*** attempt to provide concise information on a variety of topics. The information is usually presented in short articles varying in length from a paragraph to several pages. Encyclopedias are of two types' general encyclopedias covering all subjects or subject specific encyclopedias.
- 5. *Gazetteers and atlases*** are important sources of geographical information. A gazetteer identifies the names of towns, villages, rivers, mountains, lakes, and another geographic feature. Supplemental information such as longitude and latitude or population statistics is usually included. An atlas contains a collection of maps and related information; it may be general or limited to a country or region or may focus on a particular topic. An atlas may include a gazetteer as an index to its maps.



6. **Handbooks and manuals** serve as ready reference information sources in special or delimited areas of knowledge. The entries are usually concise and sometimes include selected bibliographies.

7. **Biographical sources** give information about people. The biographical reference may be limited to people of a particular profession, nationality, gender, or the living or the dead. The information presented about a person varies; it may consist only of brief factual data, or it may be an article several pages long with references to additional information.

8. **Pamphlet collections** contain ephemeral materials, which are not readily available elsewhere. Collections may include free or inexpensive booklets, brochures, leaflets, circulars, maps, newspaper clippings, posters, local government publications, and charts. Pamphlet collections are time consuming to maintain and must be continually weeded of outdated material.

9. **Yearbooks and almanacs** contain miscellaneous facts and statistical information. These tools are useful in locating answers to a variety of ready reference questions. They contain recent statistical information and cover contemporary events. They are concise in their treatment of topics and may serve as supplements to encyclopedias.

10. **Indexes and abstracts** systematically list the contents of specific works so that information in those works can be located. Abstracts have the added benefit of including summaries or descriptions of the works so indexed. Indexes and abstracts are particularly important as sources to locate information in periodicals, serials, and pamphlets.

### **Periodicals and Periodical Indexes**

Periodical literature is an important information source. Periodicals are publications issued on a regular basis more than once a year. Periodical publications are also called a serial publication. These publications are with their own distinctive title, containing a mix of articles, editorials, reviews, columns, short stories, poems, or other short works written by more than one contributor, issued in softcover more than once, generally at regular stated intervals of less than a year, without prior decision as to when the final issue will appear. Although each issue is complete in itself, its relationship to preceding issues is indicated by enumeration, usually issue number and volume number printed on the front cover. Content is controlled by an editor or editorial board. The category includes magazines, sold on subscription and at newsstands; journals, sold on subscription and/or distributed to members of scholarly societies and professional associations; and newsletters, but not proceedings or the other regular publications

of corporate bodies as they relate primarily to meetings. Nor are newspapers formally classified as periodicals--although many libraries store newspapers with magazines and journals. Periodicals are published by scholarly societies, university presses, trade and professional associations, government agencies, commercial publishers, and nonprofit organizations.

Periodicals articles, whether form general interest magazines or scholarly journals, have unique characteristic that make them invaluable for the library collection:

1. Periodicals articles often contain the most current information available on a topic.
2. Periodicals contain information about almost every conceivable topic, often in greater detail than can be found elsewhere.
3. Periodicals are the primary means for communicating original scholarship in all fields of human inquiry.

Each library develops its periodical collection using the same collection development criteria employed in building other collections, such as the circulating book or reference collections. Criteria include the mission of the library, the budget, user needs, collection balance, community standards, and so on. Most libraries attempt to solve the problem of providing access to their periodical collections by subscribing to commercially produced periodical indexes in either printed or electronic formats, or both. Indexing and abstracting tools generally encompass periodicals in a particular subject or field of knowledge.

The currency of periodical indexes is a factor in their usefulness. Abstracting services differ from indexes in important ways. As the name implies, an abstracting index will include a summary or description of each article, varying in length from a sentence or two to a full paragraph. Abstracting services usually focus on the scholarly literature of a particular field. They are more comprehensive than periodical indexes, often indexing as many as a few thousand periodicals from around the world. Because of their research value and expense, they are most usually accessible in academic and special libraries.

### **The Library Catalog**

The library catalog, also known as the PAC (public access catalog) or OPAC (online public access catalog), is the most important reference source in the library, other than the library staff. The catalog is that collection of data which lists, in some consistent way, the resources of a library. Ideally, the

catalog lists all the materials of whatever format the library owns or to which it provides access.

### **The Internet as a Reference Resource**

The Internet defies categorizations as a reference source, but it is surely becoming one of the most important information sources in many libraries. The primary use of the Internet by reference staff is to access remote databases containing desired information. These databases may include full-text journals and newspapers, government documents, consumer information, catalogs of other libraries, periodicals indexes, encyclopedia, and just about any other kind of information one would care to name. Increasingly, libraries are placing their own catalogs on the World Wide Web to improve accessibility to their customers. The development of the Web, with its seamless linking of databases across networks and easy to use point and click interface, has greatly improved the utility of the Internet as an information source.

A necessary adjunct to reference service is the reference collection. Although such collections were once limited to the materials housed within a particular library, online networks have expanded the reference staff's ability to access sources located anywhere in the world. The traditional types of reference sources can generally be categorized as follows: bibliographies, dictionaries, directories, encyclopedias, atlases and gazetteers, handbooks and manuals, biographical sources, pamphlets, yearbooks and almanacs, indexes (including periodical indexes and abstracts), and the library catalog. Automation has greatly improved the utility of reference sources for staff and customers. The Internet is an important source of information. The increasing sophistication of Internet search engines makes finding information on the Internet easier all the time, and navigating the Internet, along with the library catalog, may become the most important reference skill for staff members to master.

### **Self-assessment Questions**

1. What are the purposes of the reference collection?
2. What criteria are considered when selecting reference items?
3. Why are periodicals important for library collections?
4. What are some of the characteristics of periodical indexes?
5. Name several kinds of reference sources and the characteristics of each.

### **Activity**

Visit your nearby university library and prepare the list of important reference sources available there.

### **Recommended readings**

Arthur, G. (1990). Peer Coaching in a University Reference Department. *College & Research Libraries* 51 (July): 367-3673.

Balay, R. Ed. (1996). *Guide to Reference Books*. 11<sup>th</sup> ed. Chicago: American Library Association.

Blazek, R. and Aversa, E. (1194). *The Humanities: A Selective Guide to Information Sources*. 4<sup>th</sup> ed. Englewood, C: Libraries Unlimited.

Dickstein, R. and Greenfield, L. (1997). Using the World Wide Web at the Reference Desk. *Computer in Libraries* 17 (8): 61-66.

Rosen, J. and Snow, C. (1997). Internet Resources for Ready Reference. *College & Research Libraries News* 57 (12): 14-17.

Strauss, D. W. (1988). *Handbook of Business Information: a Guide for Librarians, Students, and Researcher*. Englewood, Co: Libraries Unlimited.

## **UNIT NO. 4**

### **LIBRARY INSTRUCTION**

Library instruction, also called bibliographic instruction (BI), user education and library orientation, consists of instructional programs designed to teach library users how to locate the information they need quickly and effectively. This usually covers the library's system of organizing materials, the structure of the literature of the field, research methodologies appropriate to the academic discipline, and specific resources and finding tools (library catalog, indexes and abstracting services, bibliographic databases, etc.). It prepares individuals to make immediate and lifelong use of information effectively by teaching the concepts and logic of information access and evaluation, and by fostering information independence and critical thinking. Library instruction began in the nineteenth century, with instruction in library use offered by a number of libraries in the United States between 1876 and 1910, and then ramped up in the early twentieth century. In a 1912 American Library Association survey, 57% of respondents offered required or elective library instruction courses. Academic library instruction was for the most part dormant in the library profession from the late 1930s until the early 1960s. Some librarians were still participating in classroom instruction but the literature shows little activity on the topic. Academic library instruction mushroomed during the 1960s and early 1970s.

During the 1970s and 1980s, prior to widespread public use of computers, “library instruction” went far beyond teaching the mechanics of identifying and locating materials in the physical library. It also included critical thinking, active (participatory) learning, and the teaching of concepts, such as controlled vocabularies. It focused on the physical library, as for the most part, that was all that users could try out during instruction. However, the goal was always teaching so that users would transfer what they learned to new situations, reference tools, and environments new to them—that is, they would learn how to learn. Library instruction is evolving to adapt to the changing concepts of information use and understanding. Model programs, in order to be meaningful and effective, should respond to the changing information environment. New methods of library instruction, such as the “Cephalonia method”, reflect changes in “instructional technology” and “education theory”. Information and communication technology literacy (ICT) is an example of a modern approach to library instruction. ICT extends “information literacy” to the use of computer technology in a variety of forms to manipulate, deliver, and receive

information and ideas. A model library instruction program utilizes complementary tools and resources to deliver memorable, interactive instruction. These resources are necessary to engage the attention of contemporary patrons immersed in a media environment.

According to the Presidential Committee on Information Literacy, USA Information literacy is the set of skills a person needs to be "able to recognize when information is needed and the ability to locate, evaluate, and use effectively the needed information. In an academic setting, instruction in information literacy can take on a variety of forms, such as a long class or a project integrated into a course on related subject matter. Literacy competency standards are outlined by the Association of College and Research Libraries. Currently there are debates about whether instruction on how to use library systems is necessary, or if efforts are better spent making systems easier to use so that they require no instruction. Library instruction "occurs in various forms such as formal class settings, small group sessions, one-on-one encounters, written guides and brochures, audiovisual presentations, and computer-assisted instruction (CAI)." Course-related instruction has long been viewed as one of the most effective user education methods. A complication of course-related instruction, however, is the requirement for faculty cooperation and the faculty member's authority to decide when instruction is given and who receives it. In short, librarians have limited control over course-related instruction. These forms of instruction are also very staff-intensive, and this is exacerbated by the high ratio of students to librarians that exists in most institutions. Some university libraries offer specialized instructional sessions for patrons/users. At these sessions the librarian works one-on-one with a user to assist him or her with specific research goals. These sessions are sometimes referred to as a "term paper clinic" or a "research consultation."

Another option for library instruction consists of *one-shot* instruction sessions. This slang term refers to "formal instruction given in a single session, as opposed to instruction extended over two or more sessions." These class meetings are often held just before a term paper is assigned, and the goal of the librarian is to orient the class to the best library sources for use in a term paper. Library instruction can also benefit from the utilization of video games and gaming designed for information literacy. When incorporating design principles from gaming into information literacy instruction, instructional librarians can teach students how to succeed through long, complex, and difficult tasks while still keeping the learning experience engaging.

Information literacy is not just the ability to find information. It consists of knowing:

- the fact that information is needed,
- what information is needed,
- how to describe it,
- what resources to use to retrieve it,
- how to use those resources,
- how to judge the value and validity of what has been found (critical thinking),
- how to organize and integrate the selected information.

Information literacy includes an understanding about what information is and what it is not. Information is not knowledge, per se, nor wisdom either. Information is created, collected, organized, disseminated, and interpreted by human beings, with all their limitations, biases, and inexactitude. Information is important, but it is also changeable and often not 100 percent reliable. The ability to make good judgments about information raises one's literacy quotient and makes information gathering more fruitful.

### **Types of Library Instruction**

A library provides its customers with a variety of aids to library usage, including explanatory signage, printed handouts, audiovisual or online aids, and reference help in general. While all these may have library instruction components, the areas we focus on here are those most specifically identified with the discipline of library instruction, namely, informal or point-of-use instruction and formal instruction.

### **Informal Instruction**

Informal or point-of-use instruction, sometimes called one-on-one instruction, is the kind of informative help usually provided by the reference staff. It is sometimes quite detailed and often referred to as the most effective instruction, but it usually occurs "on demand", at the point at which a client wants or needs to use a library source. Typically, the reference staff helps a user with specific resources useful for the information that user is actively seeking. Point-of-use instruction includes such things as explaining how to use an encyclopedia's index, or the gazetteer of an atlas, or the scale of a map, or how to find the online thesaurus of a periodical index, or a certain statistic in a particular reference book or website. Of course, not every reference question calls for library instruction, but reference staff should be

ready and able to do one-on-one library instruction at the drop of a hat, especially in school and academic libraries.

### **Formal Instruction**

Formal instruction is the other main aspect of user education. Formal instruction includes library tours and orientations for groups, formal classroom instruction within a school or academic institution, and workshops or tutorials for groups or individuals. Formal instruction can range from teaching children how to check out a book to teaching an advanced graduate level research seminar, and everything in between. In many school libraries and special libraries, support staff may be responsible for at least some formal instruction. Indeed, there are many school and special libraries in which the paraprofessional is the sole library staff member and must do everything. On the other hand, in most academic libraries, librarians normally conduct the formal library instruction activities.

### **Offsite Instruction and Distance Learning**

Library instruction may, at times, be included in telephone or e-mail reference and even as part of correspondence. An offsite client should be given as full an answer as is possible within the constraints of time, the needs of those who are not physically present, and as library policy may be. Sometimes, as with some onsite requests, offsite requests for service are difficult or impossible to satisfy. Unreasonable requests can sometimes be turned into a learning experience for the offsite user. With patience and enough time, the staff member can conduct a reference interview that gives a somewhat befuddled inquirer important clues about why the proposed question is either impossible to answer or involves much more work, time, and/or thought than the inquirer suspects. Library policy should also specify parameters to address the needs of outside groups who ask for instruction, which can range from a 15-minute tour to a formal classroom instruction session. Local schools, college and academic libraries should be made aware of these policies; an unannounced walk around tour of their libraries.

Technology, especially the Internet and its web offshoots, has made distance education possible for many underserved populations to learn online. The geographically or economically isolated, or those with full or erratic work schedules, can take for credit courses at both the undergraduate and graduate levels. Termed “distance education”, this can mean anything from a student obtaining textual material via an e-mail account to geographically remote students participating electronically in “live” class discussions via camera and



audio hookups. Some institutions grant credentials and academic degrees for such work. Most academic libraries cooperate with distance education programs by making these students welcome to a point at their libraries. Good distance learning institutions provide the best possible library service they can to their students, using various combinations of the Internet, interlibrary loan, fax machines, delivery services, and the mail to deliver needed research materials. A good web site for library instruction can help such students. Some distance education programs have campus librarians perform searches, identify relevant article, and send lists or even copies of materials directly to the students.

### **Planning of Library Instruction Program**

Planning is an important part of the ongoing process of library instruction. The extent and success of the library instruction program may be limited by the local situation. Under adverse conditions, such as serious lack of staff, or lack of administrative or faculty support, the program should be aimed at achieving a number of limited goals satisfactorily while a well-planned, long-term effort of publicity, personal contact, and gathering of evidence looks towards the future. Following are the steps/outline for successful planning library instruction program:

1. Prepare a need assessment chart.
2. Determine goals and objectives.
3. Publicize the program.
4. Prepare instructional materials.
5. Prepare instructional staff.
6. Prepare an instructional center or room.
7. Implement the Program.

### **Evaluation of Library Instruction Program**

One-way instruction program gauge their success or lack of it is through a process of evaluation. In academic programs, written student survey forms and faculty survey forms, pre and posttests, and even formal focus groups are among the tools use to evaluate a program. Records of evaluation activities should be kept for several years because they are often requested during regional accreditations of institutes. At many institutions, evaluation includes reviewing the instructional performance of individuals. This is done by a departmental supervisor but, especially where librarians are considered faculty, can include review by one's peers.

At the end in a conclusion library instruction includes a variety of processes and materials through which the library conveys to its users the ways and methods by which they may acquire needed information. Library instruction includes such things as informative signage and printed materials. Primarily, however, it includes the instruction of a user or groups of users by library staff. Library staff members instruct users in several ways. At the reference desk, one-on-one contact allows the reference staff to explain the use of individual library tools as they become relevant to the client's needs (informal or point-of-use instruction). In a more formal group setting, library staff give presentations on library search strategies and on the use of specific tools or classes of tools pertinent to the group's needs, whether a term paper or other classroom assignment, personal interest, or a professional informational need (formal instruction).

A successful library instruction program will be based on the actual needs of library users. Good planning; solid, well-articulated and achievable goals; and a coordinated effort to publicize library instruction services and programs are necessary components.

### **Self-assessment Questions**

1. What are the basic elements of information literacy?
2. Discuss the major kinds of library instruction.
3. Name five kinds of library produced materials that can be used in library instruction program.
4. How can we evaluate the library instruction program?

### **Activity**

Students are required to set up a library instruction program at an academic library, especially a university library and discuss with the tutor.

### **Recommended readings**

Branch, K. and Gilchrist, D. (1996). Library Instruction and Information Literacy in Community and Technical Colleges. *RQ* 35 (summer), 476-483.

Brottman, M. and Loe, M. Eds. (1990). *Library Instruction Handbook*. Englewood, CO: Libraries Unlimited.

Cushman, K. (1996). Information Literacy and the Essential School Library. *Ohio Media Spectrum* 48 (Spring), 23-26.

Dudley, M. (1983). A Philosophy of Library Instruction. *Research Strategies* 1 (2), 59-64.

Fenske, R. F. and Clark, S. E. (1995). Incorporating Library Instruction in a General Education Program for College Freshmen. *Reference Services Review* 23 (3), 69-74.

Johnson, D. A. and Eisenbert, M. B. (1996). Computer Literacy and Information Literacy: A Natural Combination. *Emergency Librarian* 23 (May-June), 12-16.

Julien, H. (1998). User Education in New Zealand Tertiary Libraries: An International Comparison. *Journal of Academic Librarianship* 24 (4), 304-313.

Martin, L. M. Ed. (1995). *Library Instruction Revisited: Bibliographic Instruction Comes of Age*. New York: Haworth Press.

Roberts, A. F. and Blandy, S. G. (1989). *Library Instruction for Librarians*. 2<sup>nd</sup> Rev. Ed. Englewood, CO: Libraries Unlimited.

## UNIT NO. 5

### INTERLIBRARY LOAN AND DOCUMENT DELIVERY

Interlibrary Loan (ILL) is a term which sometimes called inter loan, inter lending, document delivery, document supply, or interlibrary services, abbreviated ILS) is a service whereby a patron/user of one library can borrow books, magazines, periodicals, music, etc. and/or receive photocopies of documents that are owned by another library. The user makes a request with their home library; which, acting as an intermediary, identifies libraries with the desired item, places the request, receives the item, makes it available to the user, as well as arranges for its return. The lending library usually sets a due date and overdue fees of the material borrowed. Although books and journal articles are the most frequently requested items, some libraries will lend audio recordings, video recordings, maps, sheet music, and microforms of all kinds. In some cases, nominal fees accompany the interlibrary loan services.

The term *document delivery* may also be used for a related service, namely the supply of journal articles and other copies on a personalized basis, whether these come from other libraries or direct from the publishers. The end user is usually responsible for any fees, such as costs for postage or photocopying. Commercial document delivery services will borrow on behalf of any customer willing to pay for their rates. This is a modern library process by which a borrower in one library obtains the use of books, periodical articles, or other library materials from another, sometimes distant, library. In this process at its simplest, one branch of a large public library might borrow a book from the central library for the benefit of a requesting borrower. A more complex transaction might be a researcher requesting a filmed or paper copy of a medieval manuscript from an overseas library. Philosophically, interlibrary loan stems from the premise that no library can be completely self-sufficient in meeting the needs of its customers. It is a dictate of modern librarianship that improving access to information enhances the library's mission. There will always be overworked librarians and underfunded libraries, but the effort to meet the customer's need should be made whenever possible. An active interlibrary loan program is a significant commitment of library resources. Each library must make decisions about which services to emphasize based on its mission and priorities. Interlibrary loan requires staff time for patron/user contact, verification, searching, communicating, expediting, record keeping, retrieval, and returning materials. There are also costs involving forms, shipping,

computer or telecommunications, packaging, furniture and space, and billing costs. At the same time, interlibrary cooperation and document delivery may save the library money. Rarely used items can be borrowed rather than bought, or purchase “just in time” rather than subscribe to “just in case.” Interlibrary loan removes the limitations of borrower location and is thus inherently democratic.

### **Automated Interlibrary Loan**

Automation spurred tremendous changes in interlibrary loan in the decade of the 1990s. As with all computer related advances, automation has simplified some aspects of interlibrary loan while making other parts more complex. It has especially raised customer expectations. There are sophisticated personal computer users who are used to downloading entire articles (full-text retrieval) from certain commercial databases. Automation has accelerated and, in many ways, simplified the loan process. Using large bibliographic as well as full-text databases such as OCLC LISTA, EMERALD, JSTOR etc. for instance, verification of bibliographic information is generally quick and easy. The access to full-text databases is not a complex process if it is provided through interlibrary loan facility. Knowing who owns the desired material (holdings information) is, of course, of primary interest in interlibrary loan. After quickly creating a list of libraries holding the item online, the searcher can select which libraries to contact and then prioritize them (for example, by geographical closeness, best service, or lowest fee). The system contacts the first library, which either accepts or refuses the loan. If refused, the request moves on to the next target library on the list, then the next, and so on until the loan is achieved.

### **Non-automated Interlibrary Loan**

This is a traditional kind of interlibrary loan process and vary in complexity according to type and size of library, as well as the nature of the material lent. In smaller library systems, a simple telephone call to another branch or the public library in the next community might be all that is required. In larger libraries and longer distances require more formal procedures. Request can be made through standard “Interlibrary Loan Form”. This standardized form has specific advantages such as verification, and citation, time limit, responsibility, accuracy etc. The standard form also contains check-off boxes to indicate compliance with fair use of copyright guidelines and restrictions.

### **Verification, Borrowing and Lending**

The borrowing library staff must be certain that the material sought for interlibrary loan or document delivery is not available in the collection. If the material is not held at the local library, staff will verify the actual existence of material described in requesting library as described by the user. Typically, this is done by consulting an online union catalog.

The next step after verification is placing the order, which can be placed through e-mail, telephone, use of social media platform or fax machine. Once the request is received at the lending library or document supplier, the process goes on. The requesting library as per policy of ILL agreement deliver the requesting material to borrowing library/institute. The borrowing library should acknowledge the loan.

### **Delivery System and Money Matters etc.**

The requested material can be delivered between libraries or institutions, in several ways. The most appropriate way is Postal service (Pakistan Post), private courier services (TCS, OCS, Leopard etc.). The access to material can be provided through network/internet. The use of ICT currently changed the delivery system and interlibrary loan has entered a new stage. The documents delivery mostly dependent on technology and less dependence on the postal mails for interlibrary loan and document delivery.

Charging for services rendered, photocopying, replacement of lost material is a policy matter in the interlibrary loan process. This process involves some direct charges such as database use charges, postage or insurance, royalty fees, and service charges are often passed on to the user. There is no profit at the part of both borrowing library or lending library. Libraries involved in the interlibrary loan agreement should formulate policies on collection of fees and other charges at local level.

### **Working Space Consideration**

The interlibrary loan process is not a laptop operation. This process included many ongoing activities and needs proper space or section in the library. Besides adequate filing space for both incoming and outgoing requests, statistics, user billing files and rubber stamps for copyright statements, usage restrictions, postal postage etc. There should be adequate space for the storage of packaging materials. There must be space for both incoming and outgoing materials, both in the ILL area and at the point of loan, usually at or near the circulation desk. A dedicated internet connection, telephone, scanner, online database services, computer terminals, printer etc. are

required for contacting with users and borrowing and lending libraries and delivery of documents.

### **Administration of Interlibrary Loan Section**

Interlibrary loan is usually supervised by a senior professional librarian. Library support staff usually perform most functions such as verification, communication, scanning, packing, forwarding, filing, record keeping and document delivery.

Interlibrary loan work can be quite hectic. It needs qualified staff having the qualities of accuracy, good judgment, honesty, openness, patience, good humor, communication skills and computer literacy. Occasionally the borrower's demand for speed is unreasonable, or even unattainable. In such cases, a written policy and patient good will are very useful things to have. Good interpersonal skills are a great help in obtaining correct information from a confused borrower or a flustered staff member in a cooperating library or from the local postmaster.

Staffing of ILL activities can vary from the occasional extra duty of one staff member to a full-time department. This depends on the volume of requests received from both local readers and other libraries. In a high-volume situation, an ILL department may split into two groups, one to fill requests from other libraries and another to handle customer request for outside loans. Scheduling of library staff time, therefore, varies from institution to institution. In understaffed libraries, interlibrary loan may have to take second or third or fourth place to the pressing needs of other library services. Keeping and using the ILL records and statistics is very important administration duty. In any modern institution, records and statistics are useful in determining appropriate staffing levels for the operation, share of the budget, formation of goals and objectives, and other administration decisions. Today's libraries use statistics the same way, as well as to measure the level of service to the community of which they are to serve.

### **Copyright legislation and ILL**

Copyright legislation can be interpreted as requiring that records be kept regarding photocopies made and received. Today in the age of electronic publishing it is one of the most difficult areas to understand in library science. It is better to play it safe. Interlibrary loan and document delivery is one of the areas in the library most affected by this legislation, because much of what is reproduced from books, journals, websites, microform, software, magnetic tape, and other materials is protected by copyright. Copies of an

article form a journal, a chapter from a book, or other materials of a certain length can be reproduced for scholarly or other educational purposes, including interlibrary loan. It is recommended that notices of the customer's responsibility regarding copyright violation are to be posted by all photocopy machines used by customers and near ILL units, as well as on ILL transaction forms and on copies loaned through interlibrary loan.

### **Conclusion**

Interlibrary loan and document delivery are important adjuncts to the basic library goal of access to information. Providing information not locally available via interlibrary cooperation and commercial provider is an increasingly important way that libraries supplement their collections to meet the needs of their customers.

Although local procedures differ, established protocols for automated ILL transactions and standardized forms for manual ILL transactions help provide the necessary qualities of consistency, accountability, and efficiency that make ILL practicable. Obtaining photocopies of articles or other reproduction generally falls under the copyright law and before copying to prevent damage, and procedures necessary to guarantee that fair use limits are not exceeded. Current trends in the future ILL services we see are greater customer-initiated ILL and document delivery, reducing the amount of staff time necessary to process requests, and increasing use of the Internet to transmit interlibrary loans.

### **Self-assessment Questions**

1. How interlibrary loan is important in the provision of access to information? Discuss.
2. Enlist the duties of ILL staff Keeping in view the working space consideration, time management and copyright law.
3. Discuss the future trends of ILL services.

### **Activity**

Visit a large academic library and discuss with the chief librarian about the provision of ILL services to any partner academic library.

### **Recommended readings**

Evans, G. E., Amodeo, J. A., & Carter, T. L. (2005). *Introduction to library public services* (6<sup>th</sup> ed.). Greenwood Village, Colorado: Libraries Unlimited.



Boucher, V. (1997). *Interlibrary loan practice handbook*. 2<sup>nd</sup> ed. Chicago: American Library Association.

Guidelines for the Loan of Rare and Unique Materials (1994). Available at: <http://www.ala.org/acrl/guides/loanrare.html>.

Interlibrary Loan Packaging and Wrapping Guidelines (1997). Available at: <http://www.ala.org/rusa/mopss/illpack.html>.

## **UNIT NO. 6**

### **CIRCULATION AND RESERVE SERVICES**

#### **Circulation Service**

Circulation of library material is an important function of a library. Without circulation service, library is like a dump house. The circulation services unit of a library fills two important roles. First and perhaps most obvious role is that of circulation control, Second and equally important role of circulation service is that of public relations. Circulation service is the foundation upon which the whole structure of the modern library rests. The use of modern reference tools, instruction and guidance in the use of the library, and readers' advisory are unimportant if library users cannot obtain the materials they want. Circulation control activity of the library is which important activity where library staff through personal contact and a system of records, supplies the reader with the books wanted. Circulation routines are established, records maintained, and personnel employed and trained to make information efficiently available to borrowers or to explain why requested items cannot be immediately supplied. In public relations often the first contact people make with a library is at the circulation desk, the center of library activity for most customers.

The library must properly train circulation staff to prepare them to give effective and efficient service. Staff members should be imbued with the service ideal of the library and taught the philosophy behind the routines they perform. In this way they may be expected to treat each user an individual whose request is important and who is entitled to the full measure of service consistent with library policy.

#### **Philosophy of Circulation**

The circulation philosophy of a library derives from the library's mission and goals or from its governing body. Commonly, this philosophy involves guaranteeing to a library's clientele equal and fair access to the library's collection. Today this philosophy also includes a desire to deliver material into the hands of the users. This desire to provide access to library material expressed through the actions of staff and the existence of appropriate procedures. These democratic ideals were not always the norm. For centuries libraries were more the preservers and guardians of knowledge than the purveyors of it. Until the invention of movable type in the fifteenth century, books were both scarce and valuable, and few people were literate. Libraries, whether government collections; religious collections attached to temples,

churches, or monasteries; private collections; or academic collections, had very restrictive circulation policies. The generous circulation privileges we know today are of recent vintage. Indeed, the whole notion of a publicly supported lending library, whose purpose is to make books available to all, is a relatively new idea.

In the early 1800s, librarians argued over the question of open access to the bookshelves. Free access to the books first was conceived as a privilege for the scholarly researcher. Later, people advocated access to the collections as a basis of service to the needs of working people. Supporters of closed stacks maintained that unfettered access would lead to disorder on the shelves and decimation of the collection through theft. They also argued that the masses would be unable to use the library effectively and that the presence of intelligent desk attendants would be more helpful than stack access. Recreational reading began to take on importance in the late nineteenth and early twentieth centuries. Emphasis on the use of books gradually increased and it was understood, even in the nineteenth century, that the card catalog did not provide sufficient access to the collection for most patrons. In response, library staff developed annotated books lists, subject lists, bulletins of recent acquisitions, and printed daily lists on subjects of current interest. Today, circulation staff find themselves with new formats aside from books, such as videos, CDs, laser disks, cassettes, online web portals, computer software, social media sites, RSS feeds, OPACs and google. Libraries determine circulation policies and routines with the goal of providing maximum access to the materials. The circulation staff member sees his or her work through this ideal as it is expressed in library policies and individual attitudes. As the staff member becomes familiar with the rules and regulations, the policy of the library with regard to their role will be better understood. The more fully the circulation assistants understand the underlying philosophy of the institution, the more accurately they can determine which circumstances call for exceptions to the rules.

### **Customer Relations**

Almost everything done in a library is an act of customer relations. Anything that affects the patron's attitude toward the library, negatively or positively, is part of customer relations. How long it takes to catalog books, how staff answer the telephone, the accuracy of the reshelving process, the inflection in one's voice when answering a question, the presence and quality of signage, and the "warmth" or atmosphere of a library are only a few examples of things that have an impact on customer relations.

There are philosophical and practical reasons for a library to be concerned about customer relations. Good customer relations will stem from the delivery of quality service. Conversely, bad customer relations is a sign that the service philosophy of the library is defective in vision, execution, or both. From a practical standpoint, good customer relations is vital for the stability of a library's financial base. Whether public, academic, special, or school, a library must depend on a parent agency for funding. Because of its central role in providing service to library users, a large share of the responsibility for good customer relations rests on the circulation staff. Increasingly in some libraries, working with culturally diverse groups presents a challenge to staff. There is a growing need to understand cultural differences and the needs of non-English speakers to provide good-quality service.

There are, however, a small number of library users who do not respond to courteous treatment and efficient service. These customers are sometimes categorized as "problem patrons." Nevertheless, library staff must make reasonable attempts to satisfy every customer's library needs, even those of problem patrons. In academic libraries the principal problems reported by borrowers were lack of information about materials they wanted to borrow and could not find and lack of notification about overdue materials. Circulation limits on reserve items and restrictions on renewals were other problems, as well as dissatisfaction with the tediousness of manual charging systems and strict application of circulation rules. The most frequent complaints of public library users were about insufficient numbers of desired titles and not being notified about their overdue materials. Borrowers were also unhappy about short loan periods, limited renewals, fines, and the use of collection agencies. The most frequent complaint of students using school libraries was that materials they wanted were not available. Students also wanted to be notified about their overdue materials, and they disliked receiving overdue notices for materials they believed they had returned.

Circulation staff should be aware of the most frequent complaints made by users of their library and should pass complaints on to their supervisors. Appropriate responses to complaints should be taught to all loan desk workers and the responses should be made with courtesy and tact.

### **Circulation Control Systems**

A circulation control system allows library staff to determine, at a minimum, the location of each book in the collection and to administer the circulation policy fairly. Each system has unique characteristics that determine its value to a library. Following seven are the traits and characteristics which occur in

varying degrees in all circulation systems when a system is studied, the importance of each characteristic for a particular library's operation must be considered.

**Trait One:** the system must be easy for borrowers to use and for library personnel to operate. Simplicity and ease of use might be the most important qualities of any circulation control system.

**Trait Two:** the system must be reliable. It must accurately record transactions with little opportunity for use or staff error.

**Trait Three:** the system should allow library staff to identify the borrower, the material borrowed, and the date material is due.

**Trait Four:** the system must provide a record of overdue materials.

**Trait Five:** the system should provide easy and accurate retrieval of requested materials when they are checked in. Borrowers often request materials already on loan. The borrower should be able to request notification when material is returned and available for further use. The system must allow for returned materials to be checked against hold requests and held for the next borrower.

**Trait Six:** the system should allow easy retrieval of statistics required by the library staff as well as patrons.

**Trait Seven:** the system must be cost effective.

### **Selection of a Circulation Control System**

Selecting a circulation control system is one of the first decisions made when establishing a library. The system selected affects how materials are prepared for use. The method of circulating books affects other library operations as well. Careful study is needed to select a circulation system. Following four considerations are most common in selection of circulation system:

**Consideration First:** the first consideration is the quality of service given to the customer/user. The circulation system must be compatible with the needs of the library's users and the overall purpose of the library.

**Consideration Second:** the second factor is size of the library collection and the expected volume of circulation. If the library has a huge volume of circulation, it must be needed automated system instead of a small volume of circulation library.

**Consideration Third:** this is the cost of the system. Following three elements pertain here:

1. The initial cost of processing and equipment,
2. The cost of ongoing processing equipment maintenance, and supplies,
3. The cost of personnel needed to operate the system.

**Consideration Fourth:** this is the identification of type of customer/user the library serves and the kind and amount of borrower participant built into the system.

## **Some Circulation Control Systems**

### **1. Automated Circulation Control System**

Automated circulation systems generally require little or no patron participation. Each library user is assigned a unique identification number that appears as a bar code. Staff also apply a unique bar code number to each item in the library's collection. The item's bar code number is linked to the item's bibliographic record in the online catalog. To charge out an item, the customer presents the bar-coded identification card to the circulation attendant together with the material to charge out. The computer automatically retrieves the patron record and checks the borrower's eligibility to borrow materials. To check in returned material, the staff member places the system in the discharge, or check-in, mode. When the system reads the bar code on the item it clears the record from the computer's memory unless the item is overdue information. Following is a list of tasks most computerized circulation systems can be programmed to perform. If a computer system/library automated system performs these tasks a library can improve service and, perhaps, even save money:

1. Identifies delinquent borrowers who have overdue materials and/or owe fines,
2. Displays the reason for the delinquency,
3. Alerts staff to lost or stolen identification cards when one is presented,
4. Indicates when a reserve (hold) has been placed on an item.
5. Displays all items currently checked out to a borrower and eliminates any record of past circulation activity.
6. Allows placement and notification of reserves (holds),
7. Calculates fines and fees for overdue items,
8. Prints recall notices,
9. Automatically prints overdue and fee statements,
10. Indicates whether a particular item is already checked out or is temporarily unavailable, for example, at the bindery,
11. Records and prints a variety of statistical information concerning collection use and circulation activities.

Automated systems are flexible, and a library may tailor the functions cited earlier to meet its specific needs. The only way to understand an automated circulation system is to see one in operation or, better yet, use one in person.

## **2. Manual Circulation Control System**

In most of the libraries computerized circulation systems are now the norm and widely used by library staff. We limit here our discussion of manual circulation system and describe only two of these. With the increase in the number of readers using libraries, it became necessary to devise some method of identifying both the book and the borrower.

Thus, the two card system, one card for the book and one for the borrower came into existence. First, identification cards were used, which were later substituted by borrower's card on which all book transactions were entered. Of the two card systems, two systems, namely the Browne and the Newark are popular and widely used even today in libraries, particularly in Pakistan.

**Browne System:** Towards the end of the 19th century, Nina E. Browne devised a charging system which used pockets or envelopes for each borrower instead of cards. When a book was to be charged, the book-card was removed and placed in the borrower's pocket which bore the borrower's name, address and registration number. These borrower's pockets, each containing one book card were then filed under the date either by call number, author or title of the book under circulation. This system involved only a single operation to make books available. Although considered to be notable advance over the temporary and permanent slip system, it had one shortcoming there was no permanent record of the loan.

**Newark System:** Around the turn of the century (about 1900) a new system came into use, which utilized the borrower's card and book card to the best advantage. This new system was adapted by the Newark (New Jersey) Public Library, and soon became popular. The simplicity and flexibility of this system made it adaptable to both small and large public libraries. Its positive attributes include accurate files, conveniently located at the circulation desk by patron's name, due date and call number. It can also generate accurate statistical reports and accommodate different loan periods. The main disadvantages are the labor intensive nature of the operations: It set the stage for associating patron information to items through the loan transaction and the eventual use of transaction numbers.

### **Stack Maintenance**

Maintaining an orderly arrangement of library materials is an important function generally assigned to circulation. A library must have an accurate

and efficient shelving operation or good library service is impossible. Backlogs of un-shelved materials cause delays in service and require staff time to locate material. Mis-shelved items are as good as lost until they are somehow noticed and re-shelved correctly. When closed stacks were the rule and only library staff had access to them, maintaining an accurate arrangement was at least possible. But with the advent of the public library and the gradual elimination of closed stacks in favor of open stacks for patron browsing, maintaining orderly collections of materials has become a constant battle waged by the circulation department.

The most common way in which libraries first sort their collections is by format. Books, periodicals, audiovisual media, government documents, pamphlets, and so forth are grouped together by format. Books are the most traditional item in most collections and are housed on shelves in book stacks and arranged by classification number. Some books, such as rare or antiquarian books, special collections materials, and oversized volumes, require special handling, but these too, will have a classification or accession number to allow orderly shelving. Although support staff or librarians will, in all but the smallest libraries, usually do-little shelving, they must know enough to train the clerical and student assistants to handle all phases of the shelving operation. Classification systems are the most appropriate device of stack maintenance and orderly shelving. There are various classification schemes used in libraries of world for shelving but two of them are popular classification systems in use in United States are DDC and LOC system. But in rest of the world DDC and UDC are most popular classification systems.

### **Preservation and Security**

Of all the departments of a library, circulation probably has the greatest impact on the condition, and often the survival, of library materials. Proper procedures for check-in and check-out as well as shelving, selection for repair, and other circulation work will prevent much damage. Good handling practice among circulation staff prevents damage by those who most often handle library materials, that is those very staff members.

Circulation staff members also set an example for the handling of books and materials by library customers. If staff member checking out a book treats it roughly, borrowers will, consciously or unconsciously, learn to devalue the book and treat it in a similar manner. Staff training and the foundation of good book handling habits are the best way to begin to improve handling practice by both staff and library patrons. All new employees need specific instruction in preventive preservation Instruction should be continuous over a



period of time, including supervision, checking, and reinforcement. Customer education is another means to avoid damage to library materials. Besides library staff setting a good example, such things as providing thin, non-harmful bookmarks, positing signs that inform patrons of situations dangerous to library materials and having well-publicized information about library problems may all be of help.

### **Security and Circulation's Role in Security**

The circulation staff of a library is often responsible for much of the security of the library building and its collections. This is so for several following reasons:

1. The circulation area is often located near entrance and exit doors, and circulation staff are likely to be the first to become aware of security problems.
2. Circulation staff are often more familiar with the building than other library personnel.
3. Circulation departments are staffed all the hours the library is open.

Responsibility for library security generally falls into two categories: (1) notifying the proper authorities about crimes or transgressions, or facility problems; and (2) assuming responsibility for the security of the building and its contents, especially at opening and closing times. Circulation staff usually have the responsibility of notifying appropriate behavior by customers. The staff may also be required to contact medical personnel in the event of emergencies. All libraries should have written procedures for dealing with security and medical emergencies and all staff should be thoroughly familiar with them. Responsibility for building security includes opening the library in the morning and preparing it for use (turning on the lights, the catalog terminals, the copy machines, and the microcomputer workstations; opening doors; unlocking the cash box). Security also involves making sure the building is empty of people at closing time, turning the equipment off, and locking all the doors. This is extremely important operation and evening personnel must be well versed in closing procedures to ensure that uninvited guests do not remain and that the building is secure against unauthorized entry. Both opening and closing procedures should be in writing and personnel performing these functions should be thoroughly trained in the routines.

## **Administration of Circulation Section**

Despite the differences in size of operations and type of library, in most libraries the duties of administering circulation functions are basically the same. The librarian or paraprofessional in charge selects and organizes the staff; is responsible for the details of supervision, instruction, and development; and assigns responsibility for the work.

In small libraries the librarian often combines the administrative duties of the circulation function with those of the rest of the library. In larger libraries a department head, often a paraprofessional, usually discharges these administrative duties. The administrator is an intermediary between the librarian and the staff and often between the library and the public. In large libraries this individual may be accountable to an assistant librarian or a division chief. In the eye of the users, the administrator represents the library and the service that makes materials available. As member of the general staff, the administrator must keep in close touch with all activities in any way related to the department and must see that rivalry with the other library departments does not exist. The administrator must introduce into actual practice the policies and procedures determined by the chief librarian, the school board, the board of trustees, or other authorities.

## **Reserve Services**

### **Role and Philosophy of Reserve Services**

Reserve rooms and reserve collections are usually found in academic libraries and sometimes in school libraries and are often the busiest service points in the library. The philosophy of the reserve room is to enhance the teaching process by enabling teachers and faculty to temporarily supplement library collections in support of their courses. Reserve services do this by enabling teachers to place materials, or copies of materials, on restricted loan for a limited period. Electronic reserve systems permit the scanning of document images into a database and their retrieval by students.

Reserve service guarantees that assigned material will be available for students to use when it is needed. The service also allows teachers to place on reserve or make available electronically, within limits, multiple copies of copyrighted materials. This assures their availability in sufficient quantity when they are needed. Reserve rooms are also used to protect high-risk items, that is, material that is likely to be mutilated or stolen if placed on the open shelves.

Customers and staff are sometimes critical about various aspects of reserve service. Students complain that material is not put on reserve fast enough,

that service is poor and waiting times too long. Teacher also protest about the time it takes to process assigned material and about the amount of work they must do before material is placed on reserve.

### **Arrangement and Storage of Reserve Materials**

Generally, reserve materials are removed from the circulating collection by library staff or teachers or, in the case of materials owned by the instructors, are delivered to the library and placed in a special room or are within the library where access is controlled. Activity around the reserve area is heavy, and the location of the service should be considered carefully. The room must be easy to find and traffic to and from the area should not interfere with other library operations. Locating the reserve room outside of the library building has been tried and found wanting due to inconvenience for users and staff. The primary criterion for arranging material in the reserve area is to enable staff to locate and easily retrieve the items requested by students. Staff generally house unclassified materials and professors' personal copies on bookshelves arranged by course number or the instructor's name. sometimes unclassified materials are assigned an accession number and arranged numerically. Classified materials may be grouped with other material for a course or filed separately by call number. Housing for photocopies and other loose materials is problematic. Some libraries punch holes in photocopied materials and place them in binders, some staple the pages together and place them in cardboard boxes or manila folders, and others arrange them in file cabinets. Media too, can be housed with the rest of the material for a course or remain in special media housing. Scanned images are indexed in the database so files for particular professors or courses can be easily retrieved, generally by professor's name, title, author, and course number.

