

How To Organize and Operate an Information Center on Alcohol, Tobacco and Other Drugs

A Guide

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This Guide represents one small part of an on-going North American collaboration to address and prevent problems attendant to alcohol, tobacco, and other drug use. It is a collaborative effort of the Canadian Centre on Substance Abuse, the U.S. Center for Substance Abuse Prevention, and Substance Abuse Librarians and Information Specialists, coordinated by the Project Cork Institute. The goal is to provide a basic introduction to the many facets of an information center and what is required to run a center efficiently and economically. This Guide is directed to several audiences, but in particular to small government-sponsored information centers in North America, as well as those sponsored by agencies, organizations, and treatment and prevention centers.

This publication grew out of an earlier collaborative effort of the sponsors and the World Health Organization to facilitate the creation of information centers in developing countries. The publication that resulted was entitled, *How to Start and Run an Alcohol and Other Drug Information Centre : A Guide*.

The editors and contributors hope that this publication will serve as a catalyst for continued development in the field of information services. It demonstrates a recognition of the importance of the role of information in efforts to reduce and eliminate the problems associated with alcohol, tobacco, and other drugs.

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TABLE OF CONTENTS

Section 1.

Basic Activities

Basic Services	1
Targeted Users	1
Range of Services	2
Fees for Selected Users	3
Anticipating Needs of Targeted Users	4
Activities that Facilitate Providing Services	4
Suggested Reading	6

Section 2.

Organization of the Center

Staff of the Center	7
Librarian/Director or Information Professional	7
Library Technician	11
Clerical Assistant	12
Space and Equipment	12
Basic Considerations	12
Furniture, Equipment and Supplies	13
Sources of Library Supplies, Equipment and Furniture	15
Suggested Reading	15

Section 3.

Basic Procedures

Developing the Collection	17
Policy to Guide Selection	17
Scope	18
Identifying Existing Information Collections	21
Non-traditional Information Sources	21
Government Documents Clearinghouse Network	22
Cultivating Contacts	22
Technical Services	23
Identifying Materials	23
Acquisitions	23
Requesting Materials: Sample Letter	25
Arranging the Collection: Classification	25
Choosing a Classification System	26
Classification Numbers	27
Cataloging Materials	27
Subjects, Descriptors or Controlled Vocabulary	28
Creating and Using Databases	29
Processing Materials	31
Setting Up Subject Files	32
The Alcohol and Other Drug Thesaurus	36

Designing a Circulation System	38
Resources	40
Sources of Library Supplies and Equipment	40
Subscription Services	40
Suggested Reading	40
Cataloging	40
Purchasing Books, Serials and Equipment	41

Section 4.

Computers, Telecommunications and the Internet

The Computer: A Management Tool	42
Selecