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Building the competitive edge: a handbook for starting a corporate library

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**BUILDING THE COMPETITIVE EDGE:
A HANDBOOK FOR STARTING A CORPORATE LIBRARY**

A Project Report

Presented to

The Faculty of the School of Library and Information Science

San Jose State University

In Partial Fulfillment

**Of the Requirements for the Degree
Master of Library and Information Science**

by

Sarah Elizabeth Way

August 1999

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ABSTRACT

BUILDING THE COMPETITIVE EDGE: A HANDBOOK FOR STARTING A CORPORATE LIBRARY

By Sarah Elizabeth Way

This project produced a manual entitled *Building the Competitive Edge: A Handbook for Starting a Corporate Library*. The handbook is designed to assist the librarian in the planning, organization, and implementation of a corporate information facility. It discusses the fundamental tasks required in establishing a library, including assessing current assets, utilizing space effectively, determining user needs, developing a collection development policy, defining the “ideal” collection, preparing a budget, selecting a vendor, determining a catalog or organizational system, cataloging, proving user services, connecting outside the library walls, marketing, and ongoing library management.

Current literature is very thin in the area of library creation. The majority of the research available centers on expanding existing collections. As such, the first-time founding librarian may be unable to locate a concise source for information. The handbook produced by this project meets those needs by addressing each area of library formulation.

DEDICATION

This thesis project is dedicated to the memory of Robert Hill, my grandfather who served as a manuscript librarian for the New York Public Library for his entire career. In addition, it is dedicated to the seven other librarians in my family tree.

I would like to thank my committee chair, Dr. Debra Hansen, as well as committee members, Dr. Nancy Burns and Sue Brewsaugh, of Boeing's library. Their assistance and encouragement has been invaluable.

Additional thanks are owed to Hannah who endured hours in the stroller while mommy searched the stacks and photocopied and who graciously understood that mommy's books could not be colored in. Additional thanks to my loving husband, Scott, for all the support and understanding.

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INTRODUCTION

In the modern "Information Age," the role of the library has expanded beyond that of just the large academic or public facility. The corporate library is becoming more pervasive. Companies are beginning to recognize the role that access to information plays in the fiscal success of their company. "In this age of information creation and access, the special librarian, as an information specialist, is an essential member of any organizational team" (Stowe, 1997, p. 9). In a recent report by the San Diego chapter of the Special Libraries Association, public relations chair Karen Sharpe found that there were 95 local companies just in the biomedical field that would benefit from creating a corporate library. And, in fact, the day the report was published, she was contacted by one of the firms for information on how to create one (p. 9).

The current movement toward establishing libraries or information centers in the corporate environment is due to one main factor: companies are beginning to recognize information as a valuable asset to their fiscal success. "Companies today must operate in an increasingly competitive corporate environment. The constant changes and innovations in information technology are major influences on an organization's ability to stand out and succeed in the global marketplace" (Diamond, 1998, p. 82). "In the information age, research libraries are becoming even more strategic as assets not only to companies, but communities" (Keller, 1998, p. 24). Information centers are being created to fulfill this increased need for information. It is not always feasible to send an employee to the local library. In addition, a company's information needs are often very specific and cannot always be met with local resources. As such, many are deciding that

it is to the company's advantage to create an in-house library or information center. This way staff's information needs can be satisfied immediately. In addition, onsite centers are able to retain company-sensitive material that may have confidentiality issues. This type of information, such as corporate counterintelligence or future strategic plans, can now be available without staff ever leaving the confines of the library.

In looking at the statistics in the State of California alone, 265 new special libraries were opened during 1995 (Starr, 1995, p. 3). The *California Library Statistics 1995* reports that \$60,723,000 was spent in total operating expenditures for special libraries in 1995 (Starr, 1995, p. 5). More recently, the number of special libraries, excluding public, academic, armed forces and government collections, was reported at 10,282 in 1997. This compares to 8,198 academic libraries in the same period (Bogart, 1997, p. 426). Special library facilities are fast becoming a large portion of the total number of library facilities. Clearly, special libraries and information centers are becoming a part of business today. Companies are spending a good deal of money to house and organize their information.

Even given the numbers, there is still very little information currently available to assist in the process of setting up a new information facility. The initial phase of library organization and management is crucial to the future success of the facility. Whether it will be called an "Information Center", or "Reference Center", or even "Library".

The laying of the foundation is crucial. "Superior libraries indeed improve the overall well being of the citizens they serve, but in the competitive commercial world, a superior library can also bring untold value to a business. A good research library can

increase the intellectual capital of a company and add value for all stakeholders” (Keller, 1998, p. 24). As with any project, “superior” status does not just occur, it takes planning and action. Creating an effective and useful library facility means much more than just placing books on a shelf in a given order. It requires careful planning. “Organizing a library can be one of the most rewarding experiences an individual can ever have, since the resources and services the library offers will be of continuing benefit to the library’s users. However, it can also be a frustrating and disappointing experience without proper planning” (Sager, 1992, p. 5).

The idea of creating a concise source for information on the founding of a new library was born out of personal necessity. In the process of assisting in the planning of several libraries, it became clear that very little information on the task as a whole was available. Through discussion with other librarians active in the Special Libraries Association, it became clear that they, too, would benefit from such a resource. The idea was proposed to create a handbook designed to assist the first-time founding librarian. The intended audience is not the novice to the library profession, but rather the novice to designing a new facility from the ground up. Even if the librarian has had experience with libraries, it is probable that he or she has never started a library from scratch before. The handbook would help break down the process into more manageable steps and provide a map to the buried treasure of information accessibility.

The purpose of this project, then, was to create a step-by-step guide for creating a new and successful corporate information facility. These steps are: assessing current collection and other assets, using space effectively, determining user needs, creating a

collection development policy, defining the “ideal” collection for the library’s environment, preparing a budget, researching a vendor, deciding on a catalog or organizational system, cataloging materials, providing user services, connecting to information sources outside the walls of the library, marketing of library services, and ongoing library management. All of this information is divided into five broad sections that represent larger milestones in the process of creating a new information facility. These milestones are: assessing what is currently available, assessing what is needed, getting what is needed, organizing it all, and, lastly, getting it to the user.

A chapter is devoted to each step in the process. Each chapter opens with an abstract of the information to be covered. This is followed by a list of key terms with definitions that will be presented in that chapter. The chapters conclude with suggestions for further readings on the information covered within. This will allow the users to easily locate more detailed information on areas they desire to learn more about.

Building the Competitive Edge: A Handbook for Starting a Corporate Library is designed to present the necessary information to the user in an accessible and absorbable manner. The above-mentioned steps are clearly outlined allowing the user to quickly access information on specific areas or use the handbook as a map for the entire process. Each chapter is written so that it may be used on its own for those users wanting information on one specific area such as cataloging, while not requiring them to use the entire text. This will make the handbook a useful asset to corporate libraries in all stages of development, even those that are already up and running.

The process of creating a new library is an exciting one, but it can also be frustrating when the needed information is not available. While the field of corporate librarianship is expanding exponentially, at this point the literature available has not caught up with the need. There is very little information available on how to start a library from scratch. Most sources assume that the library already exists. But establishing effective library procedures from the start will play a large part in the success of the corporate library itself. The handbook resulting from this project will assist its user in the planning required to create a library that will be an asset to the organization in which it exists.

LITERATURE REVIEW

The initial phase of creating a new library facility can seem overwhelming. There is a real need for guidance and information on the most effective process by which to begin setting up the corporate library. In reviewing the available literature on how to set up a corporate library, there appears to be a great void in the information available. It became necessary to broaden the search to guides to setting up any library. This strategy was effective in yielding good results. The information found has been organized by format, beginning with existing guides, then texts on specific areas of library management, followed by articles on corporate library facilities and existing consulting services.

Guides

Setting Up A Library: How to Begin, or Begin Again by Ruth Smith (1994) is only available through the Church and Synagogue Library Association (CSLA). This text is based on eleven steps to starting a library. They include: begin with a purpose, be prepared, obtain approval, organize a library committee, staff the library, survey your assets, establish basic policies, develop action plans, carry out the plan, provide for continuity, and stretch your horizons (Smith, 1994). Each step is described briefly in a one-page format. The simplified breakdown is an effective way to clarify the process of beginning a library.

This guide is specific to the task of creating a church or synagogue library and misses some points that are key in a corporate library, such as documentation of fiscal worth, just to name one. For example, under “Be prepared” the text lists knowledge of the tenets of the church's faith as the first step (Smith, 1994, p. 2). Obviously, this would not be part of the corporate structure. As mentioned previously, this is not an easy text to locate. It requires a long distance phone call to Portland and use of a credit card to order.

Maryann Dotts's *The Church Resource Library: How to Start It and Make It Grow* (1975) does not assume any particular knowledge base other than a genuine interest in the success of the library the reader is about to create. This text covers the basics of how to begin to get items on the shelf, even with a very small budget. It includes sections on defining what the purpose of the library will be, how to start a simple but expandable selection policy, and how to begin cataloging items (Dotts, 1975). One major weakness of this guide is that it was written more than twenty years ago. There is no discussion of automation or making use of the Internet. In fact, a great deal of the text is devoted to how to type up catalog cards. Dotts includes a basic guideline of subject headings and the Dewey classification system. Here the specificity of the text shows, as the 200 Dewey call number range for religion is expanded and shown in great detail while other areas have only the most basic numbering. In addition, in a corporate library where the subject area may be very narrow, Dewey may not be the most effective classification system. In order for each book to have distinctive labeling each Dewey number would become very long and thus difficult to read.

Additional manuals on starting particular areas of a collection rather than an entire library are available. One such text is Elizabeth Yakel's (1994) *Starting an Archives*. The text shows examples of three existing collections and then moves into suggestions on planning, administration, collection development, reference services, and outreach. Though the manual centers on adding an archival collection, it includes some very useful sections such as samples of user registration forms and an outline of a procedures manual.

The County of Orange produced another archives manual. This policy manual published in 1987 outlines the procedures by which the county established its archival collection. The purpose and scope of the manual are clearly defined as containing the "procedures, policies, forms and information resources which were either used during, or arose as a result of the development and implementation of the Orange County Archives Program" (Carey, 1987, p. 1). And though this may seem very project specific, the manual contains universally useful information such as an example of a work plan timeline. The text defines goals to be completed in the first year as well as the second and third. This precise plan allows for clear assessment of progress on the project. This type of timeline would be very useful in any start-up project, be it public or corporate.

In focusing the search on more "how to" manuals, several guides to beginning specific collections were found. One such text is Edith and Meir Lubetski's (1983) *Building a Judaica Library Collection, a Resource Guide*. This guide is centered on adding a collection to an existing library and outlines a clear process for the selection of topic-specific items (Lubetski & Lubetski, 1983).

A similar guide is Myra Nadles's (1978) *How to Start an Audiovisual Collection*. This text deals with adding a specific collection to an existing library. However, it does deal with how to create a collection development policy and offers useful suggestions in the area of evaluation. Where this source falls short is its assumption of the knowledge base of the reader. It states, "All librarians are trained in general principles of evaluation. Therefore no master list of guidelines needs be given here" (Nadles, 1978, p. 17). This is assuming a knowledge level that may not exist in the reader or at the least greatly limits the intended audience for the text. In addition, this text is grossly out of date in the areas of automation and technology. It should be said, however, that this is one of the only texts to include a glossary, a very useful item.

Texts on Specific Areas of Library Planning

Even given the quality of those sources already reviewed, it became necessary to broaden the search to guides for developing libraries in general. The obvious first item on this topic is Edward Evans's (1995) *Developing Library and Information Centers*. This text has highly valuable sections on needs assessment, a key procedure in the process of setting up any library. It asks key questions such as "Why a person does or does not use a particular service? How the person uses the product or service? What is good or bad about the product or service?" (Evans, 1995, p. 39). It includes a sample survey for assessing your users' needs (p. 65). This source includes detailed data on collection development policies, addressing topics such as selection, deselection, and retention. There is a very useful section on basic copyright law. All of this would seem to make it a very useful source, however it is a very academic text. It is not a "how-to

guide.” It does not offer suggestions for action or give the reader an idea of how to accomplish the goals set within the text.

A highly recognized, authoritative text on the subject of special libraries in general is Ellis Mount’s (1995) *Special Libraries and Information Centers: An Introductory Text*. Mount covers topics such as management techniques, user services, technical services, facility planing, networking, serials, and software (Mount, 1995). It is a very effective text for studying the management of a special library that is already up and running. However, as with many of the sources, the text assumes that the library is already established. It lacks discussions on what it takes to plan the beginning stages of the facility. Nonetheless, it is a text that should be consulted by any special librarian.

Another effective reference is Donald Sager’s (1992) *Small Libraries: Organization and Operation*. This thin soft-cover text addresses most aspects of running a small special library, including ordering library materials, processing and lending library materials, designing an attractive and efficient library, and serving its users (Sager, 1992). Sager includes a very useful list of library associations, as well as a sample interlibrary loan form. A weakness in this text is that Sager tends to oversimplify basic tasks while glossing over more complicated ones. For example, the author devotes three pages on how to type out a library catalog card to exacting specifications yet covers budgets in a mere four paragraphs.

A promising text entitled simply *Essentials of Library Planning* by K. A. Lodewycks (1961) centers on building a whole new facility, primarily the larger library such as an academic or large public library. Most likely a corporate library will be

housed in a large office, with little opportunity for architectural features such as vaulted ceilings. In further reading of the text there is a very useful section on starting from scratch and planning for traffic areas, storage, and central service workspaces.

Effective planning and use of space is key in the initial phases of planning a library facility. *Essentials of Library Planning* gives formulas for figuring storage capacity and shelving. It advises shelf spacing in heavy use areas, allowing for aisles of a minimum of three-foot width. Suggestions are made to use partitioning to minimize sound pollution (Lodewycks, 1961). In this text there is a conspicuous lack of mention of technology; in fact the author stresses the need for telephones in the library!

Nolan Lushington and W. N. Mill's (1979) *Libraries Designed for Users: A Planning Handbook* is a nice source for planning the large library, though it centers on the academic or central public library. The text suggests hiring a library consultant, where the corporate library may not have such an option. This source does offer an informative section on community analysis. It suggests questions such as "Who are the people using the library? What do they do for business? What do other community agencies do? What other agencies meet the community's information needs? What are the community's wants and needs for information services?" (Lushington & Mills, 1979, p. 41). In addition, the authors specify community characteristics that should be examined such as "transportation patterns, organizations likely to affect library usage, patterns of employment, political framework the library functions within, level of education within the community, and any past statistics on library usage patterns" (p. 42).

A strength of this text is its emphasis on the need for support from the larger institution as key to the success of the library.

Another good space-planning guide is Aaron and Elaine Cohen's (1979) *Designing and Space Planning for Libraries: a Behavioral Guide*. This text looks at aspects of the library's space and how it affects the user. This is a very useful idea when creating a library floor plan. The text describes itself as a survey of the many different elements that go into setting up a library facility, from beginning to end (Cohen & Cohen, 1979). As far as space planning goes, this holds true; however, the text does not touch on "how to" besides what fills the space. There is no discussion of informational needs assessment or boosting usage. If it were truly a text on all aspects of setting up a library it would need those items. The Cohens include many very useful topics such as lighting needed and floor load requirements—a must if your library will be anywhere other than the ground floor. The authors further include charts of standard shelf spacing and power requirements, though as the text was written in 1979 the outlet requirement would now be inadequate. As with many of the previous texts, this planning guide was intended for use by the large institution planning to build a free-standing library structure. Very few corporations head in that direction.

Donald Riggs's (1984) *Strategic Planning for Library Managers* emphasizes planning for the future of an already existing library. Even given that, there are some very useful aspects of the text, such as stressing the need for a planning manual (Riggs, 1984, p. 23). The author suggests that the reader write one of their own, not very practical if you are not extremely familiar with libraries. But the general position of the

text is one that every library manager should keep in mind: that it is hard to reach a goal if you are unsure what the goal is. As such, it is crucial to have a well-thought-out idea of what the goals for the library are. Riggs's book is a good place for anyone setting up a library to start. In addition he stresses a key point in the entire process, the need for support from the larger institution. This text also has a very good explanation of the process of library self-analysis and performance evaluation. However, this type of analysis can not begin until the library is already serving users. It should be mentioned that Riggs does include a fairly comprehensive glossary of library terminology. In general, this text is more theoretical than a library setup guide should be.

A very effective text on a specific area of library management is *Planning for Automation*, by J. M. Cohn, L. A. Kelsey, and K. M. Fiels (1997). Texts in the area of technology are quickly outdated, but this one does a good job of remaining general enough to communicate effectively without dating itself. Cohn discusses the need to build your technology into your space plan. He briefly discusses the pros and cons of designated ISDN lines as well as comparing networked systems to free-standing PCs (Cohn et al., 1997). This text does very well in covering a very narrow area of library creation.

Creating a collection development policy is made easier after reading E. Futas' (1995) *Collection Development Policies and Procedures*. The author covers purchasing materials, creating selection criteria, agreements with other libraries, and preservation of the library collection (Futas, 1995). The text stresses the issue of how to provide the

highest level of service at the lowest cost to the library, a needed skill as budgets are cut. The text includes examples of actual policies from a variety of sources.

The area of serials management is of concern to all library managers. N. Bernard Basch and Judy McQueen (1991) cover it rather well in a user-friendly text entitled *Buying Serials: A How to Do It Manual for Librarians*. Published by the same house as the previous text, it is presented in an easy to follow format. This text delves into the realm of contracting with subscription houses, as well as other complications of periodicals in libraries in this increasingly digital age (Basch & McQueen, 1991). The only weakness of the text is that at the age of eight, it will soon be out of date regarding electronic serials.

Another very useful, while very specific text is L. A. Wolfe's (1997) *Library Public Relations, Promotions, and Communications*. Wolfe covers marketing library services for the non-marketing executive. A very effective section is included on business communication. This is a skill that is underrated. Wolfe stresses the point that the manner in which the library is presented in its communications and promotions is how it will be perceived. Professional tone and manner, therefore, become very important. The information within this text will be of particular use to the librarian who is entering the corporate environment for the first time.

B. R. Blake and B. L. Stein co-authored a very user-friendly text on designing marketing materials. *Creating Newsletters, Brochures, and Pamphlets* (1992) is part of the "How-To-Do-It for Librarian's" series by Neal-Schuman publishers. This text is a good starting place for the librarian new to the field of designing their own marketing

material. An older text by M. S. Edsall, entitled *Library Promotion Handbook* (1980) does a fairly good job of covering the basics of marketing strategies for libraries. However, as an older text it does not cover areas such as making use of desktop publishing software. For more current information, readers should use the Blake and Stein text.

With all of the texts on specific areas of library management, their weaknesses are the same. Many of them are quite lengthy, with key information buried deep within. In addition, these texts are not available at many sources. After much searching, they were finally located at a research library with an extensive collection in the library sciences. In fact, the text by L. A. Wolfe had to be special-ordered up from an annexed location by a faculty member. Needless to say, most corporate librarians would not have access to these texts.

Articles

A recent article in *MLS Marketing Library Service* (Katz, 1998) was directly on point to the subject of creating a new corporate information facility. "MasterCard Opens a Corporate Library", by Trudy Katz, gives a brief explanation of the process that MasterCard underwent to open their information center. Katz mentions how the library negotiated for space and stresses the importance of open communication with other departments and senior staff. The main emphasis of this article is how MasterCard marketed the new facility internally. While this article contains very useful information, it would be impossible for the author to go into the depth needed to fully explain the process in the three pages allotted. The detail needed to clearly explain the process of

creating a new facility can only be achieved in the more lengthy manual or guidebook format.

Information Today, while not a traditional library journal, recently included an article of particular interest. "Enhancing Competitiveness in the Information Age: Strategies and Tactics for Special Librarians and Information Professionals" (Diamond, 1998) expounded the advantages of having an on-site library facility in the corporate world. However, the author, R. L. Diamond progressed on the assumption that the facility already existed and offered suggestions on topics such as expanded competitive intelligence searches that might be well beyond the current information needs of a founding librarian.

A similarly advanced article entitled "Libraries Dress Up for the Digital Age" by M. Keller, was published in *Minneapolis City Business* (Keller, 1998). While this article included very good information on the area of electronic access to full-text information, it offered little insight on how a library would best plan to implement such a system.

Beyond the text mentioned above on the topic of collection development policies, M. J. Bostic's article "A Written Collection Development Policy: To Have or Have Not" was published in *Collection Management* (Bostic, 1988). In this the author discusses the reasons for having a collection development policy and keeping it current (Bostic, 1988).

Several articles have been published recently on the issue of charging for library services in the corporate environment. "The User Pays: Cost Billing in a Company Library" appeared in the Spring 1995 issue of *Special Libraries* (Grotenhius & Heijnekamp, 1995). In the Winter 1995 issue of the same journal, "Three Years

Experience with Fee-Based Services in a Corporate Library” (Ratliff & Weeks, 1995) was published. Both articles were extremely informative regarding the issue of charging back. In both articles, after detailing their positive and negative experiences, the authors leave it up to the reader to evaluate their situation and determine whether or not charging for services would be worth the added work to implement. Both articles should be included in a new librarian’s list of “must reads.”

Beyond the issue of who pays for services, two additional articles are available on what services can be offered to better serve library users. J. Stowe authored "Got a Niche- Scratch It!" in *Information Outlook* (Stowe, 1997). This article discusses how to go about meeting those small "niche" needs. Stowe classifies these as the very specific information needs that are often overlooked in larger collections (Stowe, 1997). A possible way to meet those needs is through the use of document delivery. M. Khalil (1993) discusses the current options available in the document delivery market in the February 1, 1993 issue of *Library Journal*. "Document Delivery: A Better Option" does a good job of covering various methods of obtaining articles that are not available with a library's current collection.

Consultation Services

The Special Libraries Association (SLA) offers a packet of suggestions for starting a new library or information facility. This packet contains a copy of the current SLA directory as well as the most recent issue of *Information Outlook*, the monthly magazine of the Special Libraries Association. They also include a handout on making use of the SLA Consultation Service. This service provides the requester with a free half-

day, one-on-one meeting with a local SLA member. During this meeting the librarian will discuss the strategic issues of planning a new facility. The consultant will refer you to sources for additional consultants who are also members of SLA, the majority of whom hold a Master of Library Science from an American Library Association accredited school.

The packet also contains a list of current titles available via the SLA bookstore. These titles include texts on specific areas of operation such as budget preparation, business communication, and text selection. While some of the handouts in the packet are very useful, the majority of the information seems to be a pitch to urge the facility to hire a library consultant. With all of this comes “rolodex-ready” cards with information on how to contact SLA. This consultation service is a wonderful resource that the project handbook suggests be utilized. However, it is just a one-time meeting. If the organization does not opt to employ a library consultant to oversee the complete process of establishing the new library facility, whomever is given the task is going to need more assistance than just a one-time consultation.

In conclusion, there are good resources on individual areas of library management, but nowhere has all of this information been pulled together into a concise and clear resource. There is literature available on some steps of the library set-up process, but all assume that the library already exists. Most texts currently available are more theoretical and academic in nature rather than serving as an effective user guide. This project then has created a handbook that brings together the most useful elements

covered in many of the available resources and synthesizes them into a more timely and accessible guide.

METHODOLOGY

This project produced a manual for creating a new corporate library from the ground up. The manual will be published as a soft-cover text. It was designed to assist the first-time founding librarian. The process was completed in four stages: conceptualization, research, writing and design of format, and evaluation and revision.

Conceptualization

Experience in the corporate arena is crucial to understanding what makes a corporate library different from any other special library. In the corporate environment, the timeline of expected completion is very different from the semester-oriented academic world and the overworked public library. Justification is the key to success in the corporate setting. The library must always be prepared to show on paper its fiscal contribution to the well-being of the company as a whole. This could mean tracking cost analysis, charging back to individual departments, or any number of other tasks. These are decisions that must be made given the nature of the surroundings in which the library seeks to thrive. The idea that information is more than intrinsically valuable, but fiscally valuable as well, is often more obvious in the corporate setting. Information and data are the library's product, and the style of presentation and delivery of that product are tantamount to the success of the library. These and other differences can make the process of creating a new corporate library complicated.

In planning to write a manual for creating a new library facility, the idea of how to best present the material took a great deal of thought. Most current library literature is

written in an academic tone. This does not necessarily fit the learning style of the corporate environment. As such, it was the goal of this project to present the information in a more user-friendly and accessible manner. The “handbook” format lent itself to those goals. The text is written in the first person, so as to best convey the idea of communication between the author of the handbook and the librarian using it. An example of a similar and very successful series of handbooks are the *For Dummies* manuals. These texts include *DOS for Dummies*, *Windows for Dummies*, and *Internet for Dummies*. Manuals such as these all take highly technical subjects and make them accessible to the user through the use of first-person language, charts and graphics, and a bit of humor. These became a model from which to begin, but by no means were they the ending point of format development.

The process of planning the handbook began by reviewing major areas of library management, such as material selection, cataloging, use of space, and budgeting. These were all areas that must be addressed in order for the handbook to be useful to new founding librarians. The most difficult part of the process was determining how to turn what is essentially a circular process into a linear handbook. Another debate arose over the issue of how much detail to cover in regards to digital technologies. Today corporate libraries run the gamut from using a card catalog to being completely digital. In seeking to serve the largest group of users, it was decided that the handbook should strive to remain in the middle of the spectrum. This was reinforced by the fact that texts that discuss new technologies in great detail are often outdated before they go to print.

Beyond discussion of what should and should not be included in the text, detailed research into authoritative sources for information on individual areas of running a library would have to take place before a concrete layout for the handbook could be decided upon.

Research

The best source of information on the topic of creating a new information facility are those who have already completed such a task. Much of the intellectual work is original to the author and other founding librarians. Their expertise and hands-on knowledge was invaluable in making this guide an effective tool. To that end, several founding librarians agreed to be interviewed regarding their experiences in creating a new library facility.

The use of these interviews in this project conforms to the university's use of human subjects policy. This policy states that "There is no human subject involvement when people are being asked to provide information or act as a source of information about their organization, profession or community as a function of their job, profession or standing in the community" ("Policy for Protection of Human Research Subjects," 1990, p. 4). Clearly, the interviewing of corporate librarians regarding the process by which they founded their library facilities falls well within the university guidelines.

The founding librarians interviewed included Trudy Katz of the newly founded MasterCard corporate library in New York, Kim Laru of the San Diego County Water Authority Library, John Grant of Quintiles Transnational in Edinburgh, Scotland, and Kim Abbey of Sony Corporation. Included in appendix A is a sample of an interview

form that served as a starting point for discussion. The form covers items such as how the librarians obtained a budget, how they chose a vendor, and other key questions. It should be clearly understood that these interview questions served as merely a starting point for our conversations, not as a strict interview form.

Information was first gathered on the type of environment in which the librarian worked. Each was asked their position title. John Grant is an “Information Specialist.” Kim Laru’s title is “Librarian” as is Kim Abbey’s. Trudy Katz’s position is entitled “Library Manager.” The form then asks the length of the librarians’ employment with the company. John Grant has been with Quintiles for three years; however he founded the library six years ago for another company. That company was then purchased by Quintiles, who decided to retain the library exactly as they had found it (John Grant, personal communication, September 18, 1998). Kim Laru has been with the San Diego Water Authority for nearly seven years (Kim Laru, personal communication, November 8, 1998). Kim Abbey is new to her position at Sony Corporation, having been hired within the last year (Kim Abbey, personal communication, January 7, 1999). Trudy Katz was hired by MasterCard in mid-1996 (Trudy Katz, personal communication, July 15, 1998).

The interviewees were then asked about the staffing of their facilities. Two of the libraries are run by solo librarians—Kim Abbey and Kim Laru—the other two have larger staffs, with Quintiles Transnational having the largest staff of eight full-time librarians. Trudy Katz was hired as a second librarian. After the completion of the set-up process, other staff was hired (Trudy Katz, personal communication, July 15, 1998).

All of the libraries covered served the entire institution, rather than just one department. The facilities served user groups from between 250 and 700 staff members. The interviews then moved to ascertaining the condition of the library when the interviewee was first contacted. In all cases, with the exception of one (the MasterCard facility) the company had stated that the library already existed, however what passed as a library was usually a large storage facility for texts. Trudy Katz was contacted after another library consultant had already begun the process. She was brought in approximately six months into that process. Katz stated that unfortunately no written record was kept of the steps taken within the first year of organization (Trudy Katz, personal communication, July 15, 1998). In some of the other libraries, parts of the collections were cataloged. Most were not. In the case of Quintiles, the local staff had no idea what was available within the library. In fact, the company had been paying for document delivery for items already housed on their library shelves (John Grant, personal communication, September 18, 1998). Abbey and Laru basically started their libraries from scratch.

The librarians were then asked if a collection development policy had been in place prior to their arrival. In all cases the answer was no. The discussions then moved on to how a plan of action was established. Most concurred with Trudy Katz that no record had been kept of the establishment process. Since this was the first time any of them had been involved in the founding of a new library facility, many expressed frustration at being unable to find a resource guide. "We went on trial and error. I think a lot of time was spent reworking things that might have gone better if we had had a clear

view of the bigger picture" (Kim Abbey, personal communication, January 7, 1999). The general consensus was that a plan of action was visible in hindsight, but had not been clearly established prior to beginning the process.

Barring any formal plan, each librarian was asked to discuss the steps they went through in the creation of their library facility, beginning with the first step. All of the librarians agreed that the first logical step was to assess the state of any collection already onsite. "I found that there were a lot of mini-libraries already in existence. The hard part was getting people to let the library house all of the material they had collected" (John Grant, personal communication, December 15, 1998). Several of the references cited also suggested seeking out material already available onsite (Sager, 1992). This would prevent any future duplication of materials. The interviews then moved on to subsequent actions. All responded with a very similar series of steps that became the structure of the resulting handbook.

After assessing the current collection, the librarians moved on to determining the needs of their community or user-base. Most of the librarians did this through the use of surveys, however Kim Laru stated that surveys had never been effective for her. Rather, she uses personal discussions and face-to-face interviewing with various managers as a way to gauge user needs as well as build recognition of herself and thus the library. This was the beginning of her library marketing. (Kim Laru, personal communication, November 8, 1998)

After assessing what the users needed, the librarians moved on to selecting a source for the materials to be purchased. Some chose on the basis of cost, others chose

on the basis of services provided by the vendors. Kim Abbey of Sony Corporation, chose a vendor that would do the cataloging for her and deliver the books shelf ready. "I am willing to pay for the convenience of not having to do it myself" (Kim Abbey, personal communication, January 7, 1999). While cataloging was already completed for Abbey, the other librarians did their cataloging onsite, choosing to tailor their systems to their individual environments.

Each of the librarians were then asked to discuss their libraries' placement on the larger companies' organizational chart. This is important because placement can often determine the availability of funding. John Grant's facility is listed under "clinical training." This is a heavily funded department, as the World Health Organization and the Federal Drug Administration have strict training requirements from companies that produce human drugs. Placement in this division ensures him continued funding (John Grant, personal communication, September 18, 1998). Both Trudy Katz's and Kim Abbey's facilities are positioned in the information services area of the organizational chart. Kim Laru's facility is tagged onto the human resources division. This placement often requires her to attend department meetings that do not have a high relevancy to what her actual job entails (Kim Laru, personal communication, November 8, 1998).

In the area of moral and financial support, all of the libraries discussed have been extremely fortunate to have strong backing by the parent organization. The libraries have been supported by upper management in both monetary and demonstrative ways. John Grant's facility has been funded to such a level that his library does not charge back to individual departments, even for the costs incurred for document delivery.

When asked how they each obtained their initial budget, most were, frankly unsure. "I was told when I came in what I had to work with. However, if I could justify the expense, the company was usually forthcoming with the needed extra funds" (Trudy Katz, personal communication, July 15, 1998).

When asked about the time frame it took to complete the creation of the library facility, only Trudy Katz had a definitive answer. "Our facility was begun in ten months—from business plan to execution it took nearly one year" (Trudy Katz, personal communication, July 15, 1998). The other librarians felt that they could not specify a date when their facility was complete. "I think it is an ongoing process, one you're never really done with" (Kim Abbey, personal communication, January 7, 1999).

Returning to the interview form, each librarian was asked to discuss their core patrons. As stated above each responded that they serve the entire company, from support staff through upper management. Kim Laru's library even serves the general public, as her organization is a public institution, and she has the only comprehensive collection on water rights and reclamation in San Diego County (Kim Laru, personal communication, November 8, 1998).

The next question asked of the librarians interviewed concerned services offered by their facilities. This discussion included electronic resources as well as defining policies on what level of service they would provide. "My space is very limited. The more things I can deliver at the desktop level, the better. Not to mention that we sometimes serve users that are in other international offices. Electronic delivery is the fastest way to go" (John Grant, personal communication, December 15, 1998).

The level of service each decided to offer varied greatly from library to library. Some decided that they would hand deliver the requested information right to the desk of the user. Others decided that they could not provide that level of service with a small staff and opted not to start something that could not be maintained. "Having to remove a service because you can't keep up with it is not a good way to gain support" (Kim Abbey, personal communication, January 7, 1999).

In listing the technologies used onsite, all agreed that use of an electronic table of contents routing service was extremely valuable. They also listed electronic access to subject specific indexes such as *Medline* as key to offering the most current information. John Grant stressed the importance of full-text CD-ROM sources to his users as it facilitated delivery of information to those users off-site.

The final discussion centered on what tasks the librarians considered essential to managing their libraries. What were the tasks that they performed on an ongoing basis? The consensus was the following: maintaining the collection through weeding and selection of new materials, tracking library usage, and shelf reading. "The things you're never done with are the statistics, the shelf reading, and keeping in contact with your users. You always have to be on the lookout for new materials and services that will improve your ability to serve your patron" (Kim Laru, personal communication, November 8, 1998).

Throughout the interviews, there seemed to be a great deal of concurrence between the responses of the various individuals. However, one area of broad disagreement was the point at which the budget should be established. Some felt that it

was not possible to create a budget until you had the library up and running. This way the budget would be an accurate reflection of the costs of maintaining the library rather than finding a number and trying to do what was fiscally possible. Others felt that it was naïve to think that any corporate institution would allow a library project to begin without a clear outline of the costs to be incurred. However, beyond the issue of timing, all of the founding librarians interviewed felt that the establishment of a realistic budget was crucial to the longevity of the library facility.

In addition to the expertise of the librarians interviewed, the author has imparted some original knowledge of her own. In the introduction of the handbook, she outlines her experiences in assisting in establishing, or solely set up, six special libraries. Further information on the author's library experience is detailed in Appendix B.

Beyond interviewing other librarians and personal knowledge all “authoritative” sources for library operation and management information were consulted. Each of the previously mentioned steps was thoroughly researched making it possible to create a manual that covers everything from line-item budgeting to fire-code adherence. The goal was for the manual to assist the user by explaining and illustrating each step of the process of setting up a new information facility to insure the longevity of a new corporate library. The only way to do that was to draw from a variety of sources that would allow the reader to glean what information was applicable to their library's environment and leave the rest for the next reader.

Writing and Designing Format

Building the Competitive Edge: A Handbook for Starting a Corporate Library goes through each step in the initial organization of a library center. In deciding on a format for the handbook, the experiences of the other founding librarians were seriously considered. At many stages of the writing process, these librarians were asked to review the order in which steps were being presented. Their experiences helped determine the order of the chapters. Many of them suggested an even more rudimentary break-down of the process. This led to dividing the process into the five larger phases: Assessing What You Have, Assessing What You Need, Getting What You Need, Organizing It All, and Getting It To The People.

Within those five phases, the text has a total of 13 chapters followed by four appendices. Each chapter is headed by a brief abstract of what will be covered, allowing the user to gauge the applicability of the chapter before reading it in its entirety. The abstract is followed by a list of key terms defined in a dictionary-style format. Examples of some key terms are: mission statement, line-item budgets, concurrent users, and intranet. These are just a sampling of the 42 key terms defined. These terms are then listed again in the glossary in appendix B. This format was added at the direct suggestion of San Diego Water Authority Librarian, Kim Laru. She felt that terms needed to be explained prior to their introduction in the text (Kim Laru, personal communication, January 28, 1999). Her comment made a great difference in the overall layout of the text.

Each chapter is concluded by a "Further Readings" list that suggests titles of texts and articles that will provide the user with more detailed information. These lists include

authoritative sources for individual areas of library management that might be too in-depth as an initial overview, but still contain information that will be valuable to librarians as they progress in the process of creating a new library. The use of this tool was selected partially due to the fact that the majority of authoritative sources utilized a similar construct that pointed users to sources of more in-depth study if they so chose. Recognizing that not all users of the handbook would be familiar with the American Psychological Association (APA) format, another bibliographic layout was chosen for these citations. In seeking a format that would be easily understood by all readers, a basic title, author, (publisher, date) was adopted. This format was used consistently throughout the text in the “Further Readings” lists. This simplified format will allow the readers to gather all the needed bibliographic information regardless of the citation style they are used to.

Following the text are appendices that include a list of library associations, a glossary, a list of suggested references for a librarian’s tool kit, sample user surveys from other corporate libraries, and the bibliography which is done in the classic APA format. In appendix A the list of associations and contact information was provided to stress the importance of not working in a vacuum. These association contacts will allow the user to locate personal resources and other librarians in situations similar to the reader. The list includes the American Association of Law Librarians, American Library Association (ALA), American Society for Information Science (ASIS), Association of Libraries and Information Bureaus (ASLIB), Association of Research Libraries (ARL), Canadian Library Association, Church and Synagogue Library Association (CSLA), Medical

Library Association (MLA), National Librarians Association, National Library of Medicine (NLM), Society for Information Management (SIM), and Special Libraries Association (SLA). Each listing includes a mailing address, telephone number, and when possible a website address. Many of the associations have local chapters. Users of the handbook are urged to contact them for personal assistance.

Appendix B is a glossary which includes all of the terms that were listed at the opening of each chapter, as well as some other library terms that are often used in the lexicon of library science. The use of key terms was added to assist the user by removing the barrier of rhetoric from the learning process. Users do not need to stop and look-up a term before they are able to internalize the information given within the chapter.

Appendix C is a short list of texts and journals that the reader is urged to consider adding to their tool kit of librarian's reference sources. These include a list of library science journals, periodical directories, and general texts on the subject of managing a special library.

Appendix D includes samples of user surveys from four special libraries. Every effort was made to include examples from libraries covering differing subject areas and institutional settings. The first included, while from a biomedical library, is general enough to fit most settings. The second is from a public relations or marketing facility and shows a variety of formats for questions. These formats include short answer, rating selection (outstanding, good, fair, or poor), and checking the applicable statement. The third sample is from an engineering and research library. This survey is an effective example of how to include demographic questions, such as rank within the organization

and length of employment. It also shows questions of preferred format, such as audiocassettes or foreign language materials. The final survey is from a library that serves an entire company, from finance to pharmacology. It is a prime example of just how detailed a survey can be. This four-page questionnaire asks the user to identify areas of interest, frequency of library use, satisfaction with the current collection and electronic resources used most often. It even allows non-users a section to comment on why they go elsewhere to meet their information needs. In including these examples, the handbook seeks to give the librarian assistance in developing their own surveys that will best suit their library's needs. An entire chapter of the text is devoted to assessing library user needs. This is a crucial and ongoing part of developing and managing a library facility.

Appendix E was added to include an expanded example to a library budget. The sample included within the text is a rather simplified one, and the inclusion of a more detailed budget will allow the user to see in detail areas that may not have been included in the briefer example. In addition this expanded budget includes columns for previous years expenditures as compared to this year's projected costs.

A sample of a library services brochure was included in Appendix F. This brochure was created using a basic word processing program, using commercially available paper. This sample will show the user that it is possible to produce a professional looking brochure without contracting a graphic designer. The author created this brochure; therefore no copyright issues exist.

The final section of the handbook is a comprehensive bibliography. In addition to including items listed in the "further readings" sections, this bibliography includes all

sources that were read in the process of researching for the handbook. These are included because some of the sources dealt with very narrow subject material that was not suitable for inclusion within specific chapters, but might be of use to some librarians. In addition, some older items may be of use to a reader seeking greater depth in a particular area.

Evaluation and Revision

When the first version of the handbook was completed, several special librarians were asked to review it for content and ease of use. These reviewers included those founding librarians already interviewed as well as others, including Elizabeth Hill and Jennifer Benelli. Both are teachers and are familiar with the information-seeking process. However, neither of these people have extensive experience in libraries. They were selected in order to test the ability of the handbook to be used by even the most novice of librarians. They assisted in making sure that the text was clear and concise, while not being overly simple. As a result of the reviewers' suggestions many of the tables in the text were added. These tables include examples of a line-item budget sheet, a breakdown of both the Dewey and the LC classification systems, and examples of two libraries' mission statements. All of the reviewers felt it was important to add these visual aids to assist in clarifying of the process. The reviewers also suggested adding the key terms and abstract for each chapter. Prior to this, the chapters opened directly into text, with no separate definitions other than what was included within the body of the chapter itself.

During the review process, the issue of how much detail should be given to digital technologies was discussed. One reviewer felt that further discussing automated

technologies in the text would alienate those libraries that would not be automated, while others felt that greater discussion of automation was needed. “I think the handbook misses a large portion of its audience by assuming that the library is automated” (Kim Laru, personal communication, January 28, 1999). After careful consideration, it was decided that the text should discuss issues surrounding technologies, such as electronic licenses and desktop accessibility, but would not spend time listing specific systems, technologies, or online resources. However, at the urging of advisors, a list of Internet search engines was added.

After reworking the handbook four separate times, these reviewers were satisfied with the usefulness of the final product. Each of the librarians interviewed provided knowledge that they gained in taking part in the creation of new corporate information facilities. Their first-hand knowledge was invaluable to the process of creating *Building the Competitive Edge: A Handbook for Starting a Corporate Library*.

CONCLUSION

This project produced *Building the Competitive Edge: A Handbook for Starting a Corporate Library*. This handbook is designed to assist the librarian taking part in the design and development of a new corporate library or information center. The manual was written to be useful to the seasoned librarian, while not neglecting the librarian new to the role of manager. It does not suggest that the process of creating a new library facility should be undertaken by an individual with no library experience. The task of starting a new information facility entails a great deal of planning, organization, and hard work. Having a clear picture of what steps lay ahead will be helpful to all who are involved in the endeavor.

The process of creating a new information facility is broken down into five essential elements. These elements are: assessing what is currently available, assessing what is needed, getting what is needed, organizing it all, and getting it to the user. Within these five phases are thirteen chapters that represent the individual steps. These steps are: surveying what is already there, making the most of the space available, defining user needs, creating a collection development policy, determining the ideal collection, preparing a budget, researching a vendor, deciding on a catalog or organizational system, cataloging materials, developing services, establishing connections to the outside world, marketing of the library, and managing the library.

The handbook also includes visual aids such as examples of line-item budgets, samples of library mission statements, outlines of major classification systems, and

library user surveys. The sample user survey forms will assist the new library staff to develop their own forms to fit their specific needs. Each chapter is concluded by a "Further Readings" list that will point the user toward sources of more in-depth information on various topics of interest. The resulting handbook may be used as a roadmap or trail-guide for founding librarians and their staff.

The handbook may be used in its entirety to design a whole new facility from the ground up, or library staff may use just the chapters they need. Library assistants may use the text as a good overview of certain areas of library functions. For example, maybe the library staff just needs the chapter on expanding the library or how to market existing services. The handbook is designed so that users can easily access material on various topics without having to read the text cover to cover. In this way, the handbook may be of use to corporate libraries in all stages of development.

If this project were re-attempted, there are a few suggestions that might make the resulting handbook more useful to the reader. First and foremost, an area that was not covered with any depth was copyright law. While it would be difficult to cover such a complex issue as copyright in the handbook format, it is clear that this is an issue of great concern to many corporate librarians. The corporate environment seldom falls under the nonprofit educational status required by "fair use" statutes. An additional chapter should be added with basic coverage of the law, recent cases, and their application in the corporate environment. While the Copyright Clearance Center was added to the list of associations, more attention should be given to copyright services available to libraries.

Another weakness was the handbook's brief coverage of the process of cataloging. It would be impossible to teach someone new to the process of cataloging how to catalog in just two chapters. Someone who is very experienced might consider a handbook style text on the "how-to" of cataloging. As it was, this text merely sought to explain what should be accomplished by the process of cataloging and then referred readers to the texts listed in the "Further Readings" for more assistance.

In conducting the literature review, the American Library Association (ALA) and the Special Libraries Association (SLA) were contacted. In describing the information being sought, they expressed their sorrow in being unable to help further. ALA stated that one of their weaknesses was that they always assume the library already exists. SLA offered a few suggestions, but primarily suggested their consultation service (which is suggested by the manual as well). SLA also expressed interest in the finished product. They felt that if this guide were well written, it would be publishable. The handbook might even help to show corporations considering a library that it was an undertaking best handled by someone with library experience and possibly lead to future professional jobs.

At the recent Spring Seminar of the San Diego chapter of SLA, this project was discussed with several other solo-founding librarians. Two were beginning the process of creating new information facilities at pharmaceutical companies, another was working at a law firm. All expressed interest in the handbook. Two of them offered to purchase a copy on the spot. *Building the Competitive Edge: A Handbook for Starting a Corporate Library* clearly meets an existing need within the library community. Thus, this project

has produced a marketable handbook that will assist corporations in founding library and information centers that will stand as an asset to the parent company. In addition, use of this guide will make the job of the founding librarian more defined and thus achievable. This project's primary goal was to create an accessible handbook that may lead to the founding of more corporate libraries, and thus more opportunities for librarians to excel in the corporate environment.

APPENDIX A

Corporate Librarian Interview Form

To be used as a guideline for an oral interview, not a written worksheet.

Name:_____ **Company:**_____

Position title:_____

Length of employment:_____ **Number of staff:**_____

What condition was the library in when you arrived (if it existed at all)?

Did the library have a collection development policy in place?

How did you decide on a plan of action?

What was your first task?

What were your subsequent actions?

Where is the library positioned on the corporate organization chart?

What level of support did the parent organization offer?

What was your operating/start-up budget?

How did you get that budget?

How long did it take you to get the library ready for service?

Who are your core patrons? Management, staff, etc.?

What core services do you offer?

What sort of technology do you currently use? (i.e. Internet, automated catalog, network access, CD-ROM, etc.)

What library services do those technologies support?

What suggestions would you have for a founding solo librarian?

APPENDIX B

This appendix serves to outline the library experience of the author. It is written in first person at the recommendation of this project's advisory committee.

A great deal of the information put forth in this project and the resulting handbook is based on experiences gained while setting up six library facilities. As such, it seemed important to outline those experiences and describe the facilities that were created.

Two of the facilities where I gained experience were literacy tutor resource libraries. The first library was an adult literacy tutor library created for the Volunteer Resources Department of the University of San Diego. This facility was unique in that the special needs of users required materials at an elementary reading level, not of an elementary subject level. Here, an automated catalog was created using Microsoft Excel that was searchable by author, title, subject, and reading level. A literacy specialist on staff with the university designed the reading level designations. I sought out special sources for the needs-specific materials required for the collection. In addition I solicited funding for the library from local sources. The initial collection was completely funded by donations totaling \$750.

The second literacy library that this author founded still stands in the recreation room for the housing projects in north Linda Vista, California. This facility was to be used by the children living onsite. I designed a cataloging system using color coding to allow children to select items by their reading level. The texts and catalog cards were color coded to indicate four different reading levels. Texts were shelved using those

colors. No automated system was used in this location, as the onsite manager of the housing project felt that a computer would be at too great a risk for theft. Therefore, a card catalog system using a file and a separate box for checkouts was implemented. Cards contained basic bibliographic information such as author, title, and one to two subject headings. A child selecting a text would pull the card from the file and place it in the "check out" box with their name written on it.

I was given an initial budget of \$200, which I supplemented with funds of my own. Primary selection criteria were suggestions from the children as well as a list of suggested readings obtained from the local public school. In addition to those criteria, texts given the Caldecott award, a well-known children's book award, were selected.

Two of the other libraries I assisted in were on tribal lands. The Pala and Rincon Reservation Libraries were a long running internship opportunity through the San Jose State University, School of Library and Information Science Southern California Program. After meeting with the program supervisor, Bonnie Biggs, I was chosen to assist in the early stages of planning and cataloging on both tribal library sites. While both bands originated from the Cupeno Indians, the two reservations are now very different. The Pala library was well supported by the local population. Though at that time it was housed in a trailer, the tribe was in the process of writing a grant proposal for funding to build a new, permanent facility. A tribal member who was also taking library science classes at Palomar College ran the Pala library full-time. At that time Pala was the only tribal library in San Diego County that had a manager with any formal library instruction. With another intern I assisted the library manager, Doretta Music, in

selecting a library automation package. DbText/InMagic was purchased and installed on the library's one computer. I volunteered three mornings a week to catalog the existing collection using standard Dewey Decimal Classification schemes.

At Pala I also assisted in determining the library's future technology needs for inclusion in the grant proposal, creating a detailed diagram of a proposed networked computer system. The grant proposal was eventually funded; the new Pala library was built the following summer. The Pala library is now housed in a five-room facility, including the computer center set-up using my diagram.

The library on the Rincon reservation was a very different experience. Like Pala, this site selected the automated system DbText/InMagic. However, that is where the similarities end. The Rincon library had no full-time manager. A tribal member with no formal library training ran the library when time allowed. The collection was housed in a meeting room of the tribal hall. This meant that whenever the tribal council was in session, no one could access the library. In addition, when the part-time manager was not there, the collection remained behind a padlocked gate.

Despite the obstacles, this author and another intern successfully cataloged the entire collection using standard Dewey Decimal Classification schedules. Unfortunately, just as the cataloging was nearing completion, the State of California closed down the reservation's casino and arrested tribal council members for use of video poker machines. Faced with other problems, support for the library project within the tribal council dwindled and the library was closed. Even though this may not sound like a prime

learning experience, I learned a great deal. In any library, the politics of the larger institution within which the library must survive can greatly affect the library itself.

The final two information centers in which the author gained her experience were corporate libraries. Both of these sites were planned and executed solely by the author. The first was a library to serve the marketing department of a large industrial engineering company in San Diego. This company contacted me to draft a business proposal and bid for the contract to create a new corporate information facility in their downtown office. After an initial meeting with the manager of the marketing department, I drafted a seven-page plan outlining the process by which I would: assess the needs of the marketing department, compare those needs to the resources currently available to the department, and then acquire the materials needed to bring the library into line with the information needs of the department. I was awarded the job and was contracted for a six-month period with the understanding that at the conclusion of the contract I would train onsite staff to maintain the library collection.

In seeking to define the marketing department's information needs, this author designed a user survey to be given to all of the 57 staff members in the department. The results of the survey showed that staff was largely unaware of the resources already available to them. It further showed that the department was in dire need of efficient access to more current information. After cataloging the existing collection using library software previously purchased by the company, I moved on to acquiring the necessary materials needed to update the collection.

The survey had indicated that journals were a major source of information for department members. The survey also showed that routed journals were an average of two months old by the time routing was completed. I suggested that the department contract with an electronic table of contents router. Services such as "Carl UnCover" will send copies of the table of contents from selected journals directly to the user via their email. This allows everyone to view the contents of a journal and then request copies of needed articles from the library. The actual journal comes directly to the library from the publisher, thus allowing everyone access on the day it arrives. I negotiated further contracts for the department with several current awareness bulletins in the applicable subject areas. These bulletins are now sent directly to the desktop of the users.

At the conclusion of the contract, I urged the department to bring in a librarian on at least a part-time basis, rather than leave the management of the collection to already overworked administrative staff. The marketing department finally agreed to contract a library service to come in on a weekly basis.

The second corporate information facility I designed and developed still serves the 500 staff members of a biomedical research firm in San Diego. In this case, I was contracted on an ongoing hourly basis. I began with detailed analysis of the user base that would have access to the library. This was accomplished through the use of surveys as well as focus groups. Through the use of user surveys and interviews, I drafted a proposal of suggested materials, services, and budget that was given to upper management. Many of the suggested texts were taken from the Medical Library Association's list of suggested texts for the small medical library. Then based on

management's review and approval of this list and proposal, I purchased a beginning core collection. This was done through the use of a vendor. Prior to selecting the final source for the materials, I sought bids from four different vendors. After being satisfied with the cost and services provided by the vendor, I selected Ambassador Book Service to supply the initial core collection.

Prior to the new texts arriving, I negotiated with the computer department of the company and convinced them to purchase the automated library software using funds from the computer department's budget. The initial license was for one free-standing copy to be used in the library. This license would later be expanded to users outside the library when the initial cataloging was complete. After cataloging all items in the automated system, I set up contracts with external vendors for items such as document delivery, and current awareness bulletins. I created marketing tools such as a tri-fold brochure, flyers, and bookmarks that increased company awareness of the new facility. After seven months, the library opened for business. I gave training seminars on utilization of library services. I remain under contract with this company and still serve as their librarian.

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Building the Competitive Edge:
A Handbook for Starting a
Corporate Library

By
Sarah E. Way

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Sarah Elizabeth Way

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DEDICATION

This handbook is dedicated to the memory of Robert Hill, my grandfather who served as a manuscript librarian for the New York Public Library for his entire career. In addition, it is dedicated to the seven other librarians in my family tree.

I would like to thank my committee chair, Dr. Debra Hansen, as well as committee members, Dr. Nancy Burns and Sue Brewsaugh of Boeing's library. Their assistance and encouragement have been invaluable.

Additional thanks are owed to Hannah who endured hours in the stroller while mommy searched the stacks and photocopied, and who graciously understood that mommy's books couldn't be colored in. Additional thanks to my loving husband, Scott, for all the support and understanding.

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Introduction

This handbook is a guide designed to assist the first-time founding librarian. You have just been given the opportunity to get a new library up and running. This is not a process that should be taken on by someone with no library experience. However, even if you have had experience with libraries, it is probable that you have never started one from scratch and probably have not worked in all areas of the library before. This text will help break down the process of creating a new library facility into more manageable steps.

It should be stressed that this guide is not for the novice to librarianship, but rather a novice to designing the entire library facility from the ground up. This text expects that the user will have knowledge in some areas of library science, just not necessarily in all areas. As such, use the sections that meet your needs. If you have been cataloging for twelve years, but have never been responsible for a budget, by all means skip the chapters on cataloging, but read the chapter on budgeting.

First let me begin by introducing myself. I believe this to be necessary, because much of the information contained in this handbook comes from my own and other special librarians' experiences. I am currently a solo librarian for a biomedical research company. This library is the sixth that I have helped to come into fruition. I have started two special libraries used by adult literacy tutors. I volunteered at two tribal libraries and worked mostly on automating the collections. I have also worked in two corporate libraries. The first was a small library used solely by the marketing department of a large international manufacturing company. Prior to starting my career as a solo-

founding librarian, I had worked for two academic libraries. Without knowing it, I have fulfilled a genetic destiny within my family, as I am the ninth librarian in my family tree. I enjoy working in a library. The task of seeking to fulfill the information needs of others is a joy to me. Hopefully it will be for you, too.

In gathering research to complete this handbook, I spoke with several other special librarians. Each graciously shared their expertise and experiences with me. It is important to know that some of their experiences may not mirror what you will encounter. Each institution is different; therefore, each experience will be different. The creation of a new library is a circular process and thus is difficult to turn into a linear guidebook. It is my strong suggestion that you look through the entire text before beginning any one step. This will help familiarize you with the process as a whole and will help give insight into the value a given step will have later. Not every chapter will apply to everyone. Some of your libraries may not be automated; some may already have a rudimentary collection. If you are not responsible for creating your own budget, just skim that chapter. Please feel free to take the information that assists you and leave the rest for the next librarian. Suggestions are aimed at the ideal. You may not have the space, the budget, or the time to implement all of them. Try the ones that work for you and your environment. The bottom line is that this can be fun and exciting. It can also be overwhelming. The goal of this handbook is to help make the process as a whole more clear. I also hope that the tips and tidbits discovered by other librarians and myself can help you to avoid discouraging pitfalls and help ensure the long-term health of your new library facility.

I would like to make an additional comment about automation and digital technologies. In the ideal world, all of you would have the funds and technological support to plan a collection as digital as you wish. However, in the real world, corporate libraries run the gamut from card catalogs through completely digital. This handbook strives to serve the middle ground on this issue. After great debate, I decided not to list very many specific electronic sources and digital technologies. As with many computer texts, the handbook would be outdated by the time it went to print. Throughout the text, references are made to library and information science periodicals. I strongly suggest that if this text does not address your digital needs, you then seek out the latest issues of these periodicals. Good articles on electronic sources and use of new technologies in the library are published nearly every month.

* * *

So why do you need this handbook? Probably a company executive has told you that you are now responsible for the creation of some sort of information center. Now begins the process of setting up a new information facility. Maybe you are lucky enough to have a resident library professional who has established a library before, but probably not. You may be lucky enough to have a staff to help you, or you may be on your own. So where do you start? What is the first step? This handbook will help you along the way. Think of it as a map to the buried treasure of information accessibility.

Organizing a library can be one of the most
rewarding experiences an individual can ever have, since the
resources and services the library offers will be of continuing

benefit to the library's users. However, it can also be a frustrating and disappointing experience without proper planning (Sager, 1992, p. 5).

This manual will assist with just that planning. The text is laid out in five basic sections, each covering a general area of the overall process of setting up a new corporate library or information facility.

- Section I Assessing what you have
- Section II Assessing what you need
- Section III How to get what you need
- Section IV Organizing it all
- Section V Getting to the people

Each of these sections is broken down into chapters outlining specific tasks. Each chapter includes a "Further Readings" list of other resources for more in-depth information in a specific topic area. Also, at the conclusion of the text is a glossary of common library terminology. Talking the talk always helps in meetings when asking for funding!

Let's look briefly at why your company may have decided that they need their own library. Why can't staff get it all from the local public library or, my favorite, "It's all free on the Internet, right?" Well, please read on. It will become apparent that the work involved in establishing and managing a corporate information facility is well worth the benefit of having an internal collection that addresses the specific needs of your office team.

In the modern “Information Age,” the role of the library has expanded beyond that of just the large academic or public facility. The corporate library is becoming more pervasive. “In this age of information creation and access, the special librarian, as an information specialist, is an essential member of any organizational team” (Stowe, 1997, p. 9). In a recent report by the San Diego chapter of the Special Libraries Association, public relations chair Karen Sharpe found that there were 95 local companies just in the biomedical field that would benefit from creating a corporate library. And, in fact, the day the report was published, she was contacted by one of the firms for information on how to create one (p. 9).

The current movement toward establishing libraries or information centers in the corporate environment is due to one main factor: companies are beginning to recognize information as a critical asset to their fiscal success. “Companies today must operate in an increasingly competitive corporate environment. The constant changes and innovations in information technology are major influences on an organization’s ability to stand out and succeed in the global marketplace” (Diamond, 1998, p. 82). “In the information age, research libraries are becoming even more strategic as assets not only to companies, but communities” (Keller, 1998, p. 24). Information centers are being created to fulfill this increased need for information.

It is not always feasible to send an employee to the local library. In addition, a company’s information needs are often very specific and cannot always be met by local public resources. As such, many are deciding that it is to the company’s advantage to create an in-house library or information center so that information needs can be satisfied

immediately. In addition, onsite centers are able to retain company-sensitive material that may have confidentiality issues and can meet the highly specialized needs of the specific environment. Information such as corporate counterintelligence or future strategic plans can now be available without staff ever leaving the confines of the organization.

In the State of California alone, 265 new special libraries were opened during 1995 (Starr, 1995, p. 3). The *California Library Statistics 1995* reported that \$60,723,000 was spent in total operating expenditures for special libraries in 1995 (Starr, 1995, p. 5). More recently, the number of special libraries (excluding public, academic, armed forces and government collections) was reported at 10,282 in 1997. This compares to 8,198 academic libraries in the same period (Bogart, 1997, p. 426). Special library facilities are fast becoming a large portion of the total number of library facilities. Clearly, special libraries and information centers are becoming a part of business today. Companies are spending a good deal of money to house and organize their information.

Even given the numbers, there is still very little information currently available to assist in the process of setting up a new information facility. The initial phase of library planning is crucial to the future success of the facility. Whether it will be called an "Information Center" or "Reference Center" or even "Library," the laying of the foundation is crucial. "Superior libraries indeed improve the overall well being of the citizens they serve, but in the competitive commercial world, a superior library can also bring untold value to a business. A good research library can increase the intellectual capital of a company and add value for all stakeholders" (Keller, 1998, p. 24). As with

any project, “superior” status does not just occur, it takes organization and management. Creating an effective and useful library facility means much more than just placing books on a shelf in a given order.

This handbook provides a step-by-step guide to creating a new library facility. It will address key items such as assessing the organization’s needs, assessing the current collection, establishing selection criteria, deciding on automation, marketing library services, and delivering information. Now that you know that you need and want an on-site library facility, let’s get started.

Section I Assessing What You Have

Chapter 1. Surveying What You Currently Have

This chapter will assist you in creating an advisory committee and defining the library's mission statement. It will also help you ascertain what assets you already have.

Key Terms To Look For

- **Mission Statement** — A written declaration of the library's values and goals.
 - **Advisory Committee** — A group chosen to represent the broader user base to serve as a sample group to ascertain needs.
-

The very first step in your journey of developing a new library or information facility is to take a few actions that will make the entire process move more quickly and effectively. As soon as you are assigned the library development project, ask “the powers that be” (upper management) to convene an advisory committee made up of representatives of your future library user base. This committee should be small, not more than five or six people. Members should be from various position levels within the company as well as differing departments if your library is to serve more than one department. This group will allow you to gather information about the needs and preferences of your user base without the cost and time involved in polling everyone in your company. This committee might meet monthly or on an as-needed basis. Members should not have to give up a large amount of time. Let members know that they will be influencing what services are offered to them in the future, so it is to their advantage to take the commitment seriously.

You may be new to this company. One of the most beneficial aspects of the advisory committee is to help impart the “tribal knowledge of the organization.” The committee members can explain inside information about the way things have always been done, when there aren’t written policies to guide you. There are modes or courses of action that occur within an environment that have “just always been done that way.” Understanding the corporate culture in which you want your library to thrive is crucial to its success (Kim Laru, San Diego Country Water Authority Librarian, personal communication, January 26, 1998).

The first item on your committee’s agenda is to address some basic questions:

1. How will the library’s purpose relate to the company’s larger mission or purpose?

Ask for a copy of the company’s mission statement. If you’ve never read it, you should. You may find a goldmine for later funding support. Your company’s mission statement may mention “a commitment to further the education of staff and management.” Right there is your justification for funding! Having a clear understanding of the parent company’s purpose will ensure that your library stays on track in supporting its users.

2. What is the mission of the library? What is the purpose of its existence?

This is not a trick Zen question. What I mean is, what will the library do? Keep in mind that your library must function within the larger entity that it will serve. So the library’s mission can not be counter to that of the parent organization. You want to

create a one-paragraph description of the purpose of the library. (See figures 1.1 and 1.2.)

Figure 1.1

The Massachusetts Institute of Technology Library's mission is to facilitate access to relevant information through the development of library, archival and museum collections; through their organization and arrangement of access and use; and through the provision of appropriate information services. (Stueart & Moran, 1993, p. 45)

Figure 1.2

The purpose of the National Library of Medicine is to assist the advancement of the medical and related sciences, and to aid the dissemination and exchange of scientific and other information to the progress of medicine and to the public health. (Stueart & Moran, 1993, p. 45)

Even paragraphs this seemingly simple will be of invaluable assistance later. They will give you a clear outline of what the core goal of your library is and will help to clarify the direction and thus planning decisions within the library.

You will also need upper management to define what it is they are expecting from this new facility. Will the library be responsible for maintaining the company Intranet? Will you be housing company documents? Will you be a research center, or more of an archive? Special libraries come in many different flavors. Some are traditional libraries.

But others are more document centers — they hold internal company research and documents. Still others are virtual libraries — very few 'books' but intense research responsibilities. Many special libraries are a combination of these types. Understanding the expectations from the start will help the entire process to move more smoothly. After all, it's hard to get somewhere when you don't know where you're going.

Understanding the expectations of the parent organization before beginning the task of designing the new facility is very important. The company may set a deadline for completion without any idea of the amount of work the process will require. Everyone involved in the process should understand that the creation of a new library will not happen overnight. MasterCard recently set up a corporate library in its New York office. “MasterCard gave birth to its Corporate Library in 10 months. That is to say, it took 10 months from the drawing of a business plan until the formal opening” (Katz, 1998, p. 1). You should expect this project to take a while. Management must be made aware of the time requirements. If either party's idea of the duration is incorrect, accurate evaluation of progress is not possible. Once the mission is clear and the timetable is understood, you can move on to the really fun stuff.

The next step in setting up a new facility is to determine what you already have. If you are staring at an empty room you may think you are done. Not so. There are several questions still to be answered. How much space do you have? What floor of the building are you on, and what is the floor weight capacity? Do you have a computer? A printer? How about phone lines, Internet access? Do you have a budget available to you? Make note of it all. Overwhelmed yet? Don't be.

Instead of an empty room, you may be starting with a room full of other people's cast-offs. This is the time to get permission to come in to work wearing jeans and start digging through those storage boxes. I once found ten years of back issues of *The New England Journal of Medicine*. By finding these, the library saved quite a bit of money that would have gone into ordering articles through document delivery for journals we already owned! Treasures can only be found by digging!

Before you even look at what you have to put in the room, let's look at the room itself. Does it have adequate lighting? Most office buildings have the standard overhead florescents, but if your room happens to have only a few fixtures, you will need to talk to your facilities people about increasing the light in the room. Speaking of light; does the room have natural light from windows? If so think about that sunlight and what it could do to your collection. Probably you won't have 18th century illuminated manuscripts that would be damaged by the sun, but maybe you will have an audiovisual collection. Warm sun can quickly damage your videotapes. Be aware of where the sunlight falls during the course of the day and be sure to place sensitive material out of its path.

Now you need to look at the room and visualize it with all of your electronic equipment in it. Do you have enough power outlets? Don't forget the electric pencil sharpener and other "little" appliances. Remember that computers need more than one outlet. Typically one for the monitor, one for the CPU and if you have external speakers, one for them too. Now, I run all of my computer plugs through an additional power strip. These strips allow for "instant" addition of outlets. Many often also act as a back-up surge protector. This will protect your system from any variations in the power supply

that comes out of the wall socket. Again, talk to your facilities people about their recommendations on the use of surge protectors.

Beyond power outlets, you also need to be aware of how many phone jacks you have available. If you are planning to have Internet access in the library (I highly recommend it and we'll discuss it later) you need to plan for adequate wiring now. Most likely your company uses datadrops, or lines that are designed to carry data rather than traditional phone conversations. However, your library may have to access the Internet using a traditional phone line. Whichever the case, now is the easiest time to open up walls and add wiring. I strongly recommend that you include enough lines so that no two systems will have to share a line. Trying to share a line with a fax machine and a phone as well as a computer can quickly lead to gridlock. Once you get the room full of materials you will be very glad that you took note of these items early in the process.

Let's start with the actual collection, if any. If you don't have anything, consider part of your work done! But if there are some materials already, then you need to know what you have. At this stage you are not making a real evaluation of the collection, but merely surveying what you have. It is impossible to make a true evaluation of a collection until you have assessed the needs of the users. Only then can you know how well the collection will meet those needs. But let's just start with figuring out what you do have. This will help to eliminate duplication later as well as give you something to show management. "This is the collection as it now stands" sounds a lot better than "Well, there are already some books on the shelves."

Right now we are going to start with a quantitative assessment. The following is a list of questions to use in your evaluation.

1. Do you have books, and/or journals? List the formats you have.
2. Do you have audiovisual materials such as video or audiocassettes?
3. Do you have other formats such as art or models?
4. Do you have any electronic formats, CDs, or online subscriptions?

Now ask the following questions about each of your formats.

5. How many of each type of format do you have? (Just a number)
6. Are there duplicates of any titles?
7. How old are these items? You don't have to list exact dates, just know whether they are recent or several years old.
8. What sort of condition are they in? Are they paperbacks with the cover missing, are they hardbound with bent covers, or do they look pretty well intact. *If you find any texts with mildew or small bugs in them pull them out of the area NOW!!!!!! Bugs and mildew can sweep through a collection very fast and turn a nice library into a pile of paper to be recycled. Unless you have the original copy of an out-of-print text, it's better to get rid of the damaged material.*
9. Are most of the items in the same general subject area? Or do they cover a broad range of subjects?
10. If the items cover one basic subject area, what is it? Does that subject area match what your company does?
11. Look again at the journals and magazines. What dates do you have?
12. What subscriptions does the library still receive?
13. What subscriptions do other people in the company receive?
14. Will your library be responsible for housing company reports?
15. How are those reports bound? Are the just staples or are they in binders?
16. Roughly how often are these reports generated? How many will you have to plan for?

Once you've answered these questions you should have a pretty good idea of the state of your current collection. But you won't know if items in that collection meet user needs until you get to know your current and potential users better. We'll look closely at that issue in Chapter 3.

Further Readings

Collection Development and Assessment in Health Sciences Libraries by Daniel T. Richards and Dottie Eakin (Scarecrow Press, 1997).

Collection Assessment in Music Libraries by Jane Gottlieb (Music Library Association, 1994).

Collection Assessment by The Association of Research Libraries, Office of Management Studies (The Association, 1978).

Collection Assessment Manual for College and University Libraries by Blaine H. Hall (Oryx Press, 1985).

Chapter 2. Making the Most of the Space You Have

This chapter will discuss effective use of space within the library. This will include the selection of shelving as well as designated workspaces and planning for differentiated work areas.

Key Terms To Look For:

- **Floor Weighting** — The weight a floor is capable of carrying per square foot before structural integrity is compromised.
 - **Compact Shelving** — Shelf units that roll together to minimize use of floor space.
 - **Americans with Disabilities Act (ADA)** — This law requires that facilities be accessible to those who are physically challenged.
-

Effective use of space is key to any library. Two of the biggest concerns in library management are budget and space. If you are very lucky, your office manager will build a space for you, but most likely you will have to make do with an empty office, an old file room, or even a conference room. How you use that space can make the difference between a library that feels cramped and a library that welcomes users.

Generally, there are three space areas that need to be considered for basic operation. These areas are for collection management, user services, and library administration (Sager, 1992). If yours is to be a one-person library, this may sound like more space than you have or need. But this space does not have to be individual rooms or even partitioned off. You simply need to plan for defined areas before you get too many books on the shelves.

Allocating for collection management space simply means making sure you have room to catalog and keep your materials. You will need, at a minimum, a worktable or desk where you will catalog all incoming materials and the shelves to put them on. Your

cataloging space should be a bit off to the side, or you will have people “borrowing” books before you have entered them into your catalog. This can quickly turn into a big mess, as books are lost before you can even track who has them.

Another key issue in collection management is space for adequate shelving for your entire collection. A general rule of thumb is to allow for five years of expansion. Before you panic, I have never worked in a library that actually had room for five years of expansion. But if you are being asked to describe your ideal space, ask for five to six years' expansion. “Estimate the initial size of your collection, and the projected growth five years into the future. . . . A standard height, single faced section of shelving will accommodate 250 books” (Sager, 1992, p. 29). Use this to estimate how many shelves you will need and how much space you will need to house them. Trust me, your facilities manager will be glad that they don't have to move you after one year to accommodate your collection.

To determine growth in my library I looked at the amount of space that the average journal subscription filled in one year — two and one half feet. I then multiplied that space by the 80 subscriptions that I hold and figured that if I were to budget for five years of growth, I would need 200 feet of shelf space for my journals alone! Now this assumes that you will not be getting rid of back issues. Your library may have a policy of removing the oldest year of journal holdings as the new year comes in; this would lessen your future space considerably. In addition, space considerations are one of the primary reasons that libraries often opt for electronic resources. I will discuss electronic options in chapter 11.

User services space entails adequate table space for users to view material. Space for users to access your catalog, whether automated or not, should be included. If you have the space, a few soft-seating areas will encourage visitors. If you intend for people to use your materials in-house (i.e., not take them out of your library), you must allow for much more research space. It isn't just a matter of how many tables you can cram into a space. If people feel cramped they won't use the space. Also, consider noise when you select areas for reading and quiet study. Quiet work areas should be well away from high traffic areas such as near the copier or the reference desk. If at all possible, make use of rectangular tables rather than round. You will find that it is easier to plan for adequate walkways around a rectangular or square table than a circular table.

The amount of space you will need to provide for in-library reading will depend greatly on your company's culture. What I mean is, some companies prefer that employees remain at their desks. Other companies are supportive of staff making use of library workspaces. If your company works in teams, a few large tables would be most effective. If your environment requires more independent work by individuals, you may want to consider carrels instead of tables. These would give each person private space. In addition, the degree to which your collection will be electronic will effect your need for space. If your collection will be primarily digital, then less workspace is needed. If your collection will be primarily text, then you may need a great deal of space. In the case of a primarily digital collection, don't forget to plan for adequate wiring for all those computers. Understanding the culture in which your library is to exist will help you shape a library that will more effectively meet the needs of that company.

Having the right space for shelves doesn't just mean enough floor space. It also means adequate floor weighting. Unless you are on the ground floor, this is something you should check out. "In the United States, buildings constructed since World War II have a typical floor capacity of 50 to 80 pounds per square foot, adequate for offices but inadequate for fully loaded cabinets and library books" (Fraley & Anderson, 1990, p. 79). You need to know how many pounds per square foot your floor is rated to hold. If you are in a newer building, your facilities manager may even be able to contact the architect and ask if the space you have been allotted can hold an average of 125-150 pounds per square foot. This is if you are planning on having full-height shelving. If you are planning on only half-height shelving, then you should be fine with standard office floor weighting. Whenever possible, avoid office space that is "hanging" or appears to be supported mostly by glass. A good rule is to put your shelving along load-bearing walls. These walls have support all the way to the foundation. Ground floor space is optimum (Fraley & Anderson, 1990).

The third area to allocate for is administration: what you will use to run the library. You will need space for desks for library staff, a storage area for supplies, and room for any office equipment you may have such as copiers or fax machines. Don't underestimate the need for a table to sort mail and journals. Looking at these three areas, some of them may overlap. If you have one copier, it may serve your users as well as administration. Always consider economical use of space! You have just mastered one of the key principles of running a library!

Before you will be ready to open the library doors, you will need appropriate furniture if you do not already have furnishings. There are several library furniture catalogs available. For specialty items such as rotating racks or book pockets, these catalogs are wonderful resources. However, I am sure that there are some constraints on your budget. Purchasing library furniture can be a major item on your expense list. You do want to purchase quality items. Shelves that can't support your collection are no bargain at any price. However, I think that a table is pretty much a table anywhere you buy it. A "library" table can cost twice as much through a library catalog when compared to an "office barn" down the street. In addition, your facilities department may have a stash of basic office furniture that might suit your needs perfectly at nearly no cost. Your office manager can be your best friend! I cannot tell you how many times my office manager has "found" a file cabinet for me on a few hours notice that another department had vacated. She has saved me uncounted hours of price comparing, not to mention money!

In considering furniture placement, you must consider accessibility. The American's with Disabilities Act (ADA) requires that your facility be accessible to those who are physically challenged. This does not mean that you must shelve everything within the reach of someone in a wheelchair. It does, however, mean that your aisles must be 36 inches wide to accommodate the width of a wheelchair (Brown, 1995, p. 35). Ask your human resources department if they have a corporate policy regarding access.

On the subject of library furniture, I would like to discuss shelving. I highly recommend against wood shelving. Unless you are purchasing the very top of the line

shelves, wood shelves tend to bow toward the middle when they carry heavy loads. You should be able to fill a shelf three-fourths across without it bowing. In my biomedical library I find that the only type of shelf that can handle the medical texts is constructed of baked enamel steel. An added bonus with steel shelves is the ability to use magnetic bookends. These bookends have magnets on the bottom of the bookend that prevent slipping and give extra support at the end of a particularly heavy row of books. Wooden shelves are often made of particleboard or plywood, which are guilty of emitting pollutants and fumes from chemicals such as formaldehyde (Mayell, 1995, p. 154). If you really love the look of wood, many steel shelving units can be used with wood end panels. This will give you the look without sacrificing shelf strength.

Individual shelves within a range are usually adjustable so that each range can carry as many as seven shelves. For collections with taller “oversized” books, such as music or art, fewer shelves can be used allowing for more space between shelves. Generally speaking, most shelving units are 36 inches long and 90 inches high. Special lengths can be ordered for specific space needs. Shelf depth varies, ranging from 8 inches to 12 inches deep. Basically, the heavier the shelf load, the deeper it should be. A full shelf of journals will need 12 inches while 8 inches will easily hold paperbacks (Brown, 1995). Documents and records may require 16-inch depth shelves or more .

If you are very cramped for space and need to maintain a document collection, you may want to look into compact shelving. These shelves roll together so that only a few aisles are accessible at a time. These units can be life-savers, but they have their drawbacks. First, they are not very user friendly. If you need an item in a “closed” aisle

you have to wait until others are finished before you can move the shelves. Secondly, they are very heavy. Before purchasing compact shelving get in contact with your facilities department and, if possible, the architect to investigate floor supports (Brown, 1995). Aesthetically speaking, they can leave a lot to be desired.

Now that I've made compact shelving sound awful, let me describe the ideal situation for them. Some industries require companies to maintain documents for a number of years. Pharmaceutical companies as well as banking and many manufacturing industries must keep several years of huge reports on file. If your library's purpose is to maintain these documents and you and your staff are the only ones to have access to the stacks, compact shelving may be just what you are looking for. If you are on the ground floor of the building they may be perfect, as you will not have to worry as much about the floor-weight capacity.

Whatever type of shelving you decide on, installation is a very important step. A professional should install compact shelving. Standard shelving should be properly bolted into the wall and or floor, particularly in earthquake-prone areas. Shelves should never be left "floating." Consider what that shelf would do in case of an earthquake! Properly securing those shelves keeps you, your patron, and your collection safe!

In closing, the cost of good quality shelving is a sound investment in your library. Good shelves should support your library (literally) for a lifetime.

Further Readings

Library Space Planning: a How-To-Do-It Manual by Ruth A. Fraley and Carol Lee Anderson (Neal-Schuman Publishers, 1990).

Planning Library Interiors: the Selection of Furnishings for the 21st Century by Carol R. Brown (Oryx Publishing, 1995).

Space Planning in the Special Library by Roberta Freifeld and Caryl Masyr (Special Libraries Association, 1991).

Section II Assessing What You Need

Chapter 3. Determining What Your Users Need

This chapter will discuss how to evaluate your users' information needs. The design and use of surveys will be covered.

Key Terms To Look For:

- User — The patrons the library will serve.
 - User Survey — A brief questionnaire used to gather information about the library patrons' information needs.
-

Many assessments of user needs start by looking at patterns and frequency of use in the library, what's being used the most, etc. But as this is a new facility there probably aren't any formal past use statistics. To find out what your current and potential users need you have to do a bit of investigating.

First, you must know whom you are to serve. Will this library serve the entire organization, or just one department within the company? Will you support all of an international company, or just one office location? Will you be expected to serve the general public? Next, determine how many people you might serve. There can be quite a difference in a library that supports 10 versus 400 people. Your human resources department should be able to get you the rough numbers. The next step is to get a good idea or picture of your users. What is their average educational level, computer experience, rank in the company, and functional expertise? To find this information, as well as more in-depth data, you will need to create a user survey. This is where that advisory committee I discussed in the introduction can be of service.

For your first round of surveys, I would strongly suggest that you use your advisory committee rather than the entire organization. Keep in mind that you are gathering information to guide the planning of your library. Individual opinions about the library will not be as useful as a general idea of the information needs and habits of the community you will serve as a whole. So now you have to design a user survey.

What is a user survey?

A user survey is a brief questionnaire that allows you to gather information about your users, their information habits, as well as their wishes. It should discover the users' ideas about their needs for materials and services.

There are a few things to keep in mind when creating a survey. First and foremost: keep it brief. Few will take the time to answer a five-page test! Your questions should be specific. Keep the "Any Further Comments" to a minimum. Your survey should cover three types of information: demographic, preferential, and behavioral (Hall, 1985, p. 31).

Demographic information will include the technical experience and educational level of those answering your survey. Make sure this is anonymous. Some people don't want others knowing this information. In the corporate sector your survey should also include what the users' ranks are within the company, be they management, support staff, etc. Further demographic information should be available through your human resources department.

Preferential data will reveal what formats are preferred: microfiche, electronic, or print copy. The survey will also determine when the users prefer to use the library. Do

they want to come in first thing in the morning, or are they better at processing information after lunch? Also, you will want to ask what type of information they would like to see in the library. A great way to find out what type of information needs your users have is to ask them to describe five different instances when they sought information in the last year. Were they looking for a competitor's home office? Did they need to know how many bones are in the human foot? Also ask where they went to have those needs met. And were they met effectively? (Kim Laru, San Diego County Water Authority Librarian, personal communication, January 26, 1999)

The behavioral data will cover what users actually do rather than what they would like to do. Here is where you find out how fast they need their information. Do they need it in one hour or one day? How current must the information be? In certain subjects, such as biomedical or computer technologies, year-old information is less useful. In other subjects such as history, five years may be totally acceptable. How often do users search for information? Where are they getting their information now? All of this data will help you figure out what needs are already being met and what are not. In addition, the data should show what needs could be met more effectively by your library facility than current sources. You may find out that your company is spending hundreds of dollars on document delivery for items you already have! Cut that expense and you've just justified your existence.

In developing your questions, be specific. Vague questions will only give you vague answers. That information will do little to help you. For example, ask how far back they feel you should keep journals and why. This will help determine your retention

policy. Keep in mind that you are not making definitive decisions based on their answers. You will use the data you gather to assist in making future decisions. The information you gather will be looked at in relation to other circumstances such as space and nearby resources. You may want to provide a few lines at the end for specific title suggestions for your collection, especially in later surveys.

Careful review of survey responses should give you good insight into your future users. These surveys will help you create a collection development policy. This policy will serve as the backbone of your library. It will justify all decisions made as to collection and library policies as well as allow for continuity if more than one person is to run the facility. The following chapter will discuss how to go about drafting such a policy.

Appendix D contains a few examples of actual user surveys. Some are for facilities that already exist, while others are for in-progress libraries.

The survey can be distributed through interoffice mail. You can either ask that the survey be returned via interoffice mail, or that the surveys be dropped in a central location, maybe a box in the lunch room. I happen to prefer that items come back via interoffice. If you seem to be getting a very low recovery rate, consider sending a friendly reminder notice via e-mail. Be sure to word this carefully. People's time is often very full at work, and adding to their work will not make the library very popular.

Once you have the returned surveys in hand, it's time to start reading. Keep track of how many surveys you sent out. A very low number of returns may indicate that your future users are not convinced of a library's worth to them. You will have to do some

heavy marketing. Be sure that you note all of the demographic data such as number of employees, average age and educational level, etc. All of this data will help you determine what type of resources to purchase for your library. If your survey asked what journal subscriptions each individual holds, be sure to create a list of who receives each title. You may find many duplicates that could save the company money. You may also find a great source for back issues!

Beyond the empirical data collected, these initial surveys are a good source for general impressions and attitudes of your user-base. A question regarding where they currently go for information can tell you a lot about their informational habits. These habits are what your library will need to blend with in order to be successful.

Beyond surveys, there are other methods of gathering data about your users. Focus groups such as your initial committee can be very useful. Discussing ideas and concerns with upper management can be a good way to market your library. Management that feels its ideas are appreciated is more likely to approve your library budget.

Regardless of what method you use to gain information about your user, it is imperative that your library remain in touch. An effective understanding of your users' needs is the only way the library can meet those needs and thus survive.

Further Readings

Collection Assessment Manual for College and University Libraries by Blaine H. Hall (Oryx Press, 1985).

The Collection Building Reader edited by Betty-Carol Sellen and Arthur Curley (Neal-Schuman Publishers, 1992).

Communicating with Library Users by Paula Berinstein (Special Libraries Association, 1994).

“Information-seeking Behavior: Patterns and Concepts,” by J. Krikelas, in Drexel Library Quarterly vol. 19 (Spring 1983), p. 5-20.

Chapter 4. Creating a Collection Development Policy

This chapter will describe how to complete one of the most important parts of setting up a new library. Creating a collection development policy for your facility will give structure and continuity to a previously ambiguous project.

Key Terms To Look For:

- **Collection Development Policy** — This is a written statement of the library's procedures that will ensure that the library remains true to its mission.
 - **Community** — This is the environment and users the library will serve. It does not necessarily include the public "community" outside your company.
-

Even if you're familiar with collection development policies, you may never have written one before. A review of the basics can help you if this is to be your first attempt.

What is a collection development policy?

A collection development policy is a written statement of the procedures and mission of the library. It outlines the parameters in which the library exists and serves as a framework for future decisions in the management of the library and its collections.

This policy will outline the goals of your library. It will answer questions such as the following:

- Whom does the library serve?
- How does it serve them?
- What does the library collect?
- What does the library not collect?
- Does the library specialize in particular subject areas?
- What are the circulation policies of the library?

It will clearly outline all policies that will affect the daily running and long-term management of the library facility. A well-written policy can be a true asset in the future.

It can serve as justification for decisions as well as clearly define library roles within the larger institution.

“A policy statement provides a framework within which individuals can exercise judgement” (Evans, 1995, p. 79). This framework will help you make decisions when there are no perfect solutions. It will also serve as justification for actions that may not always be popular. If your policy outlines your source of funding, and you are able to have the policy approved by your institution’s governing body, a board of directors, or CEO, then it can serve as a type of contract to ensure continued financial support.

Though each policy will be specific to each library, most collection development policies have the following sections: The Overview, Mission and Goals, Details of Subject Areas, and Formats.

1. The Overview. This section should clearly outline the community in which the library exists as well as a description of the user base. Your community is the organization in which you operate. If you are a law firm, state so and describe what type of law is practiced and how many lawyers are employed. How many clients do they serve? Do you support paralegals or only lawyers? Are you expected to serve the general public? Also describe how patrons will access the collection. Do they come to the library, or will you e-mail, fax, or hand-deliver materials?
2. Mission and Goals of the Library. Include here the mission statement for your library and the larger organization as discussed in Chapter 1.

3. Details of Subject Areas and Formats Collected. Include a “general statement regarding the parameters of the collection. What subject field will the library collect? Are there any limitations on the types of formats that the library will acquire” (Evans, 1995, p. 82)? Here is where you will state if you collect newspapers or not, whether you will keep microfiche, or if you will collect electronic media.

Briefly outline what services will be offered. Define whether your collection will circulate and for how long. Can people check out items, or are the materials for in-house use or reference only? Will you route journals? Will the library also support recreational reading or just company-specific information?

A good way to describe the level of collection is to use the American Library Association’s (ALA) five level system. This system says that you collect items in these levels of intensity: *comprehensive*, *research*, *study*, *basic*, and *minimal* (Evans, 1995). I would add the designation *not collected*. It is very rare that any library outside of large academic institutions will ever collect a subject *comprehensively*. To do so would mean to purchase anything and everything written or published in a subject area regardless of cost or format. Very few facilities have the budget and space for such a commitment. If you are a pharmaceutical company, your collection description might look like this:

Philosophy--	<i>Minimal</i>
Religion--	<i>Not Collected</i>
Social Sciences--	<i>Minimal</i>
Language--	<i>Not Collected</i>
Natural Science & Math--	<i>Basic</i>
Technology-Including Medical Science--	<i>Study</i>
Fine Art--	<i>Not Collected</i>

This layout will clearly show that the majority of funds should be spent in the area of technology and medical science, with secondary consideration to the natural sciences and math. Include a statement on how long items will be kept or retained. How many back years of journals will you keep? How old is too old for a text in your collection? Literature doesn't change, but computer technology may be out of date in a year or so. List any exceptions to the policy. For example, the library may have a policy of retaining texts authored by company employees regardless of age. Consider the nature of your information and determine a guideline.

This section should also include a description of who will be selecting materials. You may decide that only librarians will select, or you may wish to include a statement that indicates that title suggestions are welcome from patrons. Also outline how materials will be selected. Will all items go to a committee such as your advisory group? I recommend against that, as it is often very difficult to get a group consensus. In addition, it is important for you to project yourself as

an authority. Deferring to a committee on every item added to your collection may undermine your credibility as an information specialist. It is important that you believe in your worth and project it from the beginning. Your policy might state that the librarian selects independently within a budget. Possibly have the initial large purchase list approved by your review committee. Rarely will you spend so much in a lump sum, so outside approval may be a good idea.

You will also want to include whether or not you will duplicate items held by nearby libraries. You may decide not to duplicate items held by a neighboring collection. Before deciding this make sure that your staff will be allowed access to this collection. More ideas about inter-library agreements will be discussed in chapter 11.

Include within your collection development policy a statement on what will be used as selection guidelines. These will serve as criteria to assist in evaluating whether an individual item should be purchased. See figure 4.1 for some sample statements.

Figure 4.1

Select items useful to users.
Select items found in standard lists and catalogs.
Select only those items favorably reviewed in two or more aids.
Do not select items with a negative review.
Try to provide both or all points of view on controversial topics.
Do not select textbooks.
Do not select sensational, violent, or inflammatory materials.
(Evans, 1995, p. 89).

Beyond discussing what you will purchase and keep, the policy should outline when and why you will weed items. Getting rid of things may be the farthest task from your mind now, but having a clear policy will save many headaches later. There are many reasons for removing items from the collection. “Systematic removal from the collection of materials no longer useful is essential to maintaining the purposes and quality of resources. The discarding of materials requires the same degree of attention as initial selection and deserves careful study” (Carter, Bonk & Magrill, 1974, p. 40).

A good collection development policy should outline situations where items will be systematically removed. For examples of weeding policy statements see figure 4.2.

Figure 4.2

- Journals will be retained for five years. All issues older than that will be discarded.
- All texts proved to be inaccurate by subsequent authoritative research will be discarded.
- Any material found to contain insects or mildew will be immediately removed.
- Any item that has not been used, checked out or utilized in-house in two years will be discarded.

It’s important to note that “discard” does not necessarily mean tossed into the dumpster. You will want to draw up your procedure for discarding. Perhaps you will contact other local institutions and ask if they would like the item. If your subject area is appropriate, there may be shelters, community centers, or even correctional facilities that would love the item. Internet list servers (listservs) exist for the sole purpose of offering discarded materials.

Be aware that your collection may hold items that are company confidential. If this is the case, get the number of a secure shredding company. Your company may already contract with one; ask for a list of materials they will recycle. If your items are hardbound you may need to tear off the covers to facilitate recycling. Though the idea of this makes the librarian hairs on the back of my neck stand up, it is better than all that material just ending up in the dump.

Once the collection development policy is drafted, have your advisory committee review it. Make the necessary revisions and ask the committee to approve it. Once the document is accepted, consider it your license to operate your library. It's time to get moving!

Further Readings

Developing Library and Information Center Collections by G. Edward Evans (Libraries Unlimited, 1995).

Guide for Written Collection Policy Statements by ALA Association for Library Collections & Technical Staff (ALA, 1989).

“A Written Collection Development Policy: To Have or Have Not” by M. J. Bostic, in Collection Management vol. 10, nos.3 / 4 (1988), p. 89-103.

Collection Development Policies and Procedures by Elizabeth Futas (Oryx Press, 1995).

Chapter 5. Determining the Ideal Collection for Your Environment

This chapter will discuss how to ascertain what materials you need to have within your collection so that it may best serve the users. This will include the use of bibliographies as well as user suggestions and will list commonly used sources for evaluation of materials.

Key Terms To Look For:

- Selection Aids — Sources of reviews and publication information for newly released or soon to be released items.
 - Bibliographies — Lists of publications generally within a given subject area that include publication information.
-

Now is the time to select the materials that will fill all those shelves we discussed in chapter 2. Using your collection development policy as your guide, you are ready to start selecting items to fill your library. But now you are staring at empty shelves, and have no idea where to begin. This chapter should give you a few ideas. If you already have a rudimentary collection, you will now need to fill in any gaps so that your collection is up to date and useful to those you serve.

Depending on your field, there may be a recommended bibliography for your library. For example, the Medical Library Association publishes the “Brandon-Hill List.” It is a list of texts recommended for the small medical library. It is published in The Bulletin of the Medical Library Association (vol. 83, no. 2, April 1995). Bibliographies like this are available for many subject areas. Check with the library association that best covers your field. There is a list of some associations in Appendix A. If you are not sure where to go, contact the Special Libraries Association. They are likely to have great suggestions on available bibliographies.

Beyond bibliographies, there are a few other reliable ways to select materials.

Two of the most often-used procedures are faculty/staff recommendations and book reviews. Let's start with recommendations. There is a wealth of knowledge just beyond your library door waiting to be harvested. Staff within your organization work in the subject areas you will most likely cover on a daily basis. As such, they have a great awareness of the recognized experts in the field and the standard texts. Make use of this knowledge. Ask a select group for specific suggestions. If you are in a large organization, I would not advise that you ask the whole organization for titles, as you will have more than you can handle or afford to purchase. However, people at upper levels within the organization should have a higher level of expertise. In addition, the upper management will be much more likely to approve funding if they have been involved in the process. It would seem counterproductive to suggest a title and then not approve the money to purchase it!

Before you start spending money, check your organization's "mini libraries." "Many times a rudimentary library collection may already exist. Individual officers in the institution may have collected materials in their own offices" (Sager, 1992, p. 5). Beyond just suggesting texts, many senior staff may have copies in their office and may be willing to donate them to the library. This is a great way to begin to acquire books without breaking your first year's budget. Just be sure to check what strings come attached to those donations. Some may want the text to be used in-house. Others will want first priority access to it. As long as you are aware of these requirements prior to accepting the materials, you can make the necessary arrangements for that donation.

Another effective way to select materials is by use of book reviews. Read the authoritative journals in your field. Whether New England Journal of Medicine or The Harvard Business Review, these journals have book reviews in the back that help you decide what books would best serve your users. Many libraries have policies listing what review sources they will accept as justification to purchase an item. Reading reviews will also clue you into shifts in your field as they begin to happen.

This brings up a key point: **to be an effective special librarian, you must be reading in your field!** You must allot time every week to review those periodicals that will maintain your level of current awareness. Keeping up to date in your field will help you project yourself as an authority as well as keep you in tune with the needs of your users.

Beyond subject-specific review sources, there are a few publications with broader scopes. See figure 5.1 for a list of them. In addition to these sources, I highly recommend that you have on hand a good periodical directory. This is a complete list of current serials. It will list the publishing information, as well as a price, though you should contact the publisher for recent rate changes. Now that the world has gone hi-tech, you should also have a directory of electronic periodicals. This will list available sources for fulltext and abstracted journals available in the electronic format. We will discuss electronic journals more in chapters 10 and 11. In the meantime, make note of the directory titles listed in the “Further Readings.”

Figure 5.1

- *Publishers Weekly*—This source covers many subject areas and includes reviews provided by the publishers. “Reviews tend to be somewhat more generous than they might be in a more critical publication” (Berner & St Clair, 1990, p. 75).
- *Choice*, *Library Journal*, and *Kirkus Reviews*—Reviews in these periodicals are written for the librarian. Generally these reviews are out before the book is even available.
- *Forthcoming Books*—This periodical is more of a list than a source for reviews. However, it is just the place to let you know what’s coming out before it hits the shelf (Berner & St Clair, 1990, p. 76).
- *Amazon.com*—<http://www.amazon.com> is an online virtual bookstore accessible via the Internet. It is searchable by keyword, author, title, and International Standard Book Number (ISBN). Books listed generally have an abstract as well as several reviews. The only drawback is that these books are already published, not what’s coming. But as far as books that are currently in print, it nearly replaces *Books In Print* (Kim Laru, San Diego County Water Authority Librarian, personal communication, January 26, 1999).

The most basic and essential way to decide on whether or not to purchase a particular item is to return to your collection development policy. Does this item fit the criteria of what that policy says you will collect? Would owning it further your library’s purpose to meet its mission statement? Is it unique to your collection? Depending on

your answers you may want to buy that item. How you pay for it and where you get it will be dealt with in the next chapter.

Further Readings

The Collection Building Reader edited by Betty-Carol Sellen and Arthur Curley (Neal-Schuman Publishers, 1992).

Developing Library and Information Center Collections by G. Edward Evans (Libraries Unlimited, 1995).

“Growing the Collection” by J. Grim, in Wilson Library Bulletin, vol. 68 (February 1994), p. 31.

CD-ROM Periodical Index: A Guide to Abstracted, Indexed, and Fulltext Periodicals on CD-ROM by Pat Ensor and Steve Hardin (Information Today, Inc., 1998).

Ulrich’s International Periodicals Directory 37th ed. (Bowker, 1999).

Section III Getting What You Need

Chapter 6. Preparing a Budget

This chapter will discuss methods of budget creation. This will be done using a line-item budget format. Descriptions of often-used columns and their contents will be looked at.

Key Terms To Look For:

- **Budget** — Description of funds available to the library or the amount of money allotted for the running of the library.
 - **Line-Item** — Format of budget often used that shows how much money is needed for specific areas of operation.
 - **Charging Back** — A library charging the user for particular services.
-

Now that you have a list of materials that you want, how do you pay for them? If they are not available on site, you will have to purchase them. No matter how esoteric your plans are for your new facility, attention must be given to a budget. This doesn't have to be as frightening as it sounds. Basically, it is the preparation of a list of incomes and expenditures. A budget may or may not have been done prior to your arrival. Your company may have already set aside a predetermined amount of funds for set-up costs. But rest assured, next year you will have to produce a budget proposal. The following chapter will show you how.

In its most rudimentary form, the budget proposal is a list of expected monetary expenditures for the coming year. Your organization may run on a calendar year, January through December, or fiscal year, usually July through June. Your budget should be ready to be submitted for evaluation well before the start of the new budget year. Find out who you will be submitting it to (who decides on your funding) and what type of

budget they want. “There are numerous ways for budgets to be organized, but the most common method is called line-item budgeting, which lists expenditures by subject” (Sager, 1992, p. 5). Other methods include “formula budgets, lump-sum budgets, program budgets, and zero-based budgets” (Warner, 1998, p. 7). For the purposes of this chapter we will be using the line-item budget.

The line-item budget is laid out just as its name suggests. Each item requiring a monetary expenditure is given a line on the spreadsheet. The spreadsheet may have as few as three columns. The first would be the item itself, say “Personnel.” The second column would be a description of what that item covers. The third column would then be your total expected expenditure for that item. See figure 6.1 for a sample section of a budget, for a complete budget see appendix E. Check with your organization about formatting questions such as whether you may abbreviate or if they really want full sentences. I say the more concise the better. Also, ask to see a copy of last year's budget if one exists.

Figure 6.1

<u>ITEM</u>	<u>DESCRIPTION</u>	<u>1999 Expenses</u>
Personnel	1 Librarian position	35,000
	2 assistants @ 10 hours a week	<u>8320</u>
		43,320

When you have listed all of your items, add the right-hand column to come up with the total budget. Keep in mind that what you ask for is not always what is given. While I am not suggesting the practice of purposefully “padding” your budget, remember that if you never ask for it you’ll never get it. So list items that would assist the library in

meeting its mission statement. If another computer terminal is needed because there is always a wait for the one you have, ask for it, even if you doubt you'll get it. List a justification briefly in the second column and **be prepared to back it up**. You may be pleasantly surprised by an approval. You may not get approval this year, but keep listing your needs. Persistence may pay off with an approval next year.

So what sort of items should you list in your budget? Here is a list of a few:

- Personnel
- Books
- Journals
- Equipment and furniture
- Multimedia (microfiche, videos, audiovisual, etc. Depending on what you collect)
- Fees for online database contracts
- Document delivery services
- Computers (hardware, supplies, maintenance)
- Computer software (systems used to run your library, new CD-ROMs would probably be under "Multimedia")
- Professional development for the librarian (membership in a professional association as well as conferences)

Some companies figure expenditures on a monthly basis. "If your company breaks your line-item budget into monthly increments (a very common practice), be sure you load your budget appropriately. If your serials come due in June, then put 30% (or whatever percent serials is of your budget) into June" (Sue Brewsaugh, personal communication, April 2, 1999). Using a serials vendor (discussed in chapter 7) can help with timing your serials budget.

In the corporate environment you most likely will not have to list items such as rent, utilities or office supplies as these are covered by the parent organization. You may

also want to ask to what extent you must fund your furniture. It has been my experience that basic office furniture such as desks and file cabinets are covered by the larger company-wide budget, but library specific items, such as microfiche cabinets, kick stools and special shelving, are part of the library budget. Also ask about computers. Some companies' computer departments supply computers for all areas of that company. They may pay for your new terminal provided you let them know you will need one next year so that they may include it in their budget. Again, if you don't ask, you may end up spending money you didn't have to.

After your first year, your budget should expand in detail. Now you should show columns such as "Last Year's Budget," "Last Year's Actual," "Current Year," and "% Change." This will help you see areas that were miscalculated last year. If you only used 50% of your multimedia budget last year but went 5% over budget in copying, then clearly these are areas of the budget that must be adjusted this year. I want to comment about overuse or under use of funds. Some companies will not let you go over budget. If you run out of money, that's it you're done. Likewise, in some companies if you do not use the money allocated for a specific area, you will not be given those funds in the next budget. I say this not to scare you, just merely to emphasize the importance of careful and accurate accounting.

Now that you know how much you need, it is time to figure out where you're going to get it. This may sound obvious: from the folks upstairs. But before you turn in your budget you need to decide a few things about your library funding. Do you want to create your own revenue? What this means is do you want to charge for services? Now,

you may have a knee-jerk reaction to the idea that a library would charge for its services but remember you are not a public library. This information facility exists within a business, and you may need to generate revenue to survive. "The library is a business. It isn't somebody's hobby, and it can't be run as such" (Berner & St Clair, 1990, p. 32). On a personal note, I would try to avoid charging back if you can. The amount of time spent in bookkeeping may eat up more personnel funds than the exercise generates. But in some cases it may be necessary. Charging back for certain items may be the only way your facility can afford the more expensive services. For example, if you have a contract with an on-line database that charges you by the minute or hour for searching you may decide to charge the department requesting the search for the cost of the search.

Charging for certain services may be a way to save yourself some time. A fellow solo-librarian found that he was spending the majority of his time photocopying pages for a particular user. Not wanting to limit his service to others, he came up with a creative way to eliminate the problem. The library instituted a policy of charging copy fees for all requests totaling more than 25 pages a month (John Grant, Quintiles Information Specialist, personal communication, December 15, 1998). Magically this user's department urged the user to do some copying themselves.

There are mixed opinions regarding the value of charging back. KEMA's corporate library charges its users for all services. "The billing of users has allowed the company to maintain the quality of services offered by the library. Moreover, users have come to realize the true value of the library because they have to pay for its use" (Grotenhuis & Heijnekamp, 1995, p. 110). Ashland Corporation's library also has a

policy of charging users. The library budget is covered in equal halves by management subsidy and user fees. "The fees which were developed are charged to the user's departmental budget for the following services: journal circulation, literature and patent searches, monthly current awareness searches, patent or photocopies provided, translations arranged, and laboratory notebooks issued. Fees include staff time as well as out of pocket expenses incurred in providing services" (Ratliff & Weeks, 1995, p. 21).

If you do decide to charge for services, be sure to include that in your budget. List your revenues just as you did your expenditures, one item per line, a description, and the anticipated amount. You will need to get the feel of your institution on the idea of charging. In some places it is expected, in some it would seriously jeopardize your usage. There are positive and negative aspects to either decision regarding charging. Some feel that charging means a more effective use of the librarian's time. Others feel that people will be afraid to use the library if they will be charged. Whatever your decision, be sure that the library's policy is clear to all users and has the approval of the larger institution.

Once your budget is established, you will have to discover your company's favored method of spending from an allotted budget. Will you be issued a company credit card with which to purchase library materials? Does the company require you to present invoices for payment? Your company may prefer the use of purchase orders (POs). Whatever method of payment your company prefers will effect your relationship with the sources you purchase your supplies from. We will discuss those sources in the next chapter.

Further Readings

Budgeting; a How-To-Do-It Manual for Librarians by Alice Sizer Warner (Neal-Schuman Publishers, 1998).

Money Talk: Accounting Fundamentals for Special Libraries by Madeline J. Daubert (Special Libraries Association, 1995).

Owning Your Numbers; an Introduction to Budgeting for Special Libraries by Alice Sizer Warner (Special Libraries Association, 1992).

Chapter 7. Researching A Vendor

This chapter will discuss the most time and cost effective ways of acquiring your selected materials. Acquisition methods will include the use of vendors as well as local sources.

Key Terms To Look For:

- Vendor — An outside company that provides a service or materials to the library.
 - Rep — A single person assigned by a vendor to interact with your facility. He or she represents the company to you.
 - International Standard Book Number (ISBN) — A number is assigned to every new book that is published. It serves as a unique identifier for every text.
 - Bibliographic Citation — The information about a book that includes the title, author, publisher, and date of publication. If the citation is of an article, it will include the journal the article was published in, as well as the volume, date, and number of the issue plus the pages it appears on.
-

You have the money and you have the titles. So where do you get the items you have determined your library needs? If your immediate answer is, “Head down to the local bookstore,” please read on. There are a few options regarding purchasing your materials.

Sometimes going directly to the publisher is your best bet. For example, at the library I run, we provide every staff member with *The Nursing Drug Handbook*. This is a reference that all employees use on a nearly daily basis. In ordering 500 copies, I went directly to the publisher. In explaining that I would be purchasing a large number of texts every two years, I was able to get our company a pretty significant discount. I paid no taxes or shipping, and was given close to 15% off of the list price. But for individual texts, the publisher will most likely refer you to a retail vendor.

You can also go through a vendor. These companies purchase texts in volume and can sometimes pass the savings on to you. They are sometimes referred to as “book jobbers.” You can provide them with the information on the materials that you want, and they will acquire them for you. The vendor can ship them to your library directly from the publisher, or can provide the additional services of cataloging the items and labeling them. We will discuss these extra services more in chapter 9. One of the advantages of using a vendor is that you can negotiate for the best deal if you plan to purchase a large volume of books to “jump-start” your collection. If you are ordering from a vendor outside of your state, you may not have to pay sales tax. Also ask about a volume discount. When I order my texts, the vendor pays all shipping costs.

The best way to find out about vendors is to ask other librarians in your area. They may know of a local source that is the best in your subject area. So how do you find other librarians in your area? Check out the association listing in Appendix A. The best place to start is the Special Libraries Association (SLA). They can give you information about local chapters and members. **SLA even offers a consultation service. They will send a librarian to come meet with you for a few hours to help you define where you’re going and what you need to do to get there. It is a wonderful service. Make use of it! They will give you a current SLA membership directory. Keep it! These are the people you will call on when no one else has the answers you are looking for.**

Beyond associations, there are some very useful resources for finding book sellers. One resource is the annual Librarian’s Yellow Pages. It is free for the asking.

Just contact the publishers, Garance, at 1-800-235-9723 and ask them to send it. The 1998 issue had 13 pages of book vendors listed. It even had listings for vendors specializing in foreign language texts. For those of you with offices in Poland, guess what? There's a book source just for you! For those of you in other subject areas, there are vendors for you, too. These include medical and health sciences, law, genealogy, and science and technology.

Once you have a few vendors selected, contact them and ask for a bid on your list. Send your materials list to three or four vendors. Tell them that you are gathering bids, and wait to see what kind of service and pricing you get. If you like one company's representative better than the other but they are more expensive, ask them to beat the other company's price. They usually will. Rapport with your rep can be very important. He or she may even be an expert in your subject field. While I'm not suggesting you let the rep make your acquisition decisions, you can certainly listen to advice. Having multiple bids will also help assure management that you are cost conscious.

A note here on how you request items. When you send vendors your list, include as much bibliographic information as is available. This will help lessen the chance that you get the wrong book. Many items have the same title. Including the author, publisher, and publication date is always wise. But beyond that, whenever possible, include the *International Standard Book Number* (ISBN). It is unique to each book. "To verify this information or obtain missing elements of this bibliographic citation, you should consult a very basic tool known as *Books in Print* or more commonly known as *BIP*" (Sager, 1992, p. 12). This can be purchased in print or electronic version. Quite

often sales information on a book will include all of this bibliographic information. Using it will ensure you get exactly what you asked for. If you do not have access to *BIP*, try using Amazon.com. As discussed in chapter 5, this Internet source can usually retrieve the same bibliographic information as *BIP* (Kim Laru, San Diego County Water Authority Librarian, personal communication, January 26, 1999).

Beyond just sending you books, vendors usually have a variety of other services available. Many have a range of delivery options, from just sending the book as is, on through to cataloging it, labeling and sending it “shelf ready.” We’ll discuss these options more in chapter 9.

Book providers are not the only vendors out there. Serials can be ordered through vendors as well. Using a serials vendor can benefit you in many ways. First, if you order a large number of titles the vendor may be able to offer you a discount. But beyond money, they can save you time. Centralizing your renewals through the vendor means that you only deal with it once a year, rather than renewal notices trickling in throughout the year. This can also help with your budget, in that you know exactly when this one bill will arrive thus making it easier to plan. Vendors may also offer services such as tracking lost issues and replacing individual copies. A few of the large serial vendors are EBSCO Information Services and FAXON. For names of a few more grab your [Librarian's Yellow Pages](#) and look under “subscription agencies.”

Beyond serials vendors you will also want to look into electronic sources. Online databases allow your library access to very current information without taking up much floor space. In some cases you can get news feeds that are only 15 minutes old. Talk

about being current! Electronic media also gives you so many more options in how you will delivery your information to your user. We will discuss this further in chapter 11. For now suffice it to say that I urge you to look into what some of the online databases can do for you.

There are several large on-line database companies as well as a myriad of smaller more specialized systems out there. Some of the very large databases allow you access to smaller databases through their systems. For example, DIALOG allows you to search medical databases as well as business and news wires. Other large databases are LEXIS-NEXIS, ABI/INFORM, NORTHERN LIGHT, and DATASTAR. All of these companies have reps that will be more than happy to send you information about their system and what it can do for you. Don't be shy about asking for a free trial. Why should you pay for something that you haven't seen work? Database vendors usually offer any where from one week to 60 day trials to allow you to get familiar with their system. Be sure to ask about their licensing agreements. The exact wording can strongly effect how you can use it. We will discuss licensing further in chapter 11.

There are several options open to you when you are ready to actually order the materials needed for your library. Remember that whatever source you use, they are a business. Vendors and other book sources compete with each other. If you aren't getting the services or prices you like take your business dollars somewhere else.

Further Readings

Buying Books for Libraries by Liz Chapman (ALA, 1988).

The Librarian's Yellow Pages (Garance, Inc., 1998).

“Librarians and the Salesperson: Allies or Enemies?” by S.A. Strussy, in Catholic Library World, vol. 57, (May/June 1986), p. 274-77.

<http://www.amazon.com>

Section IV Organizing It All

Chapter 8. Deciding on a Catalog or Organizational System

This chapter will discuss the importance of choosing an organizational system for the library. It will cover the two main classification systems as well as discuss various types of public access catalogs.

Key Terms To Look For:

- **Classification** — Process of assigning a number, letter, symbol, or some combination of these to a book or other library material so that it may be shelved, filed, or grouped together with similar or related materials.
 - **Catalog** — Mechanism used to allow the library user to search through what the library owns by use of the title, author, subject, or other access point.
 - **Call Number** — Code given to an item in the library's collection during classification that determines its place on the shelf. This code often gives additional information about the subject of the item as well as the author's name.
 - **Dewey Decimal Classification System (DDC)** — Classification system designed by Melvil Dewey using a ten-base numbering system.
 - **Library of Congress Classification System (LC)** — Classification system is used by the Library of Congress of the United States. It uses notations of letters and numbers to represent the subject and author of the item.
 - **OPAC** — Stands for "Online Public Access Catalog." Allows users to search and view the library's holdings through a computer system.
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Before getting into the depth of this chapter, I want to explain that much of what is covered within this chapter will be a review for many of you. This chapter will review the Dewey and Library of Congress systems as well as talk briefly about alternative numbering systems. If you already have extensive experience with cataloging, most of this material will already be a part of your knowledge base.

Deciding how you will organize everything is a fundamental part of the library structure. As such, it can seem overwhelming. This chapter will help to sort things out.

But now that books will be arriving any day, it's time to get serious. You need to decide how items will be placed on the shelf and how library users will access them. Let's outline what this means by asking a few questions.

- Are there books on the shelves already?
- If so, how are they organized— by author, by title, by call number?
- Does that system work well? Are people able to find what they need?

If there is no system currently in place then you are starting from scratch. In some cases this is easier. If there is a system in place and it isn't working well, I would seriously consider starting over. It will never be easier than right now before you have many more books. If there is a system and it seems to work well (i.e. people can find what they're looking for) then keep on using it.

This chapter is for those of you who are starting over or starting from scratch. You are going to decide what type of classification system your library will function under. This system will govern how your materials are organized. For those of you completely new to cataloging, you should at least be comfortable with how a classification system functions within a library.

I strongly recommend that you seek out a course on cataloging. Your local chapter of the Special Libraries Association (SLA) can most likely recommend one. For contact information for SLA see appendix A.

Your public library probably uses the Dewey Decimal Cataloging System (DDC). Without giving you a history of library science, suffice it to say that the DDC uses a ten-based number system. That means there are ten main subject areas: philosophy, religion, social science, language, science, technology, the arts, literature, geography and history,

and generalities. Within these subjects there are another ten sub-divisions. This means that not only does a Dewey Decimal number tell you where to put the book, it also tells you about the book.

The Library of Congress system, or LC system, also shelves materials by subject. Instead of a ten-based numerical system, LC starts with the alphabet. (See figures 8.2 and 8.3 for a break down of both systems.)

From a practical point of view, if your subject area is very narrow like medicine or law, use the LC system. Narrow subject area collections in Dewey tend to end up with numbers too long and too similar to nearby items. Users get lost trying to differentiate between 861.746356 and 861.746889.

Fear not, if both of these systems sound nowhere near what you need. There are other ways of doing things. It is possible to design your own system. For example, if your library collection consists of company documents, you may choose to use a date-filing system. If your stacks are not open to users and you will be entering everything into an automated database, then shelving by subject is much less of an issue. You could use call numbers starting with the year of publication followed by a sequential number to identify each document. The first document you receive this year would be 1999-1, the second 1999-2, etc. (Remember to plan for the millennium. Don't just use 99.) The resulting collection would be shelved numerically by date of publication.

If your collections are largely comprised of materials other than "traditional" print items such as books, then an alternative numbering system may be what you need. In some cases trying to fit an internal corporate report into either the LC or DDC systems is

just not worth the effort. Consider how it will need to be accessed. For example if you are in charge of retaining all of your company's quarterly statements, people will probably ask for them by date... "Do you may the first quarter report from 1997?" In this instance creating a numbering system by date would be the way to go. See figure 8.1 for an example of this system.

Figure 8.1 Alternative Numbering System

1997-1	The first quarter's report for 1997.
1997-2	The second quarter's report for 1997.
1997-3	The third quarter's report for 1997.
1997-4	The fourth quarter's report for 1997.
1998-1	The first quarter's report for 1998.
1998-2	The second quarter's report for 1998.
Etc.	

To design your own system, it is important to know your users and how they will most effectively locate materials. Computers make all of this much easier. Databases allow the user to search using a variety of fields. Those fields are only limited by what you enter into the catalog. "This is not an either-or situation. Many special libraries use LC or Dewey for books but have an accession number system for reports or other documents" (Sue Brewsaugh, personal communication, April 2, 1999).

This brings us to the second half of your library organization system. How will your user search for items? What mechanism will patrons utilize to find the information they are seeking? In other words, are you going to use a card catalog, a printed list, or an automated catalog? Some libraries use all three.

Dewey Decimal Classification**Figure 8.2**

000	Generalities	500	Natural Science & Math
010	Bibliography	510	Math
020	Library & Information Science	520	Astronomy
030	General Encyclopedias	530	Physics
040		540	Chemistry
050	General Serials & their indexes	550	Earth Sciences
060	General Organizations & Museology	560	Paleontology Paleozoology
070	News, journalism, publishing	570	Life Sciences
080	General Collections	580	Botany
090	Manuscripts and rare books	590	Zoological sciences
100	Philosophy & Psychology	600	Technology (Applied sciences)
110	Metaphysics	610	Medical science- medicine
120	Epistemology, humankind	620	Engineering & allied operation
130	Paranormal phenomena	630	Agriculture
140	Specific Philosophical schools	640	Home economics
150	Psychology	650	Management & Auxiliary services
160	Logic	660	Chemical Engineering
170	Ethics	670	Manufacturing
180	Ancient, Medieval, Oriental Philosophy	680	Manufacturing for Specific uses
190	Modern world philosophy	690	Buildings
200	Religion	700	The Arts
210	Natural theology	710	Civic & landscape art
220	Bible	720	Architecture
230	Christian Theology	730	Plastic art and sculpture
240	Christian moral & devotional theology	740	Drawing & decorative arts
250	Christian orders & local church	750	Painting & Paintings
260	Christian social theology	760	Graphic arts & print making
270	Christian church history	770	Photography and photographs
280	Christian denominations and sects	780	Music
290	Other & comparative religions	790	Recreational & performing arts
300	Social Sciences	800	Literature and Rhetoric
310	General statistics	810	American Literature in English
320	Political Science	820	English & Old English Literature
330	Economics	830	Literature of Germanic languages
340	Law	840	Literature of Romance languages
350	Public administration	850	Italian, Romanian, Rhaeto-Romanic
360	Social services	860	Spanish & Portuguese literatures
370	Education	870	Italic Literatures and Latin
380	Commerce, communications, transport	880	Hellenic literature & Classical Greek
390	Customs, etiquette, folklore	890	Literature of other languages
400	Language	900	Geography & History
410	Linguistics	910	Geography & travel
420	English & Old English	920	Bibliography, genealogy, insignia
430	Germanic languages, German	930	History of ancient world
440	Romance languages, French	940	General history of Europe
450	Italian, Romanian, Rhaeto-Romanic	950	General history of Asia, Far East
460	Spanish & Portuguese languages	960	General history of Africa
470	Italic languages, Italian	970	General history of North America
480	Hellenic languages & Classical Greek	980	General history of South America
490	Other languages	990	General history of other areas

(Sager, 1992)

Library of Congress Classification**Figure 8.3**

A	General Works	PN	General Literature.
B-BJ	Philosophy, Psychology	PR	British Literature
BL-BX	Religion	PS	American Literature
BL, BM	Religions, Hinduism	PZ	Fiction in English & Children's
BP, BQ	Judaism, Islam, Buddhism	PQ, Part 1	French Literature
BX	Christian denominations	PQ, Part 2	Italian, Spanish, Portuguese Lit.
C	Auxiliary Sciences of history	PT, Part 1	German Literature
D	History: General & Old World (Eastern Hemisphere)	PT, Part 2	Scandinavian and Dutch Literature
E-F	History: America (Western Hemisphere)	P-PZ	Language and Literature Tables
		Q	Science
G	Geography, Maps, Anthropology	QA	Math and Computer Science
	Recreation	R	Medicine
H-HJ	Social Sciences: Economics	S	Agriculture
HM-HX	Social Sciences: Sociology	T	Technology
J	Political Science	U	Military Science
K	Law (General)	V	Naval Science
KD	Law of United Kingdom and Ireland	Z	Bibliography; Library Science
KDZ, KG-KH	Law of Americas, Latin America, and West Indies		
KE	Law of Canada		
KF	Law of United States		
KK-KKC	Law of Germany		
L	Education		
M	Music		
N	Fine arts		
P-PA	General Philology and Linguistics		
PA Supplement	Byzantine and modern Greek literature		
PB-PH	Modern European Languages		
PG	Russian literature		
PJ-PM	Languages and Literature of Asia, Africa, Oceania, American Indian Languages, Artificial languages		
P-PM Supp.	Index to languages and dialects		

(Sager, 1992, p 77)

A card catalog generally consists of three types of files in which cards are entered with information about each item. Each book will have a card filed alphabetically by the author's name, the title of the work, and by its subject. Each item may have more than one subject, therefore more than one subject card. This type of system works well if your user knows the author or the title of the item they are looking for. It also works well if you have been very specific about assigning subject headings to each item, as will be discussed further in the next chapter on cataloging.

Where the card catalog tends to lose effectiveness is when the cataloging has been inconsistent or if users want to search for specific information. A book with one chapter on a particular topic may not have that topic reflected in the larger subject heading. This problem also arises with the use of a printed list. The lack of multiple access points poses a problem in complex collections as it can hamper the users' ability to locate exactly what they need.

Another method of accessing the collection, though rarely used anymore, is the printed list. It is basically a listing of every item a library holds in its collection. There is a list of all titles, all authors, and all subjects. Again, a high degree of specificity is difficult. An added difficulty with this system is that every time you add a new item, or remove an item, you have to reprint the list to keep it current. If that isn't done on a regular basis, the catalog becomes outdated quickly.

If it is beginning to sound as if I am biased toward an automated catalog, you're right. An automated system allows users to search in a much more flexible fashion than the traditional rigid subject headings. Users can use key word searches to scan entire

records and find data that would otherwise have been missed. Automated systems can also tell users when an item is checked out and when it is expected to return. Many systems even allow the user to place a hold on that item so they will be notified when it is returned. These things just are not possible with card catalog systems. Libraries with electronic catalogs provide four basic services:

1. Provide access to local collection of the books, journals, and other materials on your shelves.
2. Offer information about resources in other library collections and access to using interlibrary loan and document delivery.
3. Facilitate off-site electronic access to users from outside the library, i.e. network access.
4. Provide access to the user, human assistance in locating the information to fulfill their needs via electronic sources when the user is in a remote location.

(Cohn, Kelsey & Fiels, 1997, p. 3)

In today's corporate environment, technology is the buzzword. To be an effective corporate librarian you must have computer skills. Having an automated or computerized catalog system can allow you to get the needed information to the user faster and more effectively than with any other method. For that matter, you can use the company's in-house network and allow users to access the catalog from their desktops with little fuss. The company's network, simply defined, is the electronic connection of all the computers in the company that allows those computers to communicate with each other. There are

also web-based products that can be supported by your company's intranet (similar to the Internet, but confined to sites within the company) and allow access to everyone. This would allow users to search your collection from the computer on each employee's desk. Talk about increased ease of access! So let's look at automation. (If the last few sentences lost you, ask your computer department to discuss the networking of company information with you.)

Before you start panicking, know that you don't have to become a programming guru to create your own system from a blank screen. There are quite a few vendors out there who are more than willing to help. There are database systems available for purchase at costs ranging from a few hundred to several thousands of dollars. A good source for vendors is, again, The Librarian's Yellow Pages. The most basic needs of every library are a public access catalog (PAC) and a cataloging module. You can add circulation, serials (journals), and other "goodies" to create the system that will best meet your local needs with additional software programs. SLA can even tell you what other libraries are using a particular product. Call those other libraries and ask to visit and view their catalog. Nothing beats seeing the real thing working in a real library.

Contact vendors and ask them to send you a proposal outlining features and cost breakdown for their automated systems. You should be able to compare the functions of each system, the initial cost, what maintenance is needed, and technical and training support available. Many systems have limits as to how many records they can hold. Look at your collection and choose accordingly. Keep in mind that you want this system to remain viable for many years, so expandability of systems will be an asset. You will

also want to ask about the cost of a network copy versus multi-user license fee versus a web version that can run over your company's intranet. The difference between these systems has to do with the number of people gaining access at one time. Additional discussion of licenses will be covered in chapter 11. Get your computer department involved in the selection. Even if you are only purchasing a single user copy for use in the library, you will want them involved. Who knows, the cost of computer software may even come out of their budget instead of yours! It never hurts to ask.

When looking for an automated system, have in mind the functions you desire. Some sample requirements of other libraries are:

- **System must provide multiple search modes to accommodate different users.** Different users have preferred methods of searching. Some search by subject headings, some by key word, some by author or title. Systems should offer users a variety of searching methods so that they will be able to access the information in a manner that fits their pattern of use.
- **System must support individual, protected access to user-specific information.** There are usually areas of a library catalog that you do not want everyone to be able to access. For example, information such as whom has a particular text or a list of what an individual user currently has checked out, should be accessible by only the librarian and the user. This may be particularly true in a company that has multiple teams

working on different projects. "Our company has signed confidentiality agreements with each sponsor we contract with. It is imperative that no one have access to any information that might give a clue as to the nature of what other teams are working on. Materials checked out from the library must be confidential" (John Grant, personal communication, September 18, 1998). An automated system should allow the library to determine areas of the catalog that can only be accessed using a password.

- **System must provide online search aids, such as spell checkers, dictionaries, and thesauri.** An effective system will have help files built into the system. These files might include a spell checker, or dictionary, so that a user will not be unable to access information simply due to a spelling error. Additional help files might include a list of all subject headings in the system that a user could browse and select from. A thesaurus should suggest parallel terms that will retrieve better results. For example, if a user enters "clinical studies" the system might suggest "clinical trials" as a similar term that will yield better results.
- **System must support printing, downloading, and exporting search results to disk files, paper, or into other software**

applications. Exporting allows the user to take the information found within the catalog with them without having to transcribe it by hand. Some users may want to print the exact screen, others may wish to download the information to use later with a word processing program. A good system should be able to support these needs.

- **System must provide customized management reports on user access to the system.** This feature is for the librarian rather than the user. The system should allow you to determine what information you would like reported on an ongoing basis. For example, you may want a weekly report of how many texts from each subject area were checked out. You will want a daily report of all overdue material. If you track in-house use on your system, you will want a daily report of how many times each item was used. Statistics like these will be discussed further in chapter 13. Another example would be if your collection were somehow damaged, being able to print a report of the cost of each text would greatly help with any insurance claims.
- **System must support major authorities and thesauri including, Library of Congress files, Medical Subject Headings, and Sears— as well as major classification**

systems such as DDC, LC, and Su DOC. These are some of the major subject headings used in cataloging. Other subject areas, such as engineering, have their own subject heading guides. The system should allow for the use of any of these systems. Most automated systems on the market will allow you to download catalog records directly from the Library of Congress into your system.

(Cohn, et al., 1997)

These specifications will allow the library to choose between only those systems that will meet their needs. Maybe you are not exactly sure what your needs are yet. That's okay. Then one of your requirements may be the flexibility to add features later that will allow you to expand your database without starting over. This expansion can be done by adding additional software modules at a later date. However, this usually costs more than buying the entire package from the start. **Make sure that whatever system you purchase is compatible with your company's existing systems.**

This may have seemed too brief a chapter to describe how you are to organize your library. After all, isn't that the main function of a library? You're right. Also, it is often the most frightening part of setting up a library. So we will deal with it in two parts. Chapter 9 will discuss the specifics of cataloging and classifying materials. Chapter 10 will.....

Further Readings

Planning For Automation by John Cohn, Ann Kelsey, and Keith Michael Fiels
(Neal-Schuman, 1997).

"What Have You been Signing? A Look at Database Licensing Agreements" by
Edward A. Warro, in Library Administration & Management vol. 8, (Summer 1994),
p. 173.

"Picking the Best Databases" by Carol Tenopir, in Library Journal vol. 120, (July
1995), p. 26.

"Database Producers Go Online" by Carol Tenopir, in Library Journal vol. 121,
(April 1996), p. 31.

Chapter 9. Cataloging

This chapter will continue the discussion of cataloging. Chapter 10 will delve more deeply into the process of classifying and cataloging individual items. The practice of copy cataloging will be introduced as well as the idea of purchasing items pre-cataloged.

Key Terms To Look For:

- Cataloging — Describing an item, such as a book so as to facilitate a user locating the item.
 - Subject Headings — Terms assigned to an item that are designed to represent what the item is “about”.
 - Outsourcing — Contracting with an outside vendor or person a task that is traditionally completed by library staff.
 - Cataloging In Publication (CIP) — Cataloging information often printed inside the actual text. This occurs most often in books published after 1985.
-

As with the previous chapter, much of this discussion of cataloging will be review for you, especially if you have cataloged in a previous position. For those of you who are new to the area of cataloging, there is no way that the process of cataloging can be completely explained in this brief format. This chapter is intended as an overview. I urge you to make use of the “Further Readings” list.

Cataloging may sound like a very foreign science, but it doesn’t have to be. The cardinal rule is consistency! As discussed in the previous chapter, you have some choices as to what classification system you will use. Accuracy of cataloging and classification is the key to the success of any library. If the collection is not cataloged or classified well, then the users will be unable to locate the information they are seeking. Whether you decide to use a card file or an automated system, your catalog must contain some basic information about each item. Anything that someone might use to search for the book (or other item) should be included. This will include the author, title, subtitle,

any series name, subject heading(s), and location on the shelf via a call number. In a special corporate library you may be adding fields not usually found in the public or academic library. For example, if your library handles competitive intelligence, you may add a field for all company names mentioned in the item, not matter how seemingly small the reference is.

You will also want to include all the information about how you acquired the book. This will include the publisher, the ISBN, the date of publication, and the list price as well as the price you paid. This will assist you in the event that the item needs to be replaced due to damage or loss as well as assessing the monetary value of the collection for insurance purposes (Kim Laru, San Diego County Water Authority Librarian, personal communication, January 26, 1999).

There are standards for cataloging used in most libraries. The AACR2, or Anglo-American Cataloging Rules, 2nd Edition, is the most widely accepted format for official cataloging. However, its difficulty does not make it the ideal guide for the small corporate library. It is extremely lengthy and the rules are complex at best. If your library chooses not to use this format, then a good standard is to use the title page of your item and note things exactly as they appear. This means if no subtitle shows on the title page, don't list one in the catalog.

Creating subject headings and call numbers require a bit more work than the rest of the cataloging task. Let's review some of the widely accepted references on subject headings. One such reference is Sears List of Subject Headings. This is a list of subject headings derived from the Library of Congress Subject Headings (LCSH) for use in the

small library. While it used to only list call number ranges in Dewey Decimal Classification system (DDC), it now lists them in Library of Congress (LC), as well. I am of the opinion that Sears is more useful than the other more comprehensive reference sources for a new corporate library. When choosing subject headings, keep in mind that you do not have to choose just one heading that describes the item you are cataloging. In fact, you can select multiple subject headings. This is the advantage of an automated system in which can post multiple entries. You can use multiple subject heading entries with a card catalog system, as well. However, after using two or three subject headings for one item, the card catalog system becomes cumbersome.

Beyond the general guides like Sears and LCSH, there are other options. "Any good thesaurus (or good list for that matter) can act as your subject heading guide. The National Library of Medicine (NLM) [list] is often used in some medical libraries, NASA is [used in] space oriented libraries, DTIC in defense. Other special libraries create their own. It is not required to use *LC* or *Sears*" (Sue Brewsaugh, personal communication, April 2, 1999). Contact an association that covers your subject area (see the list of associations in appendix A) and ask if they can suggest a thesaurus of terms in their field. Basically, whatever subject headings you decide to use, stay consistent. Consistency is the key to any effective cataloging system.

Assigning a call number can be intimidating as well. Be sure to look at the discussion of alternative numbering systems in the previous chapter. The advantages of choosing one of the more widely used classification systems such as LC or DDC is that it is often possible to receive items already identified and tagged with their call number.

Many vendors offer this option. It does cost a bit more, but it may be worth it to you. “I am willing to pay for the convenience of not having to do it myself” (Kim Abbey, Sony Corp. Librarian, personal communication, January 7, 1999). Many vendors offer complete catalog cards for items purchased through them. Some vendors even offer catalog records containing subject headings, call numbers and the bibliographic citation in a computer format. This record can be downloaded into your system if you purchased a software system with that capability. This is called “out-sourcing” your cataloging. Decide for yourself whether out-sourcing your cataloging or doing it yourself is more effective for your library. I believe that someone outside your institution can not know your library needs as well as you. You know best how your users will choose to access the information they need: whether they will search using the title, author, subject heading, or even call number.

Keep in mind that looking at how other libraries have cataloged an item is not cheating! Not only is it acceptable, it is a common practice referred to as “copy cataloging.” The advent of the Internet allows even the most isolated library access to other libraries’ catalogs. Look to see how others have done it. (More on electronic access to other resources will be covered in chapter 11.) Another place to look for help is in the item itself. On the reverse side of the title page many texts have included LC and DDC catalog information. This is called “cataloging in publication” (CIP). The publisher sends the manuscript to the Library of Congress to be cataloged before the final printing occurs. This allows the publisher to print cataloging information in the text itself. It often includes subject headings as well as LC and DDC call numbers.

Within some libraries it may not be necessary to catalog everything. Yes, I have just uttered the unthinkable to many librarians. But if your library has a small collection of donated popular paperbacks that are for entertainment reading only, why should you spend time cataloging items that are by their very nature transitory?

When you have decided on a system for your classification and your cataloging, it is important that you include it in your collection development policy. If you are going to forego cataloging a portion of the collection, such as paperback fiction, note that as well. This will ensure consistency if more than one person will be cataloging and processing materials.

This brief chapter is not intended to teach you how to catalog. Rather, this was intended to cover what cataloging does for those who do not have a background or experience in this area of library science. There are quite a few texts that do a nice job of explaining the actual process of cataloging materials. I encourage you to make use of this “Further Readings” list as well as look into a class in cataloging as suggested earlier.

Further Readings

The ABCs of Cataloging by Suzanne Pilsk (Special Libraries Association, 1997).

Subject Indexing: An Introductory Guide by Trudi Bellardo (Special Libraries Association, 1991).

Sears List of Subject Headings, 2nd ed., edited by Martha Mooney (H.W. Wilson, 1991).

Anglo-American Cataloging Rules, 2nd ed., edited by Michael Gorman and Paul Winkler (American Library Association, 1988).

Small Library Cataloging, 2nd ed., by Herbert Hoffman (Scarecrow, 1986).

Dewey Decimal Classification and Relative Index, 21st ed., by Melville Dewey (Forest Press, 1996).

Library of Congress Subject Headings, 20th ed., by U.S. Library of Congress. Subject Cataloging Division (Library of Congress, 1997).

Classification: Classes A-Z by U.S. Library of Congress. Subject cataloging Division (Library of Congress, 1995).

Cataloging Special Materials: Critiques and Innovations edited by Sanford Berman (Oryx Press, 1986).

Section V Getting It to the People

Chapter 10. Serving Your Users

This chapter will explore the services, beyond access to books on your shelves, that may be offered to users. These will include document delivery, journal routing, interlibrary loan, and other electronic services.

Key Terms To Look For:

- **Document Delivery** — Ordering the full-text of an item for a patron from an outside source, usually at a cost to the library.
 - **Electronic Table of Contents Routing** — This is the delivery of a journal's table of contents to a user via their email.
 - **Journal Routing** — The organized circulation of a periodical to those within an organization who have requested a specific title.
 - **Competitive Intelligence** — Information about the industry and specific companies with whom your organization competes. This information may include financial information and other data to assist your user to better understand the market and its players.
 - **Interlibrary Loan** — The lending of library materials between lending institutions. Libraries with agreements will allow users of the other library access to their collection, often with limitations.
-

A library is more than a collection of books on a shelf. Initially, we looked at what your community's needs were. It's time to look again at those needs. Beyond journals and books, what other services could the library provide that would assist the users in meeting their information needs? If you haven't been having fun through the whole process, now is when it can really be a blast! Now you get to be proactive. Seek out new worlds and boldly go where no one has gone before. You get the idea.

When you begin looking at what services you will provide, remember that you can always add new services later. Keep in mind that overextending yourself now can give your library a bad reputation for not following through with promises. So whenever

possible, start with a trial service period to see if it is workable in your situation. A good place to start is to centralize journal ordering and routing through the library. Once this is centralized, any unnecessary duplication of subscriptions should become obvious.

Saving the company some time and money is a great way to enhance your reputation.

Consider the level of service you want to provide. Will you make copies of articles, or do you expect people to come in to the library and do that themselves? Will you walk requested information to someone's desk, or should they come and get it? These are things to consider carefully, because once you start you will be expected to continue with that level of service. These services should be listed in your collection development policy. Having it written down will assist you if you have to explain to a user why they must copy their own article. I walk things to people if they need them, but I ask first "Can I interoffice this to you?" If they respond that they really need it right now, I will take it to them. This kind of service enhances your reputation. Also, I always walk requested information to the desks of the "powers that be." This may sound like favoritism, but it is important to realize who approves your budget. That is the reality of working in the corporate arena.

Let's look at some services that you may want to consider offering:

- Document Delivery — This means that you will seek out a requested article until you are able to deliver a copy of it directly to the requestor. If that means purchasing it from an outside source, it will be done. (See the debate on charging back in chapter 6.)

- **Electronic Routing of Journal Table of Contents** — Many vendors offer routing of selected journals' table of contents via e-mail. One of the best known is Carl Uncover. Your users select the journals they would like to receive from a list of available titles. Then whenever a new issue is published they are sent the table of contents for that issue. This can greatly reduce the number of hardcopy journals you route. People who just want to browse to see if any articles are applicable to their area of interest will no longer delay those people who are further down on the routing list. Users can then contact you for copies of the articles or order them directly from Carl Uncover (Kim Abbey, Sony Corp Librarian, personal communication, January 7, 1999). Of course, ask them to check with the library first so they don't pay for an article that is sitting on your shelf. Possibly require that all document delivery requests be handled by the library; this will ensure you are not paying for items you already own.
- **Current Awareness Bulletins** — If your institution has a very specific industry, consider publishing a daily/weekly/monthly bulletin delivered via your company's e-mail system. You would have to keep very current on all the news pertinent to your subject area and produce an information bulletin on what's happening in the field. Here is a service that should be considered realistically before offering it. If you are a solo librarian, producing a daily bulletin may be more than you can handle, but maybe a weekly bulletin would suffice.

- **Competitive Intelligence Searches** — If you have the experience, you can offer to research your company's competitors. If the company is U.S. owned and publicly traded it is relatively easy to find financial and corporate structure information. Your company may already have a competitive intelligence officer. If so, go find out what information you need to have in the library to assist them. There are some key sources for financial information, such as *Standard and Poor's* (McGraw-Hill, 1999) and other industry-specific publications. With the advent of the Internet, it is as easy as a few clicks to check and chart a company's stock. Any sharp movement suggests further investigation.
- **CD-ROM and Online Databases** — In most given subject areas there are recognized information authorities. For example every medical library has a copy of the *PDR*, or *Physician's Desk Reference* (Medical Economics Co., 1999). If there is a source that everyone will use, look into providing a network copy so that everyone will have access to it at his or her desk. Full-text databases can greatly increase the functionality of your library with little infringement on floor space. Other electronic sources will be discussed in chapter 11.
- **Acquisitions of journals and text titles** — In many corporate libraries, the librarian serves as the main source of materials such as books and journals for company employees. Many facilities will acquire materials at the request of

users to either be added to the collection, or for the specific use of the requestor.

- **Interlibrary Loan Agreements** — Locate other library collections in your area that effectively augment your collection. Look into loan agreements with them. There may even be a consortium of libraries in your subject area. This will be dealt with more in chapter 11.

Reference assistance should be one of the most important services you provide in your library. As the librarian you will serve as an expert access point to any information that your user is not able to locate on their own. This may seem like an obvious service, but it is so important that it needs to be emphasized. In answering reference questions you may have to do detailed online research or contact other sites. Basically, you do whatever you have to do to get the needed information to your user. Remember that you are an expert in accessing information. In all likelihood, you have more database searching experience than most others in your company do. Make use of that expertise and know that you as an individual and your knowledge are a valuable service.

Beyond the standard services, consider adding a few value-added services. These are services that may not directly contribute to the bottom-line of the company, but instead meet the "extra" needs of your users. An example of just such a service is a paper back fiction collection. I have a "Popular Reading" collection located on a rotating shelf or "rounder" by the door. Company employees bring in books they're done with and take a new one. People in the company I work for spend quite a bit of time traveling to other sites. One of the ways the library serves them is to give them something to read on the

plane. This was not in my budget, so I cleaned out my shelves at home. Then someone else did the same, and before I knew it I had a new (and very well used) collection.

People who might not usually come in will come and grab a paperback. Many stay to check out what other resources we have. With such a collection, I would recommend just shelving alphabetically by author, you may even consider not bothering to put them in order (I know, tough for a librarian to do). For tracking usage statistics a simple system of hash-marks may be the way to go. It takes little time and does not skew your other collection usage statistics.

A paperback collection is an example of a "value-added" service that can make a big difference to your user. By fulfilling a need that goes beyond what the expected role of the library is, you will increase your visibility within the company and thus further guarantee the success of the library.

Hopefully these suggestions can get you started on ideas of how to expand what your library has to offer. The next chapter will explore options for extending your library beyond its own walls with electronic and outside library services. Remember, a key way to continue to meet your users' needs is to be open to their suggestions. The services you offer are what make the difference between a room full of books and a library. I believe there is a direct correlation between the library's level of service and a library's usage. Consider that before discarding any idea.

Further Readings

“Integrated Bibliographic Information Systems: Concept and Application for Resource Sharing in Special Libraries,” by G. A. Cotter, R.W. Hartt, and D. J. O’Connor; in Information Reports and Bibliographies, vol. 17 (no. 5 1988), p. 12-20.

“Electronic document delivery Using the Internet,” by V. M. Bennett and E. M. Palmer, in The Bulletin of the Medical Library Association, vol. 82 (April 1994), p. 163-67.

“Document Delivery in the Electronic Age: Collecting and Service Implications” by Anthony Ferguson, in Journal of Library Administration, vol. 22 (March-April 1996), p. 85-99.

“Document Delivery for the 90’s and Beyond” by Joseph Fitzsimmons, in Journal of Library Administration, vol. 22 (March-April 1996), p. 111-124.

“Virtual Library: A Corporate Imperative” by E. Prime, in Information Technology and Libraries, vol. 12 (June 1993), p. 248-50.

Chapter 11. Connecting to the Outside World & Electronic Sources

This chapter will discuss expanding the resources of your library by use of inter-library agreements as well as online and Internet technologies. The issues of electronic licenses will be discussed as well as the difference between concurrent users and a seat license. Some services discussed in the last chapter will be re-visited here.

Key Terms To Look For:

- **World Wide Web** — A branch of the Internet consisting of web pages set up by others to share/sell information.
 - **Electronic Journals** — Periodicals that are disseminated using the Internet or through a direct modem link.
 - **Intranet** — Private network of computers that uses applications and technologies previously only available on the Internet. This network is only accessible by authorization, removing some of the risk of open access to the internet.
 - **Bookmarks** — Web browsers allow you to “mark” a page and save its address allowing for ease of re-access.
 - **Electronic Licenses** — An agreement between a vendor and the library regarding the use of and access to their product. This usually covers how many users may access the data as well as what, if anything may be reproduced.
 - **Concurrent Users** — The number of users who may access a product at the same time.
 - **Firewall** — A security system in a computer network that allows only authorized users to access the system. Some firewalls even keep internal users from accessing anything outside the barrier.
 - **Seats** — The number of actual machines a software product may be loaded onto.
 - **Push Technology** — Technology that allows the library to “push” the information to the user rather than waiting for the user to come into the library.
-

To successfully meet the information needs of your library users, it will be necessary to go beyond the walls of your library. Additionally, there are some cost and space effective methods for greatly increasing the library's services by utilizing the new technologies and fostering agreements with other information facilities. This chapter will discuss some automated options to better serve your clientele.

In order to proceed with this discussion, I am going to assume that your library uses computers. At the risk of alienating a few of you, I strongly feel that a library cannot effectively meet the information needs in the corporate environment without being automated. Ideally you should have access to electronic sources both on your own network and outside on the Internet. You will want to discuss your company's firewall with the computer department. The firewall is what keeps your internal information safe from outsiders and may restrict your access to external information. If your company feels very strongly about the security issues of networked computer terminals having Internet access, the solution may be to have two terminals, one with network access and the second with external Internet access. You would use these with the understanding that "never the twain shall meet." Anytime that a network and the outside Internet are accessible though one computer there is the possibility that someone unauthorized could gain access to the internal data. This is commonly known as "hacking." Your computer department can best discuss with you their concerns and methods for prevention of this.

Let's look at some core electronic sources that you may want to add to your list of services:

- Electronic Routing of Journal Table of Contents (TOC) — As briefly discussed before, this service utilizes the company's existing e-mail system to deliver the table of contents for the current issue of the titles that have been requested by each individual. TOC can also be done over the company's intranet allowing individuals to view the table of contents for any journal to which the library subscribes. The point of this service is to lower the need to route the paper copy

which inevitably gets left on someone's desk who's on vacation thus slowing delivery to everyone else. This service also has the advantage of being "desktop accessible." This is what is called "push technology." Instead of waiting for users to come to you, you push the information to them. An example of this would be if you set up a system to search for certain companies' stock value on a daily basis and delivered it to, say, all the staff in marketing. This valuable information would be delivered to them before they even had to ask. These are the terms-of-the-day in many corporate environments. Companies don't want to pay staff for the time it takes to walk to the library. Instead, staff can be more productive by accessing information from where they sit.

- **CD-ROM / Online Databases** — Many reference sources are now available as CD-ROM, online products, or even web-based products. Whatever your subject area, whatever your key resource is, it is likely available in the electronic format. These sources, like the *PDR* (Medical Economics Co., 1999) or *Standard & Poor's* (McGraw-Hill, 1999), are enhanced in the electronic format for many reasons. First, no longer do you have to worry about someone walking out of your library with your main resource. Second, you can usually purchase a network license for the source which allows for desktop access (the buzz word yet again). Third, the resource can now be accessed by more than one person at a time, provided that you purchase a multiuser license. Beyond subject specific databases, there are several large databases that allow you access to many smaller databases through their system. Some examples of these are DIALOG, LEXIS-

NEXIS, and ABI/INFORM just to name a few. Access to these larger systems allows the library to serve a wider variety of information needs, rather than be limited to a very specific subject area. See chapter 7 for a discussion of database vendors and free trials.

- **Full-Text Electronic Journals** — Many vendors offer full-text online subscriptions to periodicals. If you are very limited on space this may be the way to go. Depending on your license agreement, your users may access these journals at their desks. Many vendors also allow you access to back issues electronically. This may be an ideal way to solve the space issue while still providing coverage for that “one” reference question. Be sure to ask about their retention of back issues, as well as their definition of “full-text.” It should be noted that the term “full-text” is not always as it seems. Often electronic journals do not include letters to the editor or advertisements. If you are in the medical or competitive intelligence area, you need this information. Sometimes full-text does not include images. This could be a crisis if all the information you wanted was contained in a graph that was not included. In some cases the paper copy is free or very low cost with the paid electronic subscription. Obtaining both electronic and print versions would allow you to access images when necessary.

A note here about licensing of electronic media. TAKE IT SERIOUSLY! If you purchase a five-seat license, do not install it on more than five terminals. If you find that more people want it, purchase a larger license. Many people have the attitude of “How will they know?” Some software can track how many times it has

been loaded. And violation of a licensing agreement can cost the company an incredible amount of money, not to mention your job.

In order to better understand the language of licenses, there are some terms that should be defined. The basic point of a license is to outline the rules regarding the use of a specific electronic product. This usually covers how many people have access to it, how many machines it will be loaded on, and whether or not parts of the product may be copied, reprinted, or otherwise duplicated. These and maybe other factors will determine how much your library will be charged for the use of the product. Some licenses are annual, some are longer. Check carefully the duration of the license.

A concurrent-user license covers how many people will be connected to the product at the same time. For example, if you load a new database onto your company's network and have agreed to a five concurrent-user license, then only five people will be able to connect at the same time. When the sixth person tries to connect they will most likely get a message stating that the user license has been exceeded and they should contact their system administrator or try to connect later. I always ask that users let me know when they have been denied access. I want to know if the system is always full. If so, I may want to purchase a larger license.

A multi-seat license gives the license holder permission to load the product onto a specific number of computers. It does not matter whether those seats are actually being used or not. If you hold a five-seat license, even if only one person at those designated terminals is using the product at that moment, loading it onto a sixth terminal would be a violation of your license.

Whatever type of license you select, you should discuss with the vendor the specifics of the agreement. You should know that wording is negotiable. Clauses can be removed or altered to meet your specific needs. If your library serves users that are off-site, be sure to ask how that affects your agreement. I highly encourage you to read the article listed in the “Further Readings” by E. A. Warro. It discusses in depth the issue of licensing agreements in libraries (Warro, 1994).

In some corporations the computer department— be they called Management Information Systems (MIS), Computer Information Systems (CIS), Information Systems (IS), or any other name— is in charge of negotiating all licensing agreements. If that is the case, be sure that the department clearly understands your needs before agreeing to anything. If you will be negotiating your own agreements I still encourage you to discuss the process with someone who has experience.

Licensing leads us into the area of copyright. Copyright law can be a very complicated issue. In the academic and public library arena, single copies are often covered under the “fair use” clause of the copyright law because of the assumption that the item will be used for educational purposes. This is often not the case in the corporate arena. I will simply state here that if your library exists in an institution that is “for profit,” you may have some very serious issues to look at, as you will not be covered under the educational use clause of “fair use”. I suggest that you find out if anyone in your legal department specializes in copyright law and can advise you on possible violations as well as the current case-law. You may find that you have a wonderful resource right under your roof. It would be wise to contact the Copyright Clearance

Center (CCC). The CCC can brief you on copyright laws, “fair use,” and assist in establishing a company policy of copyright compliance. The contact information for the Copyright Clearance Center is listed in appendix A.

Beyond licensing agreements, purchasing new material in the electronic format is expensive. Before laying out the cash, I strongly suggest that you ask for a trial period. Many companies will offer a free one-month trial of CDs or online memberships. This will allow you to evaluate whether the new electronic item fits within your criteria for selection and purchase. I have included a list of sample criteria to assist you in creating your own criteria for selection of electronic formats. (See figure 11.1). Your criteria should be outlined in your collection development policy. If your policy doesn't cover electronic sources, it's time to add another section.

Electronic Resource Selection Checklist

Figure 11.1

Is this source unique or does it duplicate an existing resource?
If it's close to a duplicate, is it less expensive, easier to use, or beneficial in some other way?

How does this database fit in with the corporate mission?

Who will benefit from this database? Everyone?- Just the president?

Does this resource fit within your existing budget?

Does another resource have to be eliminated to bring on this resource?

Will this resource improve service to our clients/customers? How?

In what format will we purchase the database?

	<p>How will it be integrated with other resources?</p> <p>What changes have to be made to our hardware/software to accommodate this database?</p> <p>How will we provide access to this database?</p> <p>Who, in what departments and at which levels will have access to this resource?</p> <p>Will end-user training be provided?</p> <p>Will additional staff be required?</p> <p>What other departments should be involved in this decision?</p> <p>How much time and effort is involved in providing access to this resource?</p>
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(Schulman, 1997, p. 50)

The internet is also a place of potential library expansion. But there is a lot of hype out there, too. The Almighty Internet? — So everything is free and full-text on the Internet, right? Well, no. But that doesn't mean that there isn't valuable information to be had. First, it is important for you to understand some basic rules about the Internet. The World Wide Web can be a scary place without some guidance. There are many search engines to help you find what you are looking for, but they often find just exactly what you don't want as well. Within a web address there are clues to help determine its content before you even get there. Addresses look something like: <http://www.fda.gov>. The last three letters are a good place to start. They refer to what is called the domain. This tells you who is supporting the page that you will be accessing. Here are some of the domains and who supports them:

edu	Educational system such as a university
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org	Organization such as associations or other member groups
com	Commercial systems
net	Networks— (a vague one)
gov	Government site
mil	Military system— (most service personnel's e-mail addresses are on a mil domain)

Also, sites may have an additional two letter code to tell their country of origin.

us	United States (often not added)
uk	United Kingdom
jp	Japan
de	Germany
[etc.]	

(Thomsen, 1996, p. 16)

Keeping these straight can avoid embarrassing situations. I know of one person who was presenting a seminar on government information on the web. He was projecting his screen onto an overhead. He went to load the White House site and instead of going to www.whitehouse.gov went to www.whitehouse.com. To his utter embarrassment a rather risqué photo began to load. Luckily most people in the room were of good humor and realized it was an honest mistake.

This brings me to the point of “bookmarks.” In order to access the Internet you will use a browser. This acts as an interface between your computer and the computers that host the websites you will be accessing. Whatever browser you use— Netscape, Internet Explorer, etc— you are able to save addresses of sites you will want to access again. It is as simple as clicking on “Bookmarks” and clicking on “Add Bookmark.”

That does it. You can access your bookmarks by clicking on “Bookmark” and selecting the one you want. Setting up bookmarks on the library terminal will assist patrons in accessing often-used sites without having to search for them.

Some suggestions for bookmarks would be homepages of any government agencies that affect your company, such as the FDA or Customs Department. Also bookmark the online catalogs of other libraries in your area. That makes it very easy to check for a resource elsewhere. Maybe you want to mark your competitors' sites. You can often access their annual report directly from their homepage. Consider marking a stock quote page with your own company's stock. Many people will want to know how their stock is doing. Also mark any associations that cover your subject area such as the American Management Association, the American Medical Association, and, of course, the Special Libraries Association (see Appendix A for their web address).

When searching for information that you don't already have bookmarked on the Internet, you will most likely have to use a search engine. A search engine is a site that allows the user to enter a query and the system will go out into the Internet and retrieve a list of sites matching the criteria entered. There are an ever-growing number of search engines you can use to find the information you are seeking. For a list of search engines, see figure 11.2.

Internet Search Engines

Figure 11.2

Alta Vista — <http://altavista.com>

This engine allows users to tailor their search strategies by using Boolean, proximity searches, and language limitations. While a bit complicated, it is an effective search engine once learned.

Excite — <http://www.excite.com>

This engine allows fast access to a small number of relevant sites and will allow the searcher to locate more sites similar to one already retrieved.

HotBot — <http://www.hotbot.com>

This search engine allows the use of Boolean operators as well as other search choices. The system will allow the viewing of up to 100 results at a time. Users may also limit results to those updated within the last two weeks. This helps ensure that the sites are current.

Northern Lights — <http://www.northernlight.com>

Beyond searching like many of the other engines, Northern Lights holds contracts with more than 5000 publications. This allows the searcher to download, or print the full-text of a document or article for a fee. The fee ranges from \$1.00 to \$4.00 and can be paid using a credit card.

DejaNews — <http://www.dejanews.com>**Reference.com** — <http://www.reference.com>

Both of these search engines allow the user to search newsgroups or lists. This can be used as a competitive intelligence service to locate trends and information often before it goes public. It allows the searcher to locate comments about a specific company, product, or industry.

Profusion — <http://www.profusion.com>

This is considered a "metasearch engine" which means that it will search more than one engine at a time. The system searches whatever engines you specify and then removes the duplicate responses allowing the searcher to cover more ground in short time. However, search engines operate differently, not all allow Boolean

searching, so sometimes metasearch engines are not as effective on in-depth searches as individual search engines.

(Kassel, 1999, p. 28)

I would suggest establishing a clear Internet usage policy before providing access to staff. This policy should outline which searches you will assist with. For example, “The librarian may only assist in Internet searches pertaining to Quintiles business.” This will give you an easy out should you be asked to find “Beanie-Babies.” Your company may already have a policy regarding what it considers “inappropriate sites.” Ask for it. If one doesn’t exist, suggest that one be established.

This is by no means a comprehensive list of electronic resources that can be used in your library, but it is a start. Now we need to look at other resources beyond the wall of your facility, namely other information facilities. Not duplicating other existing collections saves time and money. Find out what other resources there are in your area, including libraries or other companies (probably not competitors, as you may have company-sensitive materials in your collection and they in theirs). If your collections are complementary, discuss the idea of an interlibrary loan agreement. Maybe your collection is heavy in law but light in business, while theirs is the opposite. For the rare reference questions, consider allowing each other access to your collections. As long as your policy is clearly outlined with procedures in place to protect each collection, this can be a very effective way to expand your resources without expanding your space or budget.

Seek out consortiums in your area. These are groups of libraries that agree to pool their resources. One such organization is the National Library of Medicine (NLM). Membership in this consortium allows members borrowing privileges as well as agreement to fill document delivery requests of other members. These requests are paid for via coupons traded among members, thus keeping actual dollar output to a minimum. Whatever your specific subject area, there are bound to be groups you can look join. Start by contacting a library association. There is a list of them in an appendix at the conclusion of this handbook.

Clearly, with a bit of ingenuity and knowledge, it is possible to expand your library services well beyond what is contained within the walls of your facility. By making use of new technologies as well as local resources it is possible to extend your information offerings without greatly expanding your floor space or your budget.

Further Readings

Internet for Dummies, 5th ed. by John Levine, Carol Baroudi, and Margaret Levine Young (IDG Books Worldwide, 1998).

Reference and Collection Development on the Internet by Elizabeth Thomsen (Neal-Schuman Publishers, 1996).

Making the Most of New Technologies by Kathleen R. T. Imhoff (Neal-Schuman Publishers, 1996).

"Electronic Journals: A Formidable Challenge for Libraries" by M. L. Sasse, and B. J. Winkler, in Advances in Librarianship vol. 17, (1993), p. 149.

"What Have You Been Signing? A Look at Database Licensing Agreements" by E. A. Warro, in Library Administration & Management vol. 8, p. 173.

"Internet Power Searching: Finding Pearls in a Zillion Grains of Sand" by Amelia Kassel, in Information Outlook vol. 3, (1999), p. 28.

Chapter 12. Marketing Your Library

This chapter will discuss strategies for marketing your library within your company. Ideas suggested include an open house, brochure design, and use of the company newsletter.

Key Terms To Look For:

- **Marketing** — The act of informing your users and potential users about your library and its services.
 - **Value-Added Service** — A service that the library provides beyond that which is required. It is providing a service the users may not have even known they needed.
-

Why is marketing the library so crucial? Well, there are two ways to look at it. The first is a bit more idealistic. The point of having a library is to provide a service to its users. The only way to draw users is to let people know what the library can do for them. The second reason is a bit more practical. In the corporate environment departments often have to justify their existence. If you can show that you answer 30 reference questions a day and have saved the company \$500 by centralizing subscriptions and eliminating duplication, well, then you've earned a pretty good justification. Either way you look at it, to have a successful library you have to get people to use it! Marketing your library is how you do that.

The special library must begin its marketing effort by informing all potential users of its existence, its location, its telephone number(s), and an overview of the many services offered that will save both time and money. (Leerburger, 1982, p. 105)

There are a few key items to keep in mind before you begin marketing your library. First and foremost, know that you provide a valuable service. Why will others value you, if you don't consider your services important? Second, know how your company makes its money. Knowing about the larger organization's bottom line ensures that you know how you contribute to that. Your contribution to that bottom line is your justification for continued management support. That may sound a bit cynical, but if budgets get tight, the library is often seen as a "risk free" place to cut. Third, make sure you are providing a service that users will "buy." Even if you're not charging back (see chapter 6 on funding), your services must be of value to your users. If no one needs what you are offering, your library won't last long. This is why it is important to understand your users' needs. Re-running a user survey is one way to do that. See chapter 2 for a discussion of user surveys. The whole point of a corporate library is to provide solutions to problems, not just to provide information for information's sake (Berner & St Clair, 1990).

In your campaign to market your library, you will need handouts and informational brochures. In designing your own brochures, there are several basic software programs that can help. Even your most basic word processor will allow you to split your document into columns. Using a standard printer and three columns, a basic document can become a tri-fold brochure. Browse through the images and headers in your program. A small graphic can make a big difference. Be sure to list your hours, contact information and your core services. List the names of the electronic sources available to users through the library.

Check with your company's marketing department. They may be able to help you "spiff-up" your brochures. In some cases the expense of printing them may be covered under their budget! Either way, these are good people to know. They are probably the ones who have the CD clipart with all the great graphics that can really make your material look more professional. At the very least they should be able to provide you with contact information for a few special paper vendors. Even the simplest of brochures can be greatly improved by using quality paper, maybe even with preprinted graphics. For example, in my library I use a paper that has images of leather-bound texts running along the bottom, with a light background image of Rodin's "The Thinker" on it. Using a high quality laser printer I am able to create my own brochures that look very professional (see appendix F for a sample brochure).

The most natural kick-off to your marketing campaign is to hold a "Grand Opening/Open House" for your new facility. Once you have your collection cataloged and your shelves organized, it is time to work on a few of the cosmetics. Get some framed pictures on the wall. Here is another good time to have a friendly chat with your office manager. I bet she/he has some items to spare. I once came across a set of three framed paintings that were just gathering dust in a storage room. They now look quite nice on my library's south wall.

A trip to your local home center can be of great benefit. Two or three small plants make a big difference and cost only a few dollars. Philodendrons are good choices, as they do well in florescent light, need little attention other than water, but will fill out nicely to add a bit of color to what may be a stark room. Obviously some care must be

taken when placing the plants. Over-watering and computer monitors do not mix. Plant run-off can quickly damage texts.

While most likely you are not expecting folks to come and read on their lunch hour, creating a nice comfortable reading nook is a great way to get visitors to linger. An uninviting room makes for an uninviting library, which is not a good start to attracting people to use it.

Pick a day well in advance and plan to have a “Grand Opening.” To advertise the event, you may use the internal e-mail system. If you do, find out what approval you need to send a blanket e-mail to all users. This may be your first contact with your potential users, so make the announcement appealing! Keep it brief and add some color if your system allows (See figure 12.1). Be sure not to pick a Friday or Monday, as these are the most missed days. Also, don’t schedule too close to lunchtime, as many people go offsite. An afternoon Grand Opening gets people fresh after lunch and means they’re ready for dessert.

Figure 12.1

Aside from e-mail you can put flyers up in break rooms. If your company has bulletin boards, use them! By folding a paper in half and reinforcing it, you can create table-top signs to be set in a cafeteria or lunchroom. Most companies' phone systems allow for announcements to be broadcast throughout the office. If so, get authorization to make a "reminder" announcement on the day of your event. Make flyers telling of new services or new acquisitions. This type of advertising can be used to spread the word about the library long after the Open House. Flyers like these can also be used later to tout a new service or just remind staff of what the library can do for them.

At the Open House have plenty of your service brochures available so that everyone can take one with them. Have a list of your journal holdings that people can take. You may want to have additional "goodies" such as bookmarks, or small charts of the "Top Ten Shortcuts in Microsoft Word (or whatever word processor is company standard)." These are things that people will use everyday, thus being reminded of the library everyday. Make sure that your handouts all have the name of the library clearly displayed. The day after your opening, post a message thanking everyone that came. Also include a note inviting those who could not make it to drop by anytime to have a personal tour.

Marketing must be an ongoing project. It must be your goal to continually make staff aware of the library's existence so that it will be completely natural for them to seek out the library as a solution for their information needs. There are many ways of doing this. Here are just a few suggestions:

- If your company has a newsletter, continually run advertisements in it. Once a month or bi-monthly include a press release about new services or additions to the collection. Consider writing a quarterly column to keep users up to date with library happenings. Be sure to share your accomplishments. If your library just provided information that saved the company's contract with a client, toot your own horn!
- Visit departmental meetings. Ask to present a brief presentation on what the library can do for the staff of that department. To that end- keep a "kudos" file. I keep a file of all the "Oh, thank you.. you saved the day..." letters. If your library is mentioned in a bulletin or company newsletter be sure to save a copy. You just never know when you will be asked to show evidence of how your service has helped the company.
- Prepare a handout or folder to be included in the new employee orientation. If your company lumps their orientations into once a month, or weekly mass-orientations ask to speak briefly at it. Introduce yourself and the library. Hand out your brochure as well as a list of databases available to users.
- Create bookmarks, or computer shortcut templates that staff can use to make their jobs a bit easier. Maybe have your library name and contact information printed on sticky-notes. Those are always popular in my office.

The main point of marketing your library is to make people aware of what the library can do for them. Waiting for users to come to you may not be the best way to do that. A traditional library serves the user who comes to the library. “We’ve got ourselves all set up to manage our libraries in such a way that we’re there for the questions, when they come to us. What would happen if we actively went after our users, took steps to induce them to come to the library for the information and materials they need” (Berner & St Clair, 1990, p. 67)? Indeed, what would happen if we took the information straight to them? That would be the ultimate in marketing the library.

Further Readings

Marketing Your Library by Benedict A. Leerburger, (Knowledge Industry Publications, Inc., 1982).

Creating Newsletters Brochures and Pamphlets by Barbara Radke Blake and Barbara L. Stein, (Neal-Schuman Publishers, 1992).

Library Promotion Handbook by Marian S. Edsall, (Oryx Press, 1980).

Library Public Relations, Promotions, and Communications by Lisa A. Wolfe, (Neal-Schuman Publishers, 1997).

Chapter 13. Ongoing Library Management

This chapter will cover moving out of the set-up phase and into the routine management of a corporate library facility. Tasks such as shelf reading, statistics, and expanding services will be discussed. In addition, this chapter contains a general discussion of core resources for the librarian.

Key Terms To Look For:

- **Statistics** — The records of library usage including number of reference questions, items checked out, and number of patrons who visited to name just a few.
 - **Shelf- Reading** — The act of checking each shelf to assure that items are in their correct location.
-

We're nearing the end of our journey. A new library facility is up and running. But you aren't done. Now that the library exists, it's going to need ongoing management. This final chapter will help outline what is required in the daily running of a corporate information facility. These are the tasks that you need to fit in somewhere between the incoming requests and reference questions. You will have to determine for yourself how to strike a balance between serving your users and maintaining the administrative side of the library. If you have more than one staff person in the library, this may not be difficult, but if you are a solo librarian it can be challenging to strike a balance.

In order for the library to continue to meet its goal of serving its users there are some key tasks that must be addressed. All of these functions should be thought of as ongoing processes. You will never be done compiling statistics, or shelf-reading, only caught up for the moment. So here are the main points of ongoing library management duties:

- Be on the lookout for new resources and references. Updating your collection is the only way to ensure that you can keep meeting the ever-changing needs of your users.
- Statistics, statistics, statistics—Track library usage and cost savings data. Keep a “kudos” file. When someone sends you a “What would we have done without the library” letter, keep it. Accurate statistics will allow you to see areas of heavy usage that may need expansion as well as underused areas that can be cut back. Having the numbers to back up a request will get you a lot further than just a “we need it” statement. Examples of basic statistics (sometimes referred to as “metrics” in the corporate setting) are:

Circulation statistics—The number of items that were checked out or used in the reference section. Also the number of times a specific item has gone out.

Reference statistics—Track the number of questions you answer a day. Also track how much time you spend on each question.

Document delivery statistics—Carefully track the articles that you order through document delivery. If you can show whomever approves your budget that you had to order document delivery from one journal title 17 times last year at a cost of \$20 per article, it may clearly be cost beneficial to purchase a subscription. Also track who orders the documents. If your library does not charge back (see chapter 6 for a discussion) you may find that one department is consuming a large portion of your budget through document delivery costs.

You will have to evaluate at what point the cost will have to be covered by that department or, at the very least, you can show the company why the document delivery fees are so high.

Statistics may sound dreary, but they can be a great help with justification in next year's budget. Most automated library catalogs will do most of the circulation statistics for you. Use of a basic spreadsheet, such as *Excel* can make tracking the rest of the statistics relatively painless.

- Routinely ask users to comment on whether the library services are effectively meeting their needs. This may mean more surveys, or establishing focus groups for more in depth, one-on-one comments.
- Maintain your shelves. Depending on the size of your collection, select a time frame to do periodic shelf-reading. Shelf-reading is the process of looking over each item on the shelf to ensure that it is in the correct location. A misplaced item may not be found by a user, thus rendering it useless. Some libraries do this on an annual basis. I much prefer to tackle smaller increments on a monthly basis, because after you have read 12 ranges of shelves you begin to miss the very errors that make the process necessary.
- Seek out new and innovative services that can more effectively fulfill your users' information needs. Elicit suggestions from users. Encourage open lines of communication so that users will feel comfortable making recommendations.

- Stay current in your subject area! It is crucial that you continue reading the sources that are at the forefront of your company's business. Current knowledge in your field will save a great deal of embarrassment when someone comes in with a question about the new trend in the industry. If possible, work reading time into your weekly schedule.
- Join professional organizations. Obviously a library association is a good place to start, but also look into associations in your company's industry. A strong network of people can be even more useful than a strong computer network.

I strongly encourage you to look at some of the "Further Readings" suggestions. Beyond building the collection that will serve your users, may I also suggest that you consider building a librarian's reference collection. These are items that your average user will never ask for, but they may help you serve your user better. These items include basic dictionaries and thesauri as well as some of the subject headings lists discussed in chapter 9. Appendix C contains a list of resources for your "Librarian's Tool Kit" collection.

In addition to sources specific to your subject field, reference items should include texts on the functioning of a library. This is where the Librarian's Yellow Pages I kept mentioning should go. Included in that list are two texts I would like to highlight here. If this handbook has been the first text you've read on the subject of running a special library, I urge you to now pick up these two: Donald J. Sager's Small Libraries:

Organization and Operation (Highsmith, 1992) and Ellis Mount's Special Libraries and Information Centers: An Introductory Text, third edition (Special Libraries Association, 1995). These sources will provide you with a wealth of information that simply could not be covered here.

We've come to the end. The last 13 chapters have discussed the basics of how to get your library up and running. Remember, when all else fails, do what you ask your users to do—ask a librarian! Contact another library and ask to speak with a librarian. I have yet to run across one who isn't more than happy to help out a colleague in the trenches!

Good luck, and I hope you'll have as much fun as I did.

Further Readings

Library and Information Center Management 4th ed. by Robert D. Stueart and Barbara B. Moran, (Libraries Unlimited, 1993).

Developing Library and Information Center Collections 3rd ed. by G. Edward Evans, (Libraries Unlimited, 1995).

The Solo Librarian's Sourcebook by J. A. Siess, (Information Today, Inc., 1997).

Special Libraries and Information Centers: An Introductory Text, 3rd edition by E. Mount, (Special Libraries Association, 1995).

Small Libraries: Organization and Operation by D. J. Sager, (Highsmith, 1992).

APPENDIX A

List of Associations

American Association of Law Librarians
53 W. Jackson Blvd.
Chicago, IL 60604
312-939-4764

American Library Association (ALA)
50 E. Huron
Chicago, IL 60611
800-545-2433
<http://www.ala.org>

American Society for Information Science (ASIS)
8720 Georgia Ave., Suite 501
Silver Spring MD 20910-3602
301-495-0900
<http://www.asis.org>

Association of Libraries & Information Bureaus (ASLIB)
Information House, 20-24 Old St.
London EC1V 9AP, England
071-253-4488

Association of Research Libraries
21 Dupont Circle, Suite 800
Washington DC 20036
202-296-2296
<http://arl.cni.org>

Canadian Library Association
200 Elgin St.
Ottawa ON K2P 1L5
Canada
613-232-9625
<http://www.cla.amlibs.ca>

Church and Synagogue Library Association (CSLA)
Box 19357
Portland OR 97280
503-244-6919

Copyright Clearance Center
222 Rosewood Drive
Danvers MA 01923
978-750-8400
<http://www.copyright.com>

Medical Library Association (MLA)
65 East Wacker Place, Suite 1900
Chicago IL 60602
312-419-9094
<http://www.mlanet.org>

National Librarians Association
P.O. Box 486
Alma MI 48801
517-463-7227

National Library of Medicine (NLM)
8600 Rockfille Pike
Bethesda MD 20894
800-272-4787
<http://www.nlm.nih.gov>

Society for Information Management (SIM)
401 N. Michigan Ave.
Chicago IL 60611-4267
312-644-6610

Special Libraries Association (SLA)
1700 18th St., NW
Washington DC 20009
202-234-4700
<http://www.sla.org>

APPENDIX B

Glossary

Abstract— A brief summary that gives the essential points of a book, pamphlet, or other item.

Abstract Journal or Periodical— A periodical containing abstracts of current materials such as books, or articles.

Abstracting Service— An outside company or vendor that provides abstracts for a particular study area or subject for a fee.

Advisory Committee— A group chosen to represent the larger group of user that allows the library to take a smaller sampling of information.

Call Number—The code given to an item in the library collection during classification that determines its placement on the shelf.

Card Catalog— A catalog in which bibliographic records are on separate cards of uniform size, arranged in a definite order in drawers.

Cataloging— The process of describing an item, such as a book, in a fashion to facilitate location.

CIP Information—“Cataloging in Publication” information printed on the back of the title page of a text. It includes subject headings and the call numbers in DDC and LC as cataloged by the Library of Congress prior to the final run of publication printing.

Circulating Item— An item owned by the library that may be taken from the library for use outside the facility.

Circulation— The activity of a library lending materials to borrowers and keeping records of those loans.

Citation— A note of reference to a work from which a passage is quoted or to some source as authority for a statement or position.

Class— A division of a classification scheme under which are grouped subjects that have common characteristics.

Classification—The process of assigning a number, letter, symbol, or some combination of these to a book or library article so that it may be shelved, filed, or grouped together with similar or related materials

Collection Development Policy— This is a written statement for the individual library that outlines policies and procedures for acquiring materials. It will serve as a framework, as well as justification for decisions.

Community— The environment within which the library exists as well as the body of users it will serve.

Concurrent Users— The number of users specified by the license that may access an electronic product simultaneously.

Dewey Decimal Classification— A system of subject classification for library materials designed by Melvil Dewey using a decimal number system.

Electronic Licenses— A legal agreement between the owner of a product and the library regarding rules governing how many users may access the product. The agreement usually covers how, if at all any portion of the product may be reproduced.

Intranet— Private network of computers that uses applications and technologies previously only available on the internet. This network is only accessible by authorization, removing some of the risk of open access to the internet.

Library— A collection of materials organized and administered for reading, consultation, and study. Also, a room, or group of rooms, or a building in which a collection of materials are organized and administered.

Library Instruction— The teaching of library patrons how to use the library and its materials.

Library of Congress Classification— A subject and author classification system for books designed by the Library of Congress for its collections. It has a notation of letters and numbers to allow for expansion.

Limited Edition— An edition of a text issued with a relatively small number of copies.

Mission Statement— A statement outlining the library's goals and objectives.

Monograph— A systematic and complete treatise on a particular subject, usually detailed in treatment but not extensive in scope.

Monographic Series— A series of monographic works issued in uniform style under a collective title by an academy, an association, a learned society, or an institution.

Open Stacks— Library shelves to which users have direct access for examination of materials.

Out of Print— Materials that are not obtainable through the regular market, since the publisher's stock is exhausted.

Outsourcing— Paying an outside vendor or person to complete a task usually done by library staff, such as cataloging.

Over-sized— A book which, because of its larger format cannot stand on regular library shelves.

Periodical— A publication with a distinctive title intended to appear in successive numbers or parts at stated and regular intervals for an indefinite time. Each part generally contains articles by several contributors.

Periodical Index— An index to a volume, or several volumes which lists the contents of the periodical in a logical order, usually by author, title, and/or subject.

Prospectus— A pamphlet or folder issued by a publisher to announce a work newly published, designed to solicit orders.

Pseudonym— A false name used by an author to conceal their identity.

Publication Date— The year in which an item was published, generally the date given at the bottom of the title page.

Publisher— The person, firm, or corporate body taking responsibility for the issuance of a book or other material.

Range— A row of several sections of double-faced shelving.

Reader's Advisory— The act of library staff recommending books to library users based on the user's interests and abilities.

Reference Book— A book designed by its arrangement and treatment to be consulted for definite items of information rather than read consecutively. Also, a book placed in a collection that is to be used in the library only, as opposed to a circulating book.

Research Library— A reference library with specialized material, where exhaustive investigation may be done.

Review— An evaluation of a literary work, usually published in a periodical or newspaper.

Revised Edition— A new edition of a work whose text has been changed and corrected.

Routing— The systematic circulation of material among clientele in accordance to their interests and fields of specialization.

Routing Slip— A form attached to the material being routed with a listing of whom the material should be sent to.

Seat License— In a licensing agreement, the number of individual terminals or computers a product may be loaded on.

Selection— The process and procedures for choosing items that will be purchased or acquired by the library for inclusion in its collections.

Serial— A publication issued in successive parts at regular intervals, intended to be continued indefinitely. Serials include periodicals, annuals, and proceedings. Also, any literary composition published in consecutive numbers of a periodical.

Serial Number— The number denoting the place of a publication in a series.

Shelf Reading— Checking of shelves to see that books are in the correct order by their call number.

Verso— The left-hand page in an open book, usually bearing an even page number.

Weeding— The removal of items from the library collections based on criteria outlined in the library's collection development policy.

(Young, 1983)

APPENDIX C

Librarians' Tools

The following is an annotated bibliography of resources recommended for a core collection of profession reference tools. These are suggestions beyond the “ideal collection” discussed in chapter 5. They are non-subject specific sources that should assist a librarian in almost any situation. Again, you know your environment better than anyone else, select what applies to you.

Texts

- Special libraries and information centers: An introductory text, 3rd ed., by E. Mount, (Special Libraries Association, 1995).

Recognized as one of the leading authorities on special libraries. This text covers subjects such as management techniques, user services, technical services, networking, and serials management.

- Small libraries: Organization and operation, by D. J. Sager, (Highsmith Press, 1992).

This brief text covers many aspects of running the small library, with emphasis on the one-person-library. Includes a break-down of DDC and LC classification systems.

Tools

- The Librarian's Yellow Pages (Garance, Inc., 1998).

A telephone directory style resource for finding vendors, suppliers, and book-jobbers in the library field.

- Sears List of Subject Headings, 2nd ed., edited by Martha Mooney, (H.W. Wilson, 1991).

A list of subject headings often used with the DDC, but very useful in the smaller special library with broad topic coverage.

- Library of Congress Subject Headings, 20th ed., by U.S. Library of Congress, (Library of Congress, 1997).

The list of subject headings published and utilized by the Library of Congress. A multi-volume set often referred to as the “Red Books.”

- Special Libraries Association Directory, (Special Libraries Association, 1998).

The local chapter of the SLA can provide you with a current directory for your area. This is an excellent source for networking contacts.

Reference Guides

- Ulrich's International Periodicals directory (37th ed.). (1999). Bowker.

An annual publication listing the current titles, prices, and availability of periodicals currently in print. This includes titles available inside and out of the United States.

- Gale Directory of Databases. (Gale, 1998)

This annual directory is over 500 pages long and includes contact information as well as content and subject coverage, and availability of online and CD-ROM databases.

- Webster's New World College Dictionary, 3rd ed., (MacMillan, 1997).

Accepted as an authoritative English dictionary. A staple for any library.

- Random House Webster's Computer and Internet Dictionary, 3rd ed., (Random House, 1999)

A dictionary of computer and technological terminology relating to computer science and the Internet. Covers terms needed by both the layman and the seasoned professional.

- World Almanac and Book of Facts 1999, (Griffin Trade Publications, 1998)

An annual publication listing useful facts such as population, mortality rates, GNP, and capitols on to less routine such as how many pounds of chocolate were consumed in the U.S. last year.

- Statistical Abstracts of the U.S., 1997: The National Data Book, (Diane Publishing, 1997)

A good source for data and statistics on specifically the United States. The data in the text generally runs one to two years behind the publication date due to the time required to compile the data.

Journals

- Library Journal

A well-known journal in the field of library science.

- Computers in Libraries

This journal is devoted to the use of computers and automated technologies in the library setting.

- Information Outlook (formerly, Special Libraries)

The monthly publication of the Special Libraries Association, and covers broad topics of concern the special libraries.

- American Libraries

This journal is devoted to libraries and the field of library science within the United States.

Reviews

- Publishers Weekly

A publication listing titles and reviews of recently released materials.

- Choice

A periodical of reviews written with the librarian in mind.

- Kirkus Reviews

In the same class as Choice, a good source of reviews to be used for selection purposes.

- Forthcoming Books

This periodical is primarily a listing of books soon-to-be-released.

APPENDIX D

Sample User Surveys

The following pages contain examples of user surveys donated to the Special Libraries Association's collection and gathered from fellow librarians.

Library User Survey

Quintiles Pacific, San Diego

Please take the time to answer the following questions to help us improve the quality of service that this library provides to you and all it serves. Your opinion matters! Thank You.

1. Have you ever used the library? Yes No

If no, why not? (Then skip to page 2)

2. When did you last use the library? _____

3. How often do you use the library?

 Daily Weekly Monthly Less Frequently

4. What type of sources do you use in the library?

 Journals Books Annual Reports Other

If Other, explain _____

5. What was the last piece of information you looked for and found? _____

6. What was the last information need you could not find? _____

7. Where do you currently go to find information you need?

8. How many, if any journals are you on the routing list for? _____
9. On average, how old is the journal by the time it reaches you? _____
10. What percentage of the time do you actually read an article in that journal? _____
11. What information sources do you feel are "must haves" to do your current job effectively?

12. What services could the library provide that would assist you in your position?

Thank you for your time. The library will review each of these and use them to help build a more user-beneficial library for you and your department.

ENGINEERING & RESEARCH LIBRARY/LEARNING CENTER
EVALUATION AND PLANNING SURVEY

****NOTE**** The Technical Information Section (TIS) includes the functions of both the Engineering & Research Library and the Research Staff Learning Center. Accordingly, in this survey, TIS will be used to indicate the services or resources of EITHER activity.

Please fill out the survey form as completely as possible. Do not spend a lot of time on each question - we would rather have your first impression. Your individual responses will remain completely confidential. This is your opportunity to express your information needs and opinions!

PLEASE RETURN YOUR COMPLETED SURVEY TO:
June 20, 1986.

USAGE & AWARENESS OF TIS (General)

1. Were you aware of the Library/Learning Center (TIS) prior to this survey?
_____ Yes _____ No (If no, proceed to question 9.)
2. How frequently do you use TIS (Learning Center/Library)? (For any purpose: visits, loans, online searches, calls, courseware, etc. Please check one.)
_____ Frequently (once or more per week)
_____ Regularly (once or more per month)
_____ Occasionally (once or more per quarter)
_____ Rarely (once or more per year)
_____ Don't use or use less than once per year
3. If you do not use TIS as much as you might, which of the following reasons best explain why? (Check all that apply.)
_____ Don't think the information I need is available at TIS
_____ Job does not require use of an information center/library
_____ Can't spare time away from job duties
_____ TIS not easily accessible from my location
_____ Don't know how to access TIS after staffed hours
_____ Other (Please explain) _____

4. Over the past year, has your usage of TIS
_____ Increased
_____ Decreased
_____ Remained about the same
If there is a change, can you tell us why? _____

This section asks you to estimate the value of TIS services and resources in carrying out your job responsibilities. Please give your first impression.

7. What impact do TIS services and resources have on your ability to do your job? (Check one.)

☐ Negligible impact
☐ Slight impact
☐ Moderate impact
☐ Significant impact
☐ Don't know

8. How many hours would you estimate TIS services and resources save you per month? (Check one.)

☐ Less than 1
☐ 1 - 5
☐ 6 - 10
☐ 11 - 20
☐ More than 20

FUTURE PLANNING FOR TIS

9. What one thing do you think the Library/Learning Center (TIS) could do to improve services for you? _____

10. Listed below are some possibilities for future expansion of the Research Staff Learning Center resources. Please indicate, from the following scale, the importance you would assign to each item (circle specific subjects if you wish):

1	2	3	4	5
Essential	Important	Helpful	Unimportant	No Opinion

☐ Technical courseware, e.g., artificial intelligence, project management, machining, robots, fluid dynamics, corrosion, friction and lubrication, relational databases, materials stability, thermodynamics, etc.

☐ Foreign languages

☐ Personal/professional development courseware, e.g., memory improvement, effective technical presentations, speed reading, interpersonal relationships, speaking skills, stress management, etc.

☐ Management development courseware, e.g., managing conflict, R&D management, supervisory leadership, strategic planning, team building, successful delegation, performance evaluation, etc.

☐ Audiocassettes of selected current books or conference proceedings (AAAS, etc.) for loan.

If you have additional comments concerning the Learning Center, please note:

18. How many years have you been employed at
- ☐ Less than 1 year
 - ☐ 1 - 5 years
 - ☐ 6 - 10 years
 - ☐ 11 - 15 years
 - ☐ 16 years or more
19. Please indicate your Compensation Roll:
- ☐ General Salary (SG's 1-5)
 - ☐ General Salary (SG's 6-8)
 - ☐ Management (SG's 9-10)
 - ☐ Supplemental Compensation (SG's 11-12)
20. Please indicate your education level:
- ☐ Less than Bachelor's degree
 - ☐ Bachelor's degree
 - ☐ Master's degree
 - ☐ Doctor's degree

THANK YOU FOR YOUR COOPERATION!

PLEASE PLACE ADDITIONAL COMMENTS AND SUGGESTIONS HERE:

PRSA INFORMATION CENTER

USER SURVEY

123

Thank you for using the PRSA Information Center. So that we can provide you with a more effective service and meet your changing information needs, please take a few moments to complete this questionnaire. Please return with the enclosed material.

PLEASE CHECK ALL THAT APPLY:

How often do you use the PRSA Information Center?

- ☐ First time user ☐ Once or more per year
☐ Less than once a year ☐ Once or more per month

What prompted you to use the PRSA Information Center?

- ☐ Promotional material ☐ Past experience
☐ Newsletter articles/PRJ ad ☐ Recommendation of a colleague
☐ Called headquarters/chapter for assistance
☐ Other (explain)

What kind of material did you request?

- ☐ Research information packet ☐ Nexis/Dialog/DataTimes search
☐ Loan binder ☐ Other (explain)

Which of the following best describes the reason for your request?

- ☐ Special project ☐ General reading for current awareness
☐ New business proposal ☐ Other (explain)

How important is the PRSA Information Center as a source of information in performing your job?

- ☐ Very important ☐ Somewhat important
☐ Important ☐ Not important

What types of materials have you borrowed from the PRSA Information Center?
(select all relevant)

- ☐ Industry information ☐ Sample materials
☐ Public relations issues and trends ☐ Current public issues
☐ Public relations techniques ☐ Other (explain)

Please tell us about any additional services the PRSA Information Center might provide to benefit you or your company.

If the following services were offered would you avail yourself of them at an additional fee?

Current awareness service	Yes	No
Subject specific bibliographies	Yes	No
Limited facsimile service	Yes	No

PLEASE PROVIDE US WITH FEEDBACK ON YOUR EXPERIENCE WITH THE INFORMATION CENTER:-

Requested materials received within adequate time frame.

1	2	3	4
Outstanding	Good	Fair	Poor

Materials provided met your reference and information needs.

1	2	3	4
Outstanding	Good	Fair	Poor

Currency of information provided.

1	2	3	4
Outstanding	Good	Fair	Poor

Comments:

Name (optional):

Years in Profession.

☐ 1-5	☐ 11-20
☐ 6-10	☐ 21+

List other libraries you use for research.

Would you use the PRSA Information Center again?

☐ Yes ☐ No

Would you be willing to give a testimonial?

☐ Yes ☐ No

A. CURRENT POSITION

Please tell us about yourself.

1. Operating company? _____ Building? _____
 Job title? _____
 How many years have you been with XXXX? _____ Years in current position? _____

2. Please check (✓) the list of professions to describe your primary area of specialization.

☐ Accounting/Finance	☐ Engineering	☐ Personnel/Human Resources
☐ Animal Science	☐ Environmental Science	☐ Pharmacology
☐ Biochemistry	☐ Immunology	☐ Plant Science
☐ Cell Biology	☐ Information Specialist/Librarian	☐ Production/Manufacturing
☐ Chemistry, analytical	☐ Law/Patent	☐ Purchasing
☐ Chemistry, organic	☐ Management/Planning	☐ Quality Control/Assurance
☐ Chemistry, physical	☐ Marketing/Sales	☐ Site Services
☐ Computers/Systems Analysis	☐ Medical/Safety	☐ Toxicology
☐ Commercial Development	☐ Molecular Biology	☐ Other _____

B. WORK-RELATED INFORMATION NEEDS

We would like to obtain an idea of your job-related information sources & needs, both library-related & other.

3. Please check (✓) information sources, other than the Information Center, you use to perform your work.

- ☐ Internal resources (Department library)
☐ External resources (Public libraries; University libraries)
☐ Direct computer access (Dialog; Internet)
☐ Information broker
☐ Other _____

C. INFORMATION CENTER RESOURCES - USAGE & SATISFACTION

In this section we are interested in your general use of the Information Center only.

4. Have you used the Information Center in the past year?
- ☐
- YES
- ☐
- NO

If NO, please skip to section H - NON-USERS on page 4.

5. Which of the following best describes how often you are in contact with the Information Center for any purpose (eg. visits, loans, photos, ordering articles by mail or phone...).

- ☐ Once per week ☐ Once per month ☐ Once per quarter ☐ Once per year or less often

6. How important is the Information Center as a source of information related to your job?

- ☐ Very important ☐ Somewhat important ☐ Not at all important

7. In using the Information Center, do you most often:

- ☐ Visit personally ☐ Send someone else ☐ Telephone ☐ Send requests via mail/Email/fax

8. How would you rate the overall
- quality
- of the Information Center services & resources?

- ☐ Above average
☐ Average
☐ Below average
☐ No frame of reference

9. How would you rate the overall
- response time
- when you contact the Information Center ?

- ☐ Above average
☐ Average
☐ Below average
☐ No frame of reference

10. Please indicate use & satisfaction using the following boxed rating scales:

USE			
1.	2.	3.	4.
Always (Once or more per week)	Sometimes (Once or more per quarter)	Never (No need)	Not aware of service

SATISFACTION			
1.	2.	3.	4.
Above average	Average	Below average	No opinion

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1	2	3	4		1	2	3	4	
General Collections:									
☐	☐	☐	☐	Books/Monographs	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Journals/Periodicals	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Indexes/Abstracts	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Annual Reports	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Directories/Reference books	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Audio-visual materials	☐	☐	☐	☐	If #3, why? _____
Finding Aids:									
☐	☐	☐	☐	INFOCAT	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Information Desk	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Current Contents	☐	☐	☐	☐	If #3, why? _____
Services:									
☐	☐	☐	☐	Borrowing services	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Photo Library	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Technical Reports	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Lab notebooks	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Photocopying service	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Online literature searches	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Reference service	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Interlibrary loan service	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Translations	☐	☐	☐	☐	If #3, why? _____
Facilities:									
☐	☐	☐	☐	Photocopying facilities	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Microfilm reading facilities	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Computer equipment	☐	☐	☐	☐	If #3, why? _____
☐	☐	☐	☐	Reading areas	☐	☐	☐	☐	If #3, why? _____

11. How could the Information Center more effectively communicate our services to your department? (seminars; mailings; tours, publications...)

D. INFORMATION CENTER RESOURCES - SPECIFIC USAGE & SATISFACTION

In this section we are interested in obtaining further information on your use & satisfaction of some specific Information Center services.

12. Please check (✓) the following questions regarding the LAST literature search you have done. If you have not had a computer search done by the Information Center in the last year, please skip to the next question.

Did the searcher accurately interpret your question? ☐ YES ☐ NO
 Were the results received in the time required? ☐ YES ☐ NO
 Were the number of references ☐ too many, ☐ about right, ☐ or too few?

13. Do you make use of Current Contents provided by the Information Center? ☐ YES ☐ NO

If NO, please indicate why not by checking (✓) the appropriate reasons.

- ☐ Need different journals/periodicals than those covered
- ☐ Have access to major journals/periodicals needed
- ☐ Do not have any need for journal/periodical articles
- ☐ Costs too much
- ☐ Do not know what it is
- ☐ Other _____

14. Has the new chargeback policy for photocopying service affected you?
If YES, how?

☐ YES ☐ NO

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15. Please assess the Information Center staff.

	Very good	Good	Poor	Very poor	No opinion
Availability	☐	☐	☐	☐	☐
Helpfulness	☐	☐	☐	☐	☐
Competence	☐	☐	☐	☐	☐

16. Do you use the computer system INFOCAT for searching & requesting materials maintained in the Information Centers? ☐ YES ☐ NO

If NO, please indicate why not by checking (✓) the appropriate reasons.

- ☐ Do not have access to IBM mainframe
☐ Too difficult
☐ Not Macintosh-like interface
☐ Not enough full text
☐ Do not know how to use
☐ Do not know what it is
☐ Other _____

E. RANKING OF SERVICES

17. Please RANK in order the services/resources you find most valuable. (ie: 1st rank=most important, 6th rank=least important)

- _____ Book
 _____ INFOCAT
 _____ Interlibrary Loan service
 _____ Journal/Periodical
 _____ Online literature searches
 _____ Photo Library

F. FUTURE NEEDS

18. The following are some programs/projects the Information Center might like to implement in the future. Please indicate usefulness & willingness to pay cost with the following ranking scales:

USEFULNESS

1. High
 2. Medium
 3. Low
 4. Not Applicable

WILLINGNESS TO PAY COST

1. All
 2. Part
 3. None

1	2	3	4		1	2	3
☐	☐	☐	☐	Screening & summarizing information for users	☐	☐	☐
☐	☐	☐	☐	Combining all catalogues into one computerized catalogue	☐	☐	☐
☐	☐	☐	☐	Personal access to outside databases (Dialog, STN Express, CAS...)	☐	☐	☐
☐	☐	☐	☐	Training programs to do your own searches	☐	☐	☐
☐	☐	☐	☐	Consulting for personal bibliographic database design	☐	☐	☐
☐	☐	☐	☐	Expanding the book collection	☐	☐	☐
☐	☐	☐	☐	Expanding the journal/periodical collection	☐	☐	☐
☐	☐	☐	☐	Expanding the audio-visual collection	☐	☐	☐
☐	☐	☐	☐	Online index to Physical Constants Data Sheets	☐	☐	☐
☐	☐	☐	☐	Personal/Professional developmental material	☐	☐	☐
☐	☐	☐	☐	Personal access to catalogues of local libraries/universities	☐	☐	☐
☐	☐	☐	☐	Expanded reading area	☐	☐	☐
☐	☐	☐	☐	Full text access to reports & notebooks	☐	☐	☐

19. What one thing do you think the Information Center could do to improve services for you?

G. COMMENTS

20. If you would like to add any other comments about the Information Center services, please comment in as detailed a manner as you like.

H. NON-USERS

21. Please check (✓) reasons why you do not use the Information Center.

- ☐ Does not offer any services/resources that I need
☐ Do not know how to use/who to contact
☐ Poor service
☐ Not aware of the services/resources
☐ Did not know the Information Center existed
☐ Other _____
☐ Prefer to use other sources of information. Please elaborate. _____

22. Are there any services or resources which the Information Center could offer that would cause you to use it?

☐ YES ☐ NO

If YES, please specify what services. (You may want to consult section F - FUTURE NEEDS)

APPENDIX E

Library Budget

Library Proposed Budget/ 1998						
Item	Sub Item	Description	Breakdown/Rationale	Actual Costs for 1997	Projected costs for 1998	
1.a		Library Computer Hardware & Software				
	1	Comp hardware	Two systems (Pentium) @ \$2000	\$ -	\$ 4,000.00	
	2	Internet (On-line) Reference/Research Services	Contract w/ Dialog incl. Medline, Grateful Med, etc. plus training	\$ -	\$ 2,000.00	
	3	PDR w/Merck Manual and Stedmans Med	Yearly cost (1-50 users) set up on LAN CD-ROM version	\$ -	\$ 4,740.00	
	4	Code of Federal Regulations	Titles, 4, 21, 45 all parts approx. cost	\$ 500.00	\$ 500.00	
		Sub Total		\$ 500.00	\$ 11,240.00	
2.a		Staff costs				
	1	Library Specialist Consultant on contract	50 hours @ 12 hours a week \$25 per hour	\$ 10,000.00	\$ 15,000.00	
		Sub Total		\$ 10,000.00	\$ 15,000.00	
3.a		Collection Maintenance and Expansion				
	1	Mini Ref Centers; incl. PDR, Nonprescrip. PDR, DSM-IV, Dorland's Med Dict, Merck Manual.	12 centers may be partially replaced by purchase of CD-ROM product	\$ 3,219.77	\$ 1,197.60	
	2	Update annual core reference texts	Core ref collection as stated in Collection Development Policy	\$ 1,000.00	\$ 1,000.00	
	3	Core Journal collection	Current journals are held by individual departments. Move of subscription to library would be a net savings to Quintiles and guarantee timely arrival	\$ -	\$ 2,000.00	
		Sub Total		\$ 4,219.77	\$ 4,197.60	

4.a	Library Furnishings					
1	Full Height file cabinet		For use in expanding pamphlet file	\$ 200.00	\$ 200.00	200.00
2	Patron furnishings		Incl.; work table, plus two chairs- have no current work surface	\$ -	\$ -	2,000.00
3	Staff furnishings		Incl.; 1 desk, 1 rolling chair- currently use folding chair and card table	\$ -	\$ -	2,000.00
4	Collection Furniture		Incl.; 5 additional shelving units, 1 library grade kick stool, 1 rolling book cart	\$ -	\$ -	1,575.00
5	Misc. Library Supplies		Incl.; book ends, video covers, label covers, Book pockets, book cards, ink stamps.	\$ 100.00	\$ 100.00	350.00
	Sub Total			\$ 300.00	\$ 300.00	6,125.00
	Total			\$ 15,019.77	\$ 15,019.77	62,802.60
	Notes:					
	Cost of tech support for the library system software (dB Text/ InMagic) is covered via the MIS Department budget, as is the 1998 upgrade and license expansion.					
	A total of \$1350.00 for these items has been added to the MIS budget and so is not reflected here.					

APPENDIX F**Sample Library Brochure**

**Quintiles
CNS Therapeutics
San Diego**

Library

Let us help make your job
easier. Contact your
library with any questions
or suggestions today!

Your in-house reference center

Quintiles CNS Therapeutics now has its own library to help you acquire the information you need, when you need it! We welcome the opportunity to assist you.

Location

Quintiles CNS Therapeutics
10201 Wateridge Circle
San Diego, CA 92121

*The library is located on the fourth floor of building B on the east side adjacent to the kitchen.

You can reach us in person, or via e-mail.

Saway@gsnd.quintiles.com

Or

619-646-2734

Hours

Library staff is available to assist you Mondays, Tuesdays and Thursdays from 9:00 - 1:00pm. However, the facilities are open to you during all normal business hours.

Services

- Designated Internet terminal with ISDN line.
- Automated Library catalog
- CFRs title 21-all parts.
- 40+ Reference books for in-house use including, "Dorland's", "Gray's Anatomy" and "Guide to Good Clinical Practice" as well as other authoritative texts.
- 300+ books to check out
- 80+ journals
- Assessment/Rating scale collection.
- Over 125 videos
- Pamphlet file containing basic conditional information.
- FOI information on past studies available for in house use.

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March 29, 1999

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Sincerely,

A handwritten signature in black ink, appearing to read "John H. Goss". The signature is fluid and cursive, with a large initial "J" and "H".

John H. Goss
Director, Marketing

Quintiles Pacific, Inc.
10201 Wateridge Circle
San Diego, California 92121
619 552 3400 / Fax 619 552 0611

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Sincerely,

Robin Smith
Clinical Training Manager
Quintiles University,
Quintiles CNS Therapeutics

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Sincerely,

Brenda Vargus
Public Relations Society of America