### **Access to Course Reserve**

Making reserve readings accessible requires several different steps. The first step is to persuade instructors to submit their reserve lists in a timely manner. The greatest amount of processing work, which is time consuming, comes at the beginning of the semester or academic term. Once materials are processed, access depends on students knowing what items are on reserve. Students and instructors must know which materials are removed from public access to the reserve room, and students need to know what materials are placed on reserve by their instructors.

Libraries with automated reserve systems have an answer to some of these problems. Many integrated online systems have reserve modules. Reserve

holdings may be found by searching for the teacher's or faculty member's name, the course name or number, the author, or the title. Digital reserve collections, accessed via the Web, are available anywhere a student has a computer, network connection, and password. This makes digital reserve item more accessible than traditional collections and extremely important for students taking classes through distance education.

Non-automated libraries must depend for access on the quality of the printed or written records developed by the reserve staff. Staff should mark the records for library materials placed on reserve in the public catalog to inform users of the change, but marking every card is often impossible. Comprehensive lists of items on reserve are located at the reserve desk itself for public consultation. It is the reserve supervisor's responsibility to monitor the demand for library materials placed on reserve. Because of their reference value or popularity, access to some books should not be restricted by placing them on reserve.

### **Circulation of Reserve Items**

Whether a library uses a manual or automated system, the process of circulating reserve items is more complex than that performed at the circulation desk. There are several characteristics of reserve circulation that make this so: the processing required to prepare items for circulation, varying loan periods and fine schedules, the number of non-library and non-book materials circulated, and the ever-changing composition of the collection.

**Manual Circulation:** when instructors deliver items to the reserve area, staff must first process them for reserve circulation. Each item, whether book, photocopy, teacher's personal copy, or other type of material, must be identified with the following information: instructor's name, course number, circulation period, and any use limitations applicable, such as "Reserve Book Room use only" or "Library use only."

**Automated Circulation:** effective automated reserve books systems are not as prevalent as automated circulation systems. This is because it is difficult to program the system to handle the large number of different loan periods and item types. As items are added to the reserve collection, they are again identified by course instructor, and circulation period. Staff enter this information into the system and link it to the item's existing barcode, or to a new dumb bar code, which they attach to the item itself, or to a book card created for the item.

### **Administration, Security and Preservation of Reserve Material**

On most library organization charts the reserve room appears under the authority of the circulation section. Most commonly, the circulation supervisor or a paraprofessional reporting to the head of circulation supervises the service. The individual in charge of reserve must be experienced, as many problems arise requiring mature judgment, tact, and well-developed interpersonal skills. The reserve supervisor selects, trains, and supervises the work of the reserve staff, most of whom are students. The supervisor must make sure the staff have work to do during slack periods, but that duties do not interfere with service delivery. Punctuality is a necessity. Students must arrive on time to replace others leaving for class. Service will suffer if there are not enough personnel to staff the desk when help is needed. In selecting personnel for the reserve book room, administrators consider the unique characteristics of the service. As a first criterion, reserve staff must have good interpersonal skills. The ability to work nights and weekends is also necessary because the reserve book room is normally open for service whenever the library is open. To schedule staff effectively, the administrator must be familiar with the use patterns of reserve materials.

Because of their high use, reserve materials suffer a great deal of wear and tear. It is important for staff to handle reserve items carefully to help prolong their life and value as instructional aids. Training staff in the proper techniques of handling the various materials placed on reserve will help prevent damage. Media should be stored in appropriate housing. Binders or folders help protect photocopied or other loose materials from the damage that accompanies high use. Administrator train staff to pay special attention to security and preservation of teacher owned materials in the reserve collection. Personal materials such as books, videos, and other items may be easily stolen, so care must be taken to verify and record borrower identification information before the materials circulate. As the practice of digitizing reserve materials becomes more common, the concerns of reserve staff for the preservation and security of physical items will necessarily decrease.

### **Conclusion**

The circulation section is the workhorse of the library. Circulation staff work a greater variety of hours and do a wider assortment of jobs than other library employees. Staff providing circulation services find themselves in greater direct customer contact in a wider variety of situations than staff who work in

circulation will find the work challenging, diversified, interpersonal, and rarely dull. Reserve services are viewed by many faculties and teachers as a valuable adjunct to their teaching. It provides them with a way to supplement the library collections in direct support for their classes. Electronic reserves greatly increase access to reserve readings once a library adopts a policy that conforms to the current interpretation of copyright law and an increase in electronic reserves is a trend we expect to see continue. However, reserve service is costly to maintain and often underutilized. These arguments suggest that libraries facing personnel shortages or space limitations should consider carefully the value of continuing full reserve service before cutting more essential services and resources.

### **Self-assessment Questions**

1. What are two important roles of circulation services?
2. Describe the most common circulation systems in use today.
3. What two general principles govern the arrangement of materials in most libraries?
4. What is the role of reserve services in academic libraries?
5. How do library staff provide access to materials placed on reserve?
6. How do reserve staff participate in library security and preservation? How are materials protected from wear and tear?

### **Activity**

Visit any university library and study its Circulation Section. After consulting the circulation staff prepare a circulation and reserve materials plan.

### **Recommended readings**

Eppard, P. B. (1986). "The Rental Library in Twentieth Century America." *Journal of Library History, Philosophy, and Contemporary Librarianship* 21 (Winter): 240-52.

Intner, S. (1987). *Circulation Policy in Academic, Public, and School Libraries*. New York: Greenwood.

Seaman, S. (1996). "Copyright and Fair Use in an Electronic Reserves System." *Journal of Interlibrary Loan, Document Delivery & Information Supply* 7, 19-28.

McCaskill, S. D. (1995). "The Undergraduate Reserve Collection: An Open Approach." *College and Undergraduate Libraries* 2, 45-55.

## UNIT NO. 7 SPECIAL COLLECTION

Special collections or rare book rooms play an unusual role in public services. They are a source of pride, image and, occasionally, value to both the library and the community the library serves. Even small public libraries open only a few hours a week often have one shelf, in a secure area, where one or two books of special value to the library reside. The value is not always monetary; it can be informational or even psychological in nature. Like the old family Quran/Bible, retained because of age and its record of the family, communities and organizations frequently have materials that carry special meaning and that may only exist in one copy. Preserving and protecting these items is one of the primary purposes of special collections.

The terms rare book room and rare book collection are inappropriate for many collections, if “rare” means monetarily valuable. A better and more comprehensive term is “special collections” it is the term that is gaining general acceptance. The term does not identify a single format. Most rare book collections contain many types of material: manuscripts, photographs, other objects, and memorabilia. In many ways the library’s special collection is society’s equivalent of an old home attic, filled with material of special meaning and importance. Undoubtedly, without special collections, knowledge of our past would be less complete and likely much less interesting. Individuals lucky enough to work in special collections have an opportunity to handle and study pieces of our past.

One trend in this area, especially in academic libraries, is a combining of the institutional archives program with special collections. This makes sense, especially in an area of limited funding, as both functions have many common elements. Combining the staff of the two functions often results in increased service capability. Preserving institutional history is often a challenge due to the need to create and maintain a balance between being a dumping ground for overflowing office file cabinets and assuring that the important documents do become part of the permanent collection. The key is to remember that a records management program does not assure there will be retention of documents of historical interest. Records management retention schedules also serve as the maximum time an organization must keep the material. Many organizations dispose of the records as quickly as possible.

A rare book collection and/or other “special materials” are important parts of any special collection. If the library collects (as it should) local history



materials-books, booklets. Pamphlets, and so forth even the smallest public library special collection can have research value for beyond its modes size.

### **Role and Philosophy of Special Education**

Preservation and controlled access to items of unusual value are the major functions of special collections. An important secondary role is to assist in or be the focal point of the library's overall preservation program. Special collections can and should house and provide access to those materials requiring special handling and treatment different than what items in the general collection receive. Frequently the unit is responsible for the acquisition and processing of these materials as well, again because of their atypical handling requirements.

While much of the material housed in or acquired for special collections is old, age alone is not the deciding factor. Something may be more than 100 years old and yet not be appropriate for the collection, while something produced yesterday may be most appropriate. The two-basic factor for inclusion are: first, the item's suitability for the library's collection and, second, its need for special handling to assure long-term preservation. If an item fits both criteria, it should be in special collections.

Staff who work in special collections are custodians in the same sense as the old phrase for a librarian, "keeper of the books," conveyed. Some special libraries, especially those with a records management responsibility, will probably engage in many of the activities of special collections, at least for the organization's historical records.

Today the predominant philosophy is that collections are for use; the materials should be as accessible as possible. Potential use is a major factor in deciding to add an item to the collection. The general attitude is that using a book to pieces is better than having it sit unused on the shelf. Dr S R Ranganthan's five statements sum up current thinking about library collections and service:

1. Books are for use.
2. Every reader his book.
3. Every book its reader.
4. Save the time of the reader.
5. A library is a growing organism.

However, in special collection the goal is to preserve the work, both its physical being and its information, by limiting access to essential, rather than casual use. The role of the keeper of the books was to preserve what was a

scarce commodity. And, while it was true the keeper's primary duty was to know where every book in his care was, providing some access to these materials was also part of his duties. Just as is true today, there were certain duties that the librarian had to perform, and the primary duty then was preserving the collection. In some cases, the librarian had to buy a replacement for any book found missing; the difference between then and now is that money for the book came from his pocket, not the library's. It is also important to note that the men who were the keepers of the books were also, in most cases, scholar. It is worth mentioning that today archives and special collections place much more emphasis on proper conservation and preservation activities than was true in the past.

What it all comes down to is that there are different classes of material in library collections. One class consists of heavily used materials (circulating materials) and another consists of those materials requiring special handling and preservation, where staff can control and monitor use. It is balancing two priorities, use and preservation. Both circulating and special collections work involve both use and preservation. For the circulating collection use is first, then preservation, with the reverse true for special collections. One might also say that circulating collections are for present use, while special collections are "for the ages."

### **Collections Storage and Preservation**

It is appropriate to describe briefly the types of material found in special collections and their storage, before discussing preservation. Library's special collections department has, of course, printed books ranging from incunabula and the Shakespeare seventeenth-century folios to contemporary books. In addition, there are manuscripts, maps (from hand drawn maps on goat skin to early twentieth-century developer maps used to promote various areas of city or country), photographs, sketches for movie sets, paintings, sculptures, furniture and rugs, gold records, medals and awards/trophies, chess sets, model ships, tin soldiers, trading cards and hundreds of thousands of postcards. The above range of materials is not atypical for a medium sized library with a special collection unit. Obviously storing this range of material safely require time, thought money, and equipment.

Providing the appropriate storage units is only the first step in what must be a never-ending process of preservation and conservation. Reducing the issue to its most basic components, the problem is how to preserve paper, wood, fabric, leather, plastic, and metal. Each of these has slightly different ideal storage conditions. If special collections is just a room or two which is

usually the case there is a problem in just accommodating a growing collection. Confined to a relatively small area, it is too costly to create a number of mini climates with major differences in temperature and humidity. Even if a library could afford to do this, the materials do not always lend themselves to such simple divisions.

Materials must be always handled gently and carefully. Piling books on top of one another, tugging at headcaps (the top of the book spine, where so many people unfortunately hook their fingers and yank), laying open books down spine-up, mixing large and small or heavy and fragile materials together, and any other unfortunately common practice can have dire consequences.

Manuscripts and other archival materials deserve a special care one can minimize damage to such collections by storing them properly. Placing manuscripts in alkaline folders is the basic first step. A second step is to place groups of related folders into archival boxes. When the group of folders do not fill the box they have a tendency to go into an “archival slump,” the curving of folders one often sees in partially filled filing cabinets. The archive goal is indefinite preservation, and such slumping can cause damage to materials over time. A simple solution to slumping problems is to fill the space with crumpled-up, acid free containers. There are also non-acidic multi-ply spacers available commercially to keep materials upright and flat. When handling manuscript materials, the person should wear cotton gloves to protect the items from harmful skin oils and dirt.

Monitoring the condition of materials is an important aspect of special collections work. Noticing any change in condition, such as cracking leather or paint, warping boards (book covers), splitting vellum, or just new abrasion from reshelving, is an important habit. The librarian in charge of the department or section should be notified of any such indication of change. Of course, a professional conservator should be contacted in the case of significant changes in important items. Library preservation workshops are a good way to help staff learn to identify potential problems.

As in the rest of the library, basic good housekeeping practices are vital, but even more so in special collections. Proper temperature and humidity control are important for a circulating collection but are critical for the survival of special collections. Special air filters can reduce the dust and other airborne particles that act like sandpaper on bindings. For libraries, historical societies, and the like that must live with ordinary filter systems (or none), storing the books in half-sized record center boxes on industrial shelving units will offer protection from particulate matter in the air, as well as offering some

protection from sprinkler systems that might go off, or even damage from falling off the shelf in an earthquake.

Pulling a book off the shelf or pushing it across a work surface causes abrasion from the dust and grit particles. A better practice is to lift books rather than pull them and place materials, where wanted rather than drag or slide them. Regular cleaning of both work and storage surfaces increases the useful life and maintains the value of the items in the collection.

Metal shelving is superior to wood because the stains, varnishes, and paints used on wood can damage bindings. If wooden shelves are a given, insulate materials by lining the shelves with non-harmful material, such as buffered paper board. On the other hand, be sure that metal shelves and file cabinets are not painted with “never-dry” paints that out-gas (give off fumes) indefinitely, which can affect paper, photographic negatives, and other materials. Metal storage units should have only an original layer of inert, baked-on enamel finish.

If there is no special collections room and storing the materials in locked glass cases is the only option available, be certain there is a way to control heat and humidity inside the case. If nothing else is possible, drilling some ventilation holes in the back of the case will help, as long as the air can circulate throughout. If there is no space behind and in front of each shelf it will be necessary to drill holes in each shelving segment to assure the required airflow but be sure no harmful insects are around to crawl or fly through these holes!

The lower the temperature, the better it is for paper and fabrics, but low temperatures can damage leather and plastics. Several people suggest 68 plus or minus 2 degrees Fahrenheit and 45 percent plus or minus 5 percent humidity as a reasonable compromise.

One other important fact to keep in mind is that the temperature and humidity should be constant 24 hours a day, seven days a week, year round. When a library is able to achieve the ideal in temperature and humidity control, it may have to set up a separate work area with higher temperatures for people. It is preferable to provide special collections with an

Independent heating, ventilation, and air conditioning system (HVAC). Such systems are very costly if installed as a remodeling or renovation project; they also add to the cost of new construction, but at a much lower per-foot cost. Oil, water, or electronic air filter systems can be part of the system. Depending on the system chosen, these special filters can remove particles down to less than one micro in size (a micron is 1/25,400 of an inch). Such a filter

System would effectively remove lint, fly ash, dust, pollen, fungus spores, fog and mist, the majority of the bacteria, and a fairly high percentage of tobacco and oil smoke, any of which can pose problems for the material in special collections.

### **Access Security to Special Collection**

Like all other units in public service, the materials in special collections are available for use. At the same time the special, if not unique, character of the materials suggests that limited access to them is prudent. Relatively recent developments in electronic technologies are providing a way to overcome the “professional schizophrenia.” Storage capacity for PCs has escalated and the cost has fallen just as dramatically. Digitizing equipment and software likewise have improved in quality and dropped in price. While we are not aware of any empirical study on the subject, it seems very likely that the vast majority of researchers only need access to the content of the materials in special collections and archives. That is, they do not need to handle the original item as long as the digitized record is an accurate reproduction of the original material.

Museums, archives, and special collections departments are digitizing more and more of their collections: print, photographs, and other graphic materials, as well as three-dimensional objects. Such projects accomplish several goals and help assure the long-term preservation of age in the original material:

- Less handling, therefore better preservation,
- Less restrictive-often unrestricted-access,
- Less time and expense to researchers who can access the material remotely, often through the Internet,
- More service to customers on their own terms,
- More security for the materials by limiting the use to only those times it is essential to have the original.

Many of the projects relate to unique materials that only a few people might be able to consult in person. All such projects greatly enhance the visibility of special collection and archives for the majority of library customers. It also means an ever-increasing role in the overall service program of the library.

Another form of access, as well as promotion and publicity for special collections, is the use of its materials in exhibitions. If the exhibition is in the library, proper display cases may already be available. It is essential that such display cases be secure and suitable for use with a theft detection system and have a microenvironment that controls temperature, humidity and lighting. Because both natural and artificial lighting have an aging effect and because

book structures, even if properly supported, can become stressed over time, special collections materials should not be exhibit for long. Materials loaned to other institutions for exhibits should be dealt with just as safely and securely.

It is important all public and technical service staff have a sound understanding of what kinds of materials are in special collections and know how to recognize these items. Processing for most special collections items is different from general collection materials. Special collections items may be cataloged but they rarely carry obvious library property marks. To mark special collections materials in the same way as circulating materials would greatly detract from their value. They may or may not have an electronic target that sets off the library's security system. Call numbers appear on acid-free card stock strips inserted into the book, or perhaps the library has had a special box or container made to house the item and the box has the call number or location information on it. The point is that special collection items are particularly susceptible to theft because they do not have the usual ownership markings. If the staff is not well aware of what is and is not in special collections, a thief could openly carry off items without challenge. There are, however, even more dramatic things against which libraries, and particularly special collections, must protect themselves, including fire, flood or water damage, earthquake, and other disasters, natural or man-made.

Specialized building construction can generate the greatest increase in security from disaster. Construction costs may be higher than one would like, but long-term security and maintenance costs will be lower, many special collections areas have bank-vault-like rooms that are highly fire resistance and provide a measure of theft protection as well. A final note about theft and thieves relates to security systems. As the market for home security systems has increased, the cost of the systems has decreased. At the same time, the monetary value of special collections has escalated. These facts combine to create a situation in which it may even be cost effective for the library to install such a security system.

Access and security involve three issues: admission to the area, rules regulating use of materials, and the physical protection of the collection. The staff must constantly strive to address and balance all three.

### **Admission and Use (rules regulations to use materials)**

Regulating admission ranges from no restrictions to require a written request in advance of using the materials (sometimes with personal references) explaining why it is necessary to use the collection.

The more screening before a person gains access to the collection, the less likely the library is to have problems with misuse, but it is also less likely that the collection will be used. If you allow people to come to special collections without prior screening, you must still ascertain that the general, circulating collection is unable to supply adequately the desired information.

A major purpose of special collections is to preserve and conserve the materials in these collections; if the same information is obtainable from a non-rare or a non-special source, so much the better. The vetting of prospective users is important, and individuals who need access rarely resent the precautions. Naturally, the process requires tact and respect for the applicant as well as the staff's understanding of the reasons for the importance of the process.

### **Physical Protection of the Materials**

Once a prospective user becomes an approved user, other conditions regarding use apply. Each user should have an orientation regarding the rules governing the use of the collections in general and, specifically, the handling of the requested materials. Readers should not be allowed to take extraneous personal materials into the reading room. The users should be watched at all times and not allowed to hide their work behind book carts, book racks, piles of books, or any other obstacles. Each item should be checked before it is given to the user, and when returned; staff should check condition, content, and completeness. Users should be required to return all library materials before leaving the reading room area, even if they plan to return later in the day to continue their research. The special collections staff must be able to identify who has used which material by keeping adequate check-out records.

These relatively few guidelines for use of the special collection have significant implications for staffing and operational procedures in special collections. Providing adequate, secure storage space for the users' personal property may present a problem if there are a large number of them but is essential if one is to maintain collection security. Having a staff member present in the reading room when users are present helps with monitoring. Carefully planned placement of user stations can help staff monitor use of the materials. However, the physical presence of a staff member who clearly is monitoring user activities does increase security. Close-circuit television cameras, especially those that record, provide even more security, but cannot replace the presence of a staff person.

## **Conclusion**

Special collections is an interesting area to work in, especially if you have an interest or expertise in history or in the subject areas of the particular collections. Working with special collections materials requires constant attention and a talent for detail. Environmental conditions, users' and one's own habits regarding careful handling of materials, and collection security are main concerns in this area.

## **Self-assessment Questions**

1. Discuss the differences between general and special collections materials.
2. What are some of the characteristics of special collections materials that can create complications in storage?
3. What kind of normal library procedures might present a preservation or security problem if used in special collections? How would you guard against these problems?
4. What factors distinguish access to special collections from access to the general collections?

## **Activity**

Prepare a security plan and a guideline for use of special collection.

## **Recommended readings**

Albeury, T. (2013). *The Special Collection*. London: Mulholland Books.

Wilkie, E. C. (2011). *Guide to security considerations and practices for rare book, manuscript, and special collection libraries*. Chicago: Association of College & Research Librarians.

Lee, S. H. (2014). *The role and future of special collections in research libraries: British and American perspectives*. Hoboken: Taylor and Francis.

Harris, V.A. & Weller, A. C. (2012). Use of special collections as an opportunity for outreach in the academic library. *Journal of Library Administration*, 52(3-4): 294-303.

Hirtle, P. B. (2002). The impact of digitization on special collections in libraries. *Libraries & Culture*. 37(1): 42-52.



Mason, M. K. (2014). Outreach 2.0: Promoting archives and special collections through social media. *Public Services Quarterly* 10(2): 157-168.

## UNIT NO. 8 SERIAL SERVICES

Magazines, journals, and newspapers are one of the high interest collection areas for many customers. Serials are generally the place of new ideas and news of recent developments in subjects of interest. Currency is the goal of most serial publications. For the library staff, having the current issue available is a constant challenge, at least for popular titles.

What is a serial? The public may use the term magazines or, the more knowledgeable, periodicals. A few people will ask for journals. All three terms are labels for publications that fall into the class of materials called serials. Serials are a little like breakfast cereals: they come in a variety of forms, with something to suit almost anyone's taste and interests. "Serial" is an all-inclusive term encompassing many publication variations in form, content, and purpose. The American Library Association's ALA Glossary of Library and Information Science provides the following definitions:

**Serial-** A publication issued in successive parts, usually at regular intervals, and, as a rule, intended to be continued indefinitely. Serials include periodicals, annuals (reports, yearbooks, etc.) and memoirs, proceedings, and transactions of societies.

**Periodical-** A publication with a distinctive title intended to appear in successive (usually unbound) numbers of parts at stated or regular intervals and, as a rule, for an indefinite time. Each part generally contains articles by several contributors. Newspapers, whose chief function it is to disseminate news, and the memoirs, proceedings, journals, etc. of societies are not considered Periodicals.

There is overlap in the ALA definitions. General dictionaries, however, have even greater overlap and frequently use phrases such as "a journal is a magazine" or "a magazine is a periodical." Thus, it is not surprising that the public, and sometimes library staff, use these terms interchangeably.

### **Role of Serials in Public Service**

Serials normally contain the most current information about a topic, although some of the professional society serial publication are very slow to appear in print. Currency is an important factor and providing a system that allows patrons to determine the least issue received is important in most libraries. Related to currency is the frequency with which information is updated. For serials, the update interval can be very short, daily in the case of many newspapers. Articles in serial are usually short and focus on a fairly narrow

subject. Readers with very specific information needs frequently find that serials provide the desired data more quickly than books. Finally, serials are often the first printed source of information about a new subject or development. People use serials as a source of learning about new things while using books to gain a broader or deeper knowledge of a subject they may have first encountered in serial. Also, the sheer volume of new information appearing in serial far exceeds that of books.

In some disciplines, especially the sciences, serial publications are the basis for research and other scholarly activities. Corporate library collections also contain a high percentage of serial publications. Certainly, the science and engineering libraries in government, business, and academic settings face heavy user demand and escalating prices for serials. Public libraries serving businesses as well as individuals are experiencing similar problems. Serials play a key role in the dissemination of information. Rapid collection and distribution of information is the goal of most serials. Many users' work is dependent upon quick access to these publications. The library's public service staff also plays a key role in the process of serials publications.

### **Philosophy of Serials Librarianship**

Fifty years ago, it was easy to state the library philosophy about serials publication: collect everything of interest to your customers and maintain everything in the form they most prefer. Today, that may still be what a serials department staff wished to do but, more and more, fiscal and cost-benefit considerations govern serials decisions. Because of their nature, serials create number of special considerations, unlike other formats added to library's collection.

Even in today's more rational serials decision-making environment, each title does represent a potential long-term commitment. The ongoing nature of a serial means that each year the library will receive and must pay a bill (or invoice) to continue receiving the title. For some titles the staff know they must maintain the subscription because of their value to the library's primary service population. In such cases, the library places the subscription on an automatic renewal basis by the vendor unless directed to cancel. Automatic renewal of titles usually means no staff review of the title and its appropriateness for the collection. Another characteristic of serials, somewhat related to the above, is their arrival at the library in parts. These "parts" are normally paper covered and carry a number such as: Volume 31, No. 3, Summer 2010. Even the newsletters carry numbers and are parts of a "volume." Depending on the number of pages per part, the library may need

to house the loose issues for a year or more. Users expect to find the individual parts when needed; this in turn places pressure on the public service staff to maintain the items in reasonable order. No matter what the Staff attitude may or may not be, eventually the number of individual parts reaches the point where maintaining their proper order is critical. The two most common treatments are binding the material and microfilming it. An important access question for the public is how to find the required information in the hundreds or thousands of serials in a library's collection. Going through each issue is not efficient, and few people are willing to do this. Many serials' producers publish an annual index, but this is of no help with current issues.

### **Types of Serials**

A serial is a publication that is issued in parts, at intervals. Periodicals, journals, magazines, annuals, and irregular serials are all types of serials. A periodical is a type of serial published with a fixed interval between each issue. Journals and magazines are types of periodicals. Journals are scholarly, while magazines typically appeal to a more general audience and are more likely to be found on newsstands. Annuals are serials that are published once a year, such as a yearbook or almanac. Irregular serials are not published at regular intervals. Examples of irregular serials are directories or conference proceedings. Among serial publications, periodicals are of most significance to libraries. While general interest periodicals which are most commonly found in various types of libraries are expected to grow, an even greater rate of growth can be predicted for specialized periodicals. Following are some types of serials found in various academic, public and special libraries.

### **Institutional Reports**

Institutional Reporting are reports generated for shareholders, banks, financial institutions, customers, suppliers, and stakeholders. Institutional reports contain economical and financial data found within the profits and loss document, the balance sheet, cash flow statement. They are often reported either quarterly or semi-annually. Often, the reports will contain data analysis using causal and predictive statistical models which support their assessment. These publications are relatively short (15-30 pages) and second, they are often smaller than the 8.5 by 11-inch format. Generally, libraries do not classify such items, and house them in file boxed or filing cabinets. Keeping the files in order is an area of concern for public services. Typically,

the reports are filed in alphabetical order by the name of the issuing organization. Maintaining the files is, therefore, important to retain the goodwill of the public and the technical service staff responsible for securing the reports.

### **Yearbooks and Proceedings**

A related category is the one covering annual, biennial, and occasional publications of societies and associations. These yearbooks, almanacs, proceedings, transactions, memoirs, directories, and reports are usually bound or stapled. Most of publications in this category are substantial in length and size, and libraries normally treat them as books. The only problem this group may give to public service staff occurs with those titles for which the current year volume is in the reference area and older volumes are in the stacks. The problem is the result of a lack of current information in the public service area about which issue, or volume is the most recent. In this instance, knowing a little more about the characteristics of serials will mean more satisfactory service as well as maintaining good staff relations.

### **Superseding Serials**

Without question the most problematic serial category is the superseding serial service. This is a publication in which each new issue or part of a volume supersedes the previous issue and the library discard the older issue. Included in this category are telephone directories, airline and other travel-related schedules, catalogs, and the loose-leaf data services. It is this last group, loose-leaf services, that creates the most challenges. It is the library's responsibility to remove the superseded sections and insert the new material, which may be individual pages, sections within chapters, or entire chapters. Given the type of information published in this format, it is imperative to maintain these serials properly; the consequences for failing to do so are great. Normally, it is the public service staff that is responsible for filing these materials, and it is a good idea to only have one person responsible for the work.

### **Newspapers**

Still another category of serials, newspapers, causes special problems for public service staff. Keeping the newspapers in good order, with all the section for a given date in place, can be a frustrating activity. Library supply houses offer equipment that helps keep newspapers in order. Most are some form of rod or stick that holds the individual sections in place. Access to and

storage of newspapers is another problem for libraries. Generally, finding a specific story in a local paper newspaper is very time consuming. Today more and more newspapers are putting some, if not all, of their articles on a web home page. Also, various commercial sources such as Lexis/Nexis provide access to electronic versions of newspapers. For many newspapers with home pages, Internet search engines provide something like an indexing service. Given the lack of indexing and poor quality of paper used in newspaper printing, long-term storage of bulky runs of old newspapers requires careful thought and substantial amounts of shelving. Only the highly motivated users will work through stacks of unindexed newspapers in search of specific information. And, in just a few years, the paper will lose most of its strength, so handling the paper may cause damage. Transferring the newspaper to a microformat (film or fiche) and scanning solves the storage and, perhaps, the preservation concerns.

### **Newsletters**

Newsletters, leaflets, and news releases are in the final category of serials that presents a challenge for public service staff. Most of the categories discussed earlier are small sized, short length formats. Numbered items in this class are easy to keep in order. The long-term retention is not necessary for many items in this class. Depending on the library's goals, most of these items may be truly temporary in nature. Newsletter that are vehicles for announcing meetings, calls for papers, and personnel news and so forth are prime candidates for short-term storage and quick discarding. Press (news) releases in most libraries go out with the day's wastepaper. The expensive newsletters that supply data for researchers normally receive treatment similar to other items intended for long-term storage: binding or microfilming and scanning.

### **Non-superseding Serials**

Related to the superseding serials are the non-superseding serials. A loose-leaf service issues updates in the loose-leaf format and periodically sends another loose-leaf binder. An example of such a service is *Facts on File*. Often, statistical information is disseminated in this non-superseding manner. While the new material is current and may, in one sense, supersede older data, there is historical value to the older sheets. For Example: Economic Survey of Pakistan, Statistical Reports, and Census Reports etc.

## **Magazines**

This is the most common type of serial publication. This type can be divided into two broad categories further, magazines (popular publications) and journals (scholarly publications). These categories further subdivided into 11 categories which includes as follows:

- Mass market serials, weekly or monthly newsmagazines (such as Newsweek),
- Popular magazines dealing with fiction, picture, sports, travel, fashion, sex, humor, and comics (such as Sports magazines),
- Magazines that popularize science, social, political, and cultural affairs (such as Smithsonian, Times, Science today etc.),
- Magazines for focusing on opinion and criticism, especially social, political, literacy, artistic, aesthetic, or religious (an example is Foreign Affairs),
- “Other magazines not elsewhere classified” category. An example of an item in the last category is an organization publication (governmental or private) that is really a public relations vehicle, sometimes called a house organ. These publications often contain general interest material, but there is usually some clearly stated or implied relationship between the subject covered and the issuing organization.

Another type of publication in the “other” category is the magazine found in the pocket of airline seats. These publications contain interesting short articles about people, places, and things. Many contain advertising, so the magazine not only helps distract the nervous traveler, but also provides an additional source of revenue for the airline.

Libraries may receive a substantial number of house organs because their publishers give them away. We do not know of any library collecting airline magazines, but perhaps, somewhere, in a research or corporate library, some collection development officer is trying to work out a plan for doing just that. Who knows when some sociologist may wish to study the reading habits of airline passengers?

## **Journals**

Within the journal’s category experts identifies four subcategories.

**First, “Nonspecialized journals for the intelligentsia”** are for persons well informed on topics such as literature, art, social affairs, science, or politics. (*Science* would be an example.)

**Second, “Learned journals for specialists,”** both primary and secondary, are major components in academic and large publish libraries’ serials collections. (American Indian Culture and Research Journal is an example.)

**Third, “Practical professional journals”** in fields such as medicine, law, agriculture, management and librarianship (RQ for example) are also common in all libraries.

**Fourth, there are the “Parochial journals”** that are of interest to local or regional audience (Kiva is an example).

Local history groups often publish a small journal for members. While most issues have only local interest, some large research libraries collect such publications in support of their mission of collecting and preserving research and potential research materials.

With the above variations in serials in mind, we can understand why there is confusion about terms and problems in collecting and preserving these publications. Each type fills a niche in the information dissemination system. While they do create special handling procedures and problems, they are a necessary part of any library’s collection, and the public service staff must deal with them.

### **Serials in Digital or Paper Format**

Many of the already discussed categories of serials now available in a digitized format. Some, professional journals, are only available in that form: electronic journal. Most are available either in a CD-ROM format or through the Internet. There is no question about the popularity of such materials with library users. They often prefer the electronic version, especially for indexing and abstracting capabilities. One advantage of the electronic index is the capability to perform complete searches quickly (for example basic search, advanced search/Boolean search). Another advantage is the ease of printing or downloading the search results. There are number of issues to ponder in the interplay between digitized and paper-based serials. One and major issue is how to provide access. Digital serials, in theory, are accessible anywhere, anytime as long as there is a connection between a computer and the database containing the desired material. Many users and technology supporters believe this is the ideal future: anywhere, anytime. Library literature generally approached this issue in terms of ownership versus access.

When a library subscribes to a paper journal, the library owns those copies of the title for which it paid the appropriate fee. Electronic formats are often a different matter. Producers of the electronic material usually include a license agreement that limits the library’s ability to use the material and, not



infrequently, states that the library has access rights only so long as the annual fee is current. In essence, the library only leases the data. If a library has any responsibility for long-term retention of information, leasing is a problematic policy.

Another aspect of serials is the issue of the concepts of “just-in-case” and “just-in-time.” Long-term preservation is, in a sense, “just-in-case.” That is, someone will require the information sometime. “Just-in-time” is locating the desired material at the time the user needs it, most often from somewhere other than the home library collection. Digitizing data makes just-in-time delivery a realistic option. One reality is that fewer and fewer libraries can continue to subscribe to thousands of serial titles just-in-case. If there is a paper subscription, it is for high demand, not seldom used titles.

Digitized serials are a mixed blessing. They are very popular, they provide more flexibility in searching than their paper-based counterparts, and remote access anytime is a possibility. They do not reduce library operating costs, they do present new challenges for public service staff, and electronic systems fail as do power supplies, causing user and staff frustration. Also, as anyone who has spent much time with Internet-based services knows, electronic does not always translate into fast. Waiting for files to load, waiting to have the server “accept” your query, or being abruptly cut off in mid-session are sources of frustration that do not exist with paper-based serials. On the other hand, torn-out article, volumes not on the shelf, and the library closed for a holiday are not problems with the electronic serials.

### **Organization, Access, and Circulation Decisions**

Decisions about the organization, access, and circulation of serials will commit the staff to more or less effort. These decisions revolve around many factors: storage, preservation, copyright, staffing, space, type of users, users’ needs, security, and prior history (how serials were handled in the past in the library).

There are three basic ways to organize journals and magazines for the public alphabetically by title, alphabetically by title within broad topical groupings (for example: history, travel, or business, library and information science etc.) and in classified order, using the same classification system as used for the books in the collection. When using a classified approach, a decision to integrate the serials into the book collection may result in the public service staff regularly shifting thousands of feet of shelved books to make room for the constant growth of the serials titles.

Thus, the classified approach, with the current issues shelved next to the back files and books with the same classification number, is ideal for the customer. One given condition of serials is their constant growth; this necessitates shifting periodicals to make room for the latest bound volumes, which is an ongoing challenge for the public service staff.

From a service or access point of view, the classified approach will mean additional explanations to the public. Commercial indexing and abstracting services, heavily used by the public to secure periodical references, do not show classification information. Classification and code numbers can be complex and the public does, at times have some difficulty locating the proper section of the stacks. Therefore, even when users have easy access to an alphabetical list of periodicals held by the library giving the classification of numbers, public service staff will get numerous requests to help find a title in the stacks. The alphabetical-by-title approach makes it easy for the user to locate a cited periodical title. (figure)

The topical or subject arrangement is a compromise between full classification and alphabetical by title. It provides some grouping by periodical content, and some users have less trouble finding what they want. In essence, it becomes necessary to create a series of cross reference messages in the stacks. Keeping the system accurate and up to date is an ongoing process for the staff. A variety of signage methods, blocks of wood on the shelf, paper taped to the shelf, and metal sign holders, which indicate those titles.

When space is a problem, keeping all the current issues together, regardless of the system used to organize the issues on the shelf, provides maximum space utilization. Keeping all the current issues in one area allows for more shelves per shelving section. Improved preservation and security also result from keeping all the current issues in one location. Preservation is better because the tighter shelf spacing reduces the chances of issues falling behind shelves and becoming "lost" or damaged. Security is also better for the loose issues because staff can walk through the unbound periodical area more frequently than covering the entire stack area. In libraries, where staffing and space allow, house current periodicals together and out of the public areas. A user submits a request to use a specific issue and a staff member brings the issue to the user. The user signs for the issue and may have a fixed time to return the issue, in essence a closed reserve system. Using this system provides better control of the current serials.

## **Operations and Staffing**

Keeping track of hundreds and often thousands of individual serial issues coming into the library requires planning and a staff committed to accuracy. The staffing organization for handling serials varies. In some libraries there is a serials department that handles both technical and public service functions. Other libraries allocate serials functions to both public and technical services. The method used depends on the type of expertise most needed to effectively handle serials for that library. Each allows for a different type of staff specialization. Obviously, working with serials is complex. The acquisition, processing, and cataloging of serials require slightly different practices and rules than those used for books. Providing public access also requires different knowledge and skills. No matter which organizational pattern exists, the goal must be to maintain control over the materials. Common questions asked by both users and the library staff include:

1. What is on order?
2. What titles do we receive?
3. What issues are here?
4. What is missing?
5. What is at the bindery?

With an automated serials control system, we can find information more quickly than in a manual system. Such systems often allow public access to information in the check-in file. Whether working with a manual or automated system, check-in routines require care and accuracy to produce helpful information.

All public service staff are likely to have some involvement with serials. Reference staff direct users to indexing and abstracting services and also assist in locating serials in the collection. Interlibrary loan staff will have much of their work generated by requests to borrow or loan articles from serials. Circulation staff will probably have requests to borrow serials and need to understand and effectively explain the library's serials circulation policy. The entire public service staff will need to monitor the use of serials, with the goal being to keep theft, loss, and damage to a minimum.

Two types of record keeping are important for serials. Accurate records of losses and damaged items can assist the library and its funding sources by showing whether or not more security measures are needed.

## **Conclusion**

Serials are complex publications, and the public depends on libraries to supply most of their serial needs. Serials present many challenges for public

service staff. Knowing more about the nature of serials and their publication helps in understanding the importance of these items, if not reducing some of the frustration and work they create.

### **Self-assessment Questions**

1. What are five important characteristics of serials?
1. List three areas in which serials generate work for public service staff.
2. Explain with examples the categories and special characteristics of serials and their impact upon public service activities.
3. Describe the methods of organization that can be used to keep periodicals in order in the stacks.
4. What are the major features of a serials control system?

### **Activity**

With the consultation of tutor select any university library and prepare an organization plan of its periodical section.

### **Recommended readings**

Russell, R. (2000). Making sense of standards and technologies for serials management: a guide to practice and future developments for libraries, publishers and system developers. London: UK Office for Library and Information Networking, University of Bath.

Balakrishnan, S. (2001). Library serials management. New Delhi: Commonwealth.

IFLA & Szilvassy, J. (2013). Basic serials management handbook. Berlin; Boston: K.G. Saur.

Pinzelik, B. P. (1982). The serials maze: providing public services for a large serials collection. *Journal of Academic Librarianship* 8(2): 89-94.

Flower, D. (2004). E-serials collection management: transitions, trends and technicalities. London: The Haworth Press.

Bazin, P., Desmaris, N., & Schuster, J. (2006). Periodicals collection management: Organizing, creating, and maintaining system. *Library Management* 27(9): 590-599.

## **UNIT NO. 9**

### **MEDIA SERVICES AND GOVERNMENT INFORMATION**

Certainly, some libraries have had media collection for much longer than just 30 years. Over the past 30 years, librarians and those who fund libraries have become more and more accepting of the idea that libraries should include nonprint materials. In fact, formats other than print on paper have an important role to play in providing the level of service the community expects and wants. However, the advent of cable television, home video cassette recorder, computers, and the Internet has created an environment where most libraries have some type of nonprint collection. Essentially, libraries have recognized they are in the information, rather than just the book and magazine, business. The use of computerized typesetting and scanning equipment, which produces a record of the text in a digital format, opens up a number of options for delivering the information, including the Internet. If libraries confine themselves just to the traditional paper and print formats, they will quickly lose ground to organizations that define their business in the same manner as the producers.

#### **Role of Media in Public Service**

In the not-too-distant past, many libraries treated media as marginal material, a way to get people in and then get them “hooked on books.” Many libraries except media centers in schools and community colleges only saw a recreational or entertainment value in nonprint materials. Media took second place to books; this is still the case today in a few libraries.

Primary school, secondary school, and community college libraries took the lead in incorporating all formats into their service programs. These institutions used media for instruction and recognized that many ideas are best expressed using a form other than the printed word. Use of media in classrooms has been a long-standing tradition in these institutions, unlike four-year colleges and universities.

In academic institutions the pattern was to establish separate units to handle media needs. Academic institutions tended to view media, essentially films, as solely classroom material; even then there were doubts about its real instructional value. Some professors believed, and some still do today, that use of media in classroom was the lazy person’s way of not “doing” the teaching himself or herself. Certainly, art, film, music, and theater departments were exceptions, but they tended to create their own departmental collections for staff and majors’ use only. That is, faculty now

make use of media both in and out of the classroom, and often the assignment requires the combined use of print and nonprint items. It is less costly for the institution as well as less time consuming for the student to have a single service point. Therefore, the trend is to integrate print and non-print materials services, more often than not in, or administratively part of the library. Integration of all formats will be what most people will demand and expect today and more in the future.

Public libraries were early collectors of sound recordings, and a number developed film collections. Sound recordings circulated and over time expanded from just classical music to all forms of music and the spoken word. Motion picture films attracted groups for in-house showings and were also available for loan to groups such as scouts, churches, and occasionally schools. Today, few libraries collect films except in a video format and the number of public libraries doing so is growing.

Media play an important role in meeting the educational and recreational needs of the service community. Some people are print oriented, while others prefer audio or graphic presentations of information. For many types of information, a print format is inappropriate. Limiting a collection to one or two formats seldom provides the range of services appropriate to the service community's needs.

### **Philosophy of Media Service**

One goal of media service is to make the use of the equipment so simple that it is "transparent." This means the users focus their attention on the information presented rather than on working the equipment. In the past, using the equipment was so complex that some people refused to learn how to operate it. Now most of the equipment is easy to use, as long as all one wants to do is play back the information. One important issue in keeping equipment simple to use is maintaining it in good working order.

In addition to making operations simple, most media specialists recommend integrating media with other services. This ideal is not often fully achieved. The ideal OPAC would reflect the total holdings of the library regardless of format. The reason for the separation of media and print formats in catalogs of the past was the result of administrative work patterns. Having a book catalog, a serials catalog, a media catalog was common not too many years ago. Also, until relatively recently, there were no generally accepted rules for cataloging all the different media formats that would allow an integrated catalog. Another factor, at least in academic institutions, was that the media services unit was not part of the library. With more and more libraries

collecting all formats, along with greater administrative integration, there is a strong need for a single integrated catalog. OPAC make this process more feasible and less demanding on staff time. Another goal of media service is to collect and provide access all the appropriate formats. This means the public service staff must know and appreciate the value of all the formats collected. It also means the staff must know how to operate the appropriate equipment and be able to assist the public. Recognizing that some individuals have strong preferences for one format or another is also important, as well as not letting the staff's personal preferences influence the service provided. What the future holds for public services in terms of information technology and the possibilities raised by remote access to databases and the Internet is impossible to predict with certainty. What is certain is that people will need assistance in selecting the most useful databases and information formats as well as in using the technology effectively.

### **Different Media Formats**

Media formats, like print formats, exist in a variety of sizes and shapes. Unlike the print forms, each media format requires special equipment or handling for an individual to gain access to its information. Here in this unit, we discuss only 14 of the most commonly collected media formats and some of their implications for public service.

### **Microforms**

Although microforms are generally carriers of print information and not the same as other media, they do require equipment use as well as special handling. One reason libraries acquire microforms is that they are space savers, especially for storing low-use materials. There never seems to be enough shelf space. Public service staff spend many hours each year shifting collections to make "just a little more room." Thirty years of back issues of a journal, occupying 25 feet of shelving, can be reduced to three reels of microfilm which, in their cardboard storage boxes, require less than one foot of space. Microforms are also a means of access to primary research material or to items that are very rare and may only be available, in their original form, in one or two libraries in the world.

The two most common microform formats in libraries are reels and fiche. Reel formats are the older of the two and are still widely used for newspaper and serials. Reel microfilms are long strips of film on the appropriate size reel and come in several sizes: 16, 35, and 70mm. Most libraries try to confine the microfilm collection to one or two sizes (35mm and 70mm) and

one type (positive). With any large-scale collection, however, more variety is inevitable, because the information needed by the library is only available in a particular size and type of microfilm. Most individuals, however, will avoid microforms and use them only as a last resort; these people will need assistance. Microfiche are sheets of film with the images of the original document arranged in columns and rows. Fiche tend to be used for materials that are likely to have many people needing access at the same time or with multiple means of access.

Like other media, microfiche comes in variety of sizes as well as reduction ratios. Common sizes are 3 by 5 inches, 3 by 6 inches, and 6 by 7 inches, while reduction ratios range from 12 to over 200. The greater the reduction ratio the more information the producer can fit on a single fiche. Libraries try to limit the variation in fiche size and reeducation ratio but, like microfilm, a variety of types is inevitable.

### **Motion Pictures (Film and Video)**

This type of media includes film and video and has taken over most of the role films used to play in libraries. Most educational/instructional films now available online was available in past on videocassettes. Almost all individuals used a library and know how to operate a VCR, which means less staff time was spent in assisting in equipment set-up. In past years, all of the films were educational documentary in character and most of the public libraries tended to use them for programming purpose rather than circulation. The strength of this media is that it provides better quality images in a large room setting (current video projection system are changing that) and the film image is (or was) vastly superior to a video image (here high definition television/video may change this). It is still the best format for teaching cinema studies.

### ***Films***

Films also come in a variety of sizes such as 8, 16, and 35mm formats are, or were, common in libraries. The 70mm format is collected primarily by film archives or universities with degree program in cinematography, as it is the size most often used for distribution of so-called theatrical films, the type shown in movie theaters. As a result, the staff will need to understand and work with films, perhaps in several size formats.

The 8mm film (the home movie size) is more common in school community college media centers. Films of the 35 and 16mm sizes are for use with groups in classrooms and small auditoriums. For public service staff this



format does not present too many problems. Film can be silent or have sound. There are two different types of sound. There are two different types of soundtracks, optical and magnetic, and each type require a different projector. Normally the soundtrack is optical on 16mm and 35mm and magnetic on 80mm, but not always. Nothing creates ill will more quickly than providing the wrong or inoperative equipment. Most film producers now provide a choice of film or video for titles intended for the educational market. Even if libraries no longer require the film format media, some retain their existing films because replacement videos are unavailable, and some people still use the films.

### ***Video Recordings***

Video recording, in the cassette format, reduce the equipment problems associated with motion picture collections. More and more people own video cassette player-reorders and therefore know something about how to operate the equipment, unlike the situation with motion picture projectors.

Most film producers offer both film and video formats, sometimes 8mm and 16mm, VHS, and very rarely 35mm. the three-quarter-inch format sometimes called U-Matic, was (and still is) yet another option for video collections in the library. Intended for institutional use, the design of both the cassette and player was intended to withstand the heavy use, and sometimes abuse, that occurs in schools, colleges, and business settings. A few libraries still have collections of reel-to-reel videotapes and one or two players, but most of the tapes are in-house productions and seldom used. More often than not these are transferred to a cassette if there is any expectation of real use. Depending upon the purpose of the video collection, circulation or instruction, the problems for the public service staff vary. In many ways the circulating collection creates the greatest number of concerns, ranging from reserving or not reserving tapes for individuals to maintaining some listing of cassette titles available. Academic libraries also have their challenges about the suitability of some of the titles in the collection. Public libraries face the greatest challenge. Their public is in fact anyone, children to senior. Very often the individuals who raise a question about the suitability of certain title will do so in the context of "protecting the children." In addition to the broad service community, public library video collections have, in general, a high percentage of theatrical titles. Videos are an important source of programing for the public library's service community, especially children. Programing can be something of a problem because of something called "performance rights."

### ***Laser Discs***

As compared to earlier mentioned formats a relatively new format, but became old for theatrical release gaining in popularity was the laser disc. In past it was a play-only technology, which has slowed its growth in the home marketplace. When it seriously cuts into the videocassette player-recorder market, libraries will need to consider adding this format to their collections. The manufacturers claim that the laser disc technology produces a much sharper, clearer picture with better color. Users who have seen both the cassette and disc versions of movie agree. In past, most of libraries have laser discs and have circulating collections of them. Another format that was appeared commercially for home use was DVD it eventually has an impact on library collection. Online Video website such as (YouTube, Instagram, social media) have replaced this format with a diver's collections which is freely available, accessible 24/7, user-friendly and high-quality media.

### **Filmstrips**

A format related to film is the filmstrip. A filmstrip (usually 16mm or 35mm) is a series of single frame still photographs on a strip of film. In past Most of educational and public libraries have filmstrip collections. In the public library, they were in the children's section. Historically, educational libraries, schools, and colleges often have a broader range of filmstrips. Schools do collect the audio filmstrips based on picture books, but most of the collection is of a more instructional nature. Filmstrips are less expensive than motion picture film and the user has the advantage of being able to stop the film at any image for careful study. In essence one can think of filmstrips as an uncut set of slides. Almost all commercial filmstrips in a library's collection could have been produced as a slide set. A major advantage of the filmstrip over a set of slides, from a library point of view, is that it is easier to handle one filmstrip to keep track of 75 to 100 individual slides that should be shown a prescribed sequence.

In today's electronic environment it may be difficult to believe filmstrips have any future; perhaps they do not. However, there are still companies producing them and apparently managing to stay in business. Most of archive centers are still collections of filmstrips of various rare books/material and manuscripts of significance value for researchers.

### **Slides**

For most users of library, the term photographic slides recall the family collection of 35mm slides from various vacation trips and family events.

Indeed, the common 35mm slide is a part of many library collections, but it is not just a matter of collecting the garden-variety paper-mounted 2 by 2-inch 35mm slide.

Like all the other media formats, there are several variations on a common theme. Large slide collections are likely to consist of 2 by 2 inch.2¼ by 2¼ inch, and 3 by 2-inch slides, perhaps with even a few old glass lantern slides. Slide mountings also vary from paper to plastic to meta to glass. Each type of mounting material results in a different thickness for the final slide, which may create some projection and projector problems. While the 35mm slide is satisfactory for most general purposes, high-definition slides require a large film format. In past and presently such slides were commonly found in special libraries, especially those supporting scientific, medical, and art museum work.

### **Flat Pictures**

Flat pictures, paintings, posters, postcards and photographs, and other pictorial materials are often part of library's collection. Some school library media centers have a collection of pictures from magazines and other sources that teachers use to supplement their personal collections. The collection focuses on the teaching units in the school district. Some public libraries have a circulating collection of art reproductions, both paintings and sculptures. Museums and academic libraries often have extensive collections of posters, in the case of academic libraries usually housed in special collections. Photographic archives, museums, and academic libraries often have collections of photographs and occasionally postcards. The archive focuses on photographs on historic photographs.

Providing access to pictorial material is a long-standing problem. Users sometimes complain about where the library has classified a book or serial title. If users had similar access to pictorial material, complaints would be constant. Pictures generally include a number of people or objects, as well as background scenery. Identifying the main feature and organizing the collection for use presents a challenge for the library. Whatever system is in place, the public service staff will need to understand it to assist patrons in using the pictorial files effectively. Keeping the files in proper order, while not a major problem, is important for efficient service.

Scanning images is one approach to keeping pictorial material in order. However, unless one does a great deal of coding, access by different subject/content categories is not improved by scanning, certainly images on the Internet are searchable to a point but mounting a large number of scanned

images requires staff commitment and equipment and the results are still not too accessible.

### **Maps**

Maps are a form of pictorial material and most libraries have at least a small collection, in addition to atlases in the reference collection. Small collections of local area maps pose no particular problem other than having them disappear into an individual's books or briefcase. Large public libraries, academic libraries, and many business and industrial libraries have extensive collections. Maps, as graphic representations of geological, physical, and natural features, take many forms and shapes, from folded road maps to raised relief globes. Any major map collection must determine its scope and define what to collect. Most would include aerial photographs, including satellite photographs, but should they also house the remote sensing data from satellites?

Depending on the collection's purpose, maps can be organized in a simple geographic location sequences or by some more complex system. Staff working with large map collections will need special training to handle this format properly.

### **Games and Realia**

While schools are the primary collectors of games and realia. Some public and a few academic libraries have small collections. Public libraries sometimes have loan collections of games and toys that may attract new users to the library. School library media centers collect educational games for use in the classroom or in the media center. Teaching realia and models can range from samples of materials, such as rocks or insects, to working models, to large, take-apart anatomical models. Scientific and technical supply houses offer a variety of large-scale models for use in the classroom. Because the models are expensive, few teachers can afford to buy them and the instructional media center is the usual source for these, except where there is a large biology or physics department, that acquires the items. Even in the case of large departments, students get better service if the models are in the media center where they can examine the material any time.

### **Audio Recordings**

Returning to a widely held format, audio recordings, we again encounter great diversity and incompatibility. Sound recordings were among the first nonprint formats collected by libraries. In public libraries the recordings are

usually part of the circulating collection. For educational libraries the purpose is usually instructional, with limited use outside the library. This is the media category that most clearly reflects the long-term influence of a changing technology on a library collection. While a few music libraries and archives have collections of early cylinder recordings, by the time libraries began actively collecting recordings the standard format was the flat disc. Near past, tape and CDs are the most popular formats for sound recordings. Each format will need its own equipment or older more flexible equipment, either of which requires special skills to maintain. Presently, there is a big change taking place and exists: digital tapes, online spaces and libraries of old sound recordings which will probably mean yet one more format to collect and provide access to users.

The variety of formats and equipment may provide a slight challenge for the public service staff. Most homes have some type of sound recording equipment; therefore, staff members have greater familiarity with this equipment than other media equipment.

### **Television**

The type of television technology that sometimes are part of the library's public service program, other than video recordings, are closed circuit television and satellite links. If the library has become an organization's information center, it is likely that closed circuit television and/or television satellite links will be part of the library's responsibilities. Closed-circuit television, a system to distribute video signals from a central location to a series of monitors by cable or microwave, has a variety of uses. It can eliminate travel time for meetings: rather than bring people together in a single room, the system can link them together. It makes it possible to share information simultaneously with hundreds or thousands of people. Another use is to distribute a videocassette presentation from a media center to single or multiple classrooms.

Television satellite linkup (uplink for sending and downlink for receiving), in a sense, is a form of closed-circuit television for large-scale geographic coverage. Used primarily for conferences in a library context, the technology has potential for distance learning. In theory it is possible, using this technology, to have an international conference involving participants on every continent without anyone leaving his or her country. It is interesting to think about the long-term implications of this and related technology for educational libraries.

### **Computer Software**

School library media centers were the early leaders in patron access to computers and software in library environment. There was a time when libraries thought they should add loaning of computer software to their service programs. Some public and academic libraries did experiment with circulating computer software. Most of these experiments ended by dropping the service for practical and legal reasons. Selection of appropriate software has become as important as selecting books and journals. Providing access to the packages requires the public service staff to know the use of the computer and the various software applications.

### **Access, Storage, Preservation and Circulation**

As discussed earlier there are variations in size and shape of the media formats. This variety has implications for storage and access. While it is possible to use standard library bookcases to house these materials, even with adjustable shelves such storage wastes space. Library equipment and supply houses offer a wide range of cabinets and storage units designed for the different formats. What type of storage unit to use depends upon decisions made regarding circulation of the material and direct public access?

### ***Microform***

Very few libraries have circulating microform collections and most use cabinets with drawers designed to hold either fiche or reels. The cabinets are multiple-drawer units, which are very heavy even when empty and exceedingly heavy when filled. Normally libraries store their microfilm rolls inside a small cardboard container that has a small identification label. Microfiche may or may not be stored inside a protective cover, such as an envelope or notebook. Most damage occurs during the filing and refiling process. Damage to a corner of the fiche can put a scratch down the entire surface of the fiche behind it.

### ***Film***

Motion picture films seldom circulate, and libraries usually store them in a nonpublic area of the library. As with microfilms, the container has the label identifying the title. Some libraries splice an additional leader with identification information to the film's leader and add a label to help quickly identify a reel of film not in a canister. Because the public seldom has direct access to the films. Special film storage racks or special library shelving with slots allow the library to divide the three-foot shelf into a number of small

storage compartments and are common for housing film. Films need regular inspection, at least once every six months, even if they sit in their storage cans unused. Early twentieth century photographic films were nitrate based. These films are very unstable and can pose a fire danger. Films and photographic negative dating before 1950 could be nitrate based. Most major collections of nitrate films are known, and safety precautions are in place. But the staff members who work with films should make sure they know that they have no nitrate-based stock.

### *Videotape*

The most library video collections are in the cassette format. The colorful, but thin, cardboard covers are not sufficient to provide long-term protection for circulating cassettes. Special videocassette storage boxes are available and are a wise investment for getting the maximum life from the cassettes. The special boxes provide much greater protection because they fully enclose the cassette. The full closure reduces the risk of accidental damage from dropping a cassette. Many of the commercial covers are open on the bottom or side. Careless handling can cause the cassette to fall out and become damaged. One unfortunate characteristic of videotapes is their limited playing life, somewhat like professional athletes. The number of times they can be played before visible damage appears depends on several factors. Most of the damage occurs because of equipment conditions rather than improper handling.

Display of the library's loan collection of videocassettes generally follows the pattern of video rental stores; that is, the borrowers do not handle the cassette until they make one or more selection(s). Having the cassette in the box reduces staff time required for handling the video but it increases the risk of accidental damage and theft. In short, staff workload, available space, and the philosophy about how much loss is acceptable will determine the approach used.

### *Filmstrips*

Filmstrips can use up substantial space despite their small size. If all one had to store were the small film canisters, one microfilm cabinet would be enough store all the filmstrips in a library and have space left over. The problems are with the variations, such as filmstrips books, and audio recordings. Many public libraries put such packages into clear plastic bags and hang them on revolving racks, similar to racks use to display paperbacks and greeting cards. That approach is fine as long as the collection is small.

Educational libraries usually have collections too large for that method and tend to use standard library shelving despite the waste of space. Keeping the material in the manufacturers' original packaging is often best, even if these packages use up even more space.

Filmstrips rarely are used outside the library other than in the classroom. They pose no special handling or preservation problems. The major problem from a staff point of view is their apparent endless variations in size and the equipment needed to use them.

### ***Slides***

Slides are normally stored in special cabinets or storage boxes. The cabinet exteriors look like microfilm and video cabinets except that there are more drawers. Drawers have rows created by metal dividers with slots in them. The width of the slot will accommodate the typical slide mounts. In fact, two cardboard mounted slides can fit in one slot, but doing that can damage the cardboard mounts to the point that they will jam in the projector. Storing the slides in the trays or magazines used with the projectors will save everyone time and trouble. Digitization of slide collection is that it opens up the possibility of remote access to the material through a network; it also reduces the staff time spent in sorting and refiling individual slides. The major problem with digitization is legal. Just like other creative products, most slides are copyrighted. This approach will require more storage space because there will be more trays than needed to operate each projector the library owns. Usually, such collections came from a variety of sources, making the tracking down of who holds rights to what very complex. Nevertheless, digitization may be the best alternative for long-term preservation and better access.

### ***Flat Materials***

Flat pictures, posters, and maps are most effectively stored in map cases. Posters and maps seldom circulate but, because of their size (usually large), and medium weight paper, they do present special handling problems. Especially if old, valuable, or fragile. In some libraries, valuable or heavily-used items are encapsulated in Mylar to prevent damage. Properly maintaining flat material such as maps and posters, requires more staff time than their number might suggest.



### ***Other Materials***

Paintings, sculptures, realia, and games all require special storage or display units. Usually these collections are small and, other than games, pose no unusual problems for the staff. Transparencies can be stored in legal-sized file drawers. Store computer software in the original box or special disk storage boxed. Software, as long as it does not circulate, causes no problem for the staff, other than knowing something about how to use it and the computer and making sure it is protected from dust, excessive heat, demagnetizing, or mishandling.

### **Equipment Use**

From a public service point of view, locating all of the public access media equipment in one area is best. An area near a service desk with staff on duty full time is ideal. In the past, it was necessary to place microform-reading machines in low-light areas for users to read the screen easily. Today, that is no longer necessary, which makes it reasonable to have a single equipment area. Staffing the area will assure minimal damage to both equipment and the “software” and reduce user frustration. It also means the staff in the area can and should have more knowledge about how all of the equipment works than when it is just one of many public service duties.

### **Government Information**

Government information has a very long history man from its civilization used government information and need the access to government documents, government publications, public documents or one of several other variants. Today there is no doubt the proper title is government information. Internet and other electronic means of access and distribution make it clear that terms such as document and publication, in the traditional print on paper meaning, are less and less appropriate. All types of libraries acquire some kinds of government information. Without question governments ae the world’s number one producers of information and publications.

Defining what is government information is not always easy. Are reports prepared by nongovernmental agencies, but required by a government agency, government publications? Historically at some point, is small steps, the government decided that citizens needed easy access not only to information about government activities, but also to information that would improve the economy or enhance daily living.

## **Philosophy of Library Government Information Service**

Today there is a debate about what information should be available and the debate can and has had some impact on public service staff. Access to scientific and technical information, provided by the central/federal government is one such focal point of debate. The government discussed and to some extent acted to limit access to its information, particularly scientific and technical material.

Many people, including most librarians, think complete freedom of access to unclassified government information is vital to scholarship and to the well-being of society. Others think that access to scientific, but unclassified, information leads to increased security risks for the country. A few people even suggest that “the individual abstracts or references in government and commercial databases are unclassified, but some of the information taken in aggregate, many reveal sensitive information concerns. How has the debate affected public service staff in libraries? One way is that the security concerns and the government’s desire to reduce the volume of government information have resulted in a small decline in the amount of material the staff must handle.

From the library perspective, government publications still provide a means of inexpensively expanding a collection. Given the range and content of government information packages, all types of libraries can acquire useful authoritative materials at minimal cost. Free unrestricted access is the cornerstone of library public service programs, at least for the library’s primary service population. In the case of information depository libraries, there is a legal requirement that the documents collection be open to all persons, not just the primary service population. Thus, privately funded libraries that have depository status must allow anyone to come in and use the government material, even if the library limits access to its other collections. This requirement can create some problems for public service staff, especially if the library requires the user to show a valid identification card to enter the library.

Lacking that practice, the library may decide to escort such individuals to and from the government documents area. Staff operating the entrance control desk must understand that they must admit anyone requesting access to the depository collection. Most private institutions that have depository status do not attempt to monitor entrance and in-house use of the collection. Staff members who work regularly with government information also believe that better and more use of government material would benefit most library users. They believe that if individuals understood the broad range of information

and subjects available, usage would increase. Two factors work against increased usage. In depository collections the lack of full cataloging for all received items means customers interested in using such items cannot use the library's public catalog to identify specific items. The high volume of material received is a major factor in not fully cataloging depository items. Even though the items in the Monthly Catalog are now being listed in OCLC, the size of uncatalogued older collections keeps the old uncatalogued system in place. If depository items are not fully cataloged, libraries usually setup a separate area to house the items. Frequently the government documents room is in a corner or basement of the library with a low volume of traffic. The old saying "out of sight, out of mind" is all too true about government documents.

It is incumbent upon the public service staff to remind users about the potential value of using government information. Unfortunately, this is sometimes not done. This forgetfulness is not only because of the location of the material but also due to the difficulty in identifying appropriate material, both print and electronic.

Reference service in this "new age" of electronic government information presents some challenges for the staff. There is much to learn about the idiosyncrasies of the various agency databases and websites, even in terms of such basics as how to search, display, and print/download. Also some agencies provide different or more information in the electronic format than they did/do in the print version. The result is that the user must remember which version supplies this or that type of information.

Library staff must struggle to learn the new and seemingly endless changing formats. The library must address equipment issues, for example multiple disc CD-ROM products that really require the availability of all the disks on a tower to assure complete or at least somewhat efficient searching. Moving to web-based product will reduce the CD tower cost but will generate greater computer cost as more and more graphics are added to the products, meaning that low-end machines result in user complaints.

## **Types of Government Information**

### **Federal Information**

All branches of the federal government/central government (executive, judicial and legislative) produce prodigious quantities of information. In addition, independent government agencies contribute their share of material to the pool of federal information. When the public services staff is aware of the variety of information contained in federal information sources,

especially those that are not reporting on government activities, they can direct the public to these useful sources. All types of libraries can find some useful material for patrons in the annual pool of federal publications. Even at higher prices these materials not only enrich the collection but also help stretch the collection development funds. The extra material in turn will benefit the individual and the institution or community being served.

### **State/Province Information**

Several differences exist between state and federal information. One difference is that there is still a very strong print orientation at the state level. Certainly, there is a movement to have more and more state information available through the web. Presently, most of provinces are going towards online provision of services and government information. Very few states produce audiovisual materials, which means state publication or information refers to textual material, whether printed, mimeographed, or occasionally in microformat or some type of electronic format. A second and often overlooked difference is that states can and frequently do copyright their publications. Some shared characteristics between state and federal information are diversity of subject matter, relatively low purchase price, and increasing difficulty in identifying what is an official publication.

Many users, including librarians, believe that state publications are public domain (not copyrighted) items, similar to federal publications. Like the federal publishing program, most state programs now produce materials mandated by law; that is, they record government activities and release a variety of statistical data and general information about the state. Many of the federal statistical publications are compilations of state data, which means the most current information, by as much as two or three years, is in the state publications.

Access to electronic state information is often difficult because state information is varied as it is for federal agencies. In terms of websites, some states have well organized and coordinated home pages. States and local governments tend to take greater advantage of the web's interactive and graphic potential than does the federal government. In terms of physical access, most states have established a depository law similar to the federal system, but often this system only applies to in-state libraries and archival centers. Some states allow receiving libraries to select what they want, while other states require the library to take everything if it wants depository status. Acquiring materials as a non-depository can be frustrating and time consuming because not all states have central documents distribution center.

### **Local Government Publications**

Collecting local document is something almost all public and academic libraries do, if not through intent, then by serendipity. Even if there is nothing about acquiring local documents in the library's collection development policy, local governments often view the library as a distribution mechanism. A better approach is to plan on collecting local documents as they are often high-interest items for the community. One consideration in planning is the retention policy: How long should the library retain such documents? Collecting and retaining the local city and perhaps division documents is reasonable for central public library and perhaps one local academic or public/municipal library. Collecting from more than two or three local governments becomes expensive in terms of staff time.

Normally the public learns about local government publications through newspaper articles and/or local news broadcasts, not from indexes.

### **International Documents**

National governments in almost every country issue at least a few publications each year and a great many now have Internet sites. In many countries, the government publication program equals the U.S. program in volume and complexity. International documents, especially U.N. publications, however, do have a wider appeal. The major sources of international publications/information are intergovernmental organizations (IGOs). The usual definition of an IGO is a group of three or more member countries working together on one or more long-term common interests. Without doubt the largest IGO is the United Nations.

There are also nongovernmental organizations (NGOs) such as the World Health Organization (WHO), which issue publications and information of interest to many library users. The United Nations has an extensive publications program, and like other governmental bodies is beginning to issue material in electronic formats. The U.N. Website provides a variety of information about the organization such as the UN Publications Catalogue (<http://www.un.org/pulicataions>), which includes ordering information.

### **Staffing, Public Service and Government Information**

In an integrated collection situation, all public service staff need some training and understanding of government publications. Here, we are assuming the library is a partial depository and receives a substantial number of publications. Obviously, in libraries (non-depository status) that acquire

just a few items per year and handle these items as they do any other collection material no special training is necessary.

When the collections are separate the situation changes. One decision to make is whether the staff responsible for the collections are to be public service only or divided between public and technical services. It is not uncommon for smaller partial depository libraries to divide the duties. In such cases, the receiving and processing work as assigned to technical services; often support staff in a serials unit handle this work. Because of the complexity of indexing and other access tools, a common practice is to assign to a reference librarian the primary responsibility for keeping current with the tools.

With large collections one or more full-time librarians plus support staff usually handle all aspects of document work. Even with a full-time staff in documents, however, there is a need to provide some background and training for the rest of the public service staff. Without such background they are not as likely to refer users to the collection. When a library becomes a federal depository, it takes on certain obligations, including one of having a full-time staff member responsible for the service. This does not mean a full-time documents staff, just a full-time staff member who is responsible for document.

### **Conclusion**

Media is an important source of information and plays an important role in any library's service program. The entire public service staff needs to understand the role and now view media services as a stepchild to other services or as an unreasonable burden on staff time. Access, storage, and organization of media sources need careful attention it needs proper training of library staff. The library should have enough budget, space, and other resources to manage media collections.

Government documents are excellent, inexpensive, often free, publications that can help build a useful collection for users. They come in almost all formats from all levels of government, making them a challenge to track down, acquire, and preserve. Because of their diverse sources, structure, and content they do require extra time and attention to exploit fully their value and information. All types of libraries can and should include them in the collection and actively promote their use.

### **Self-assessment Questions**

1. What role do media play in public service programs? Discuss the common problems for media use.
2. Films and videocassettes present some special problems for the staff. What are these problems?
3. What are some of the characteristics of government publications that make them useful in a library's collections?
4. What are the major type of government publications? Describe the concept of depository library and the implications of being a depository library.

### **Activity**

Visit the nearby public library or any archival center and prepare a list of government publication available there and with the help of deputed staff prepare and organization plan of these publications.

### **Recommended readings**

Garvin, P. (2016). Government information management in the 21<sup>st</sup> century: International perspectives. London: Routledge.

Caro, S. (2018). Government information essentials. Chicago: American Library Association.

Burton, F., & Barlen, P. (2012). Official discourse: on discourse analysis, government publications, ideology, and the state. London: Routledge et Kegan Paul.

Landsbergen, D., & Wolken, G. (2001). Realizing the promise: government information systems and the fourth generation of information technology. *Public Administration Review* 61(2): 206-220.

Whitson, T. L., & Davis, L. (2001). Best practices in electronic government: Comprehensive electronic information dissemination for science and technology. *Government Information Quarterly* 18(2): 79-91.

Huang, W., Siau, K., & Wei, K. K. (2004). Electronic government strategies and implementation. London: Idea Group Publishing.

Fang, Z. (2002). E-government in digital era: Concept, practice and development. *International Journal of the Computer, the Internet and Management* 10(2): 1-22.

Dawes, S. S., Pardo, T. A., & Cresswell, A. M. (2004). Designing electronic government information access programs: A holistic approach. *Government Information Quarterly* 21(1): 3-23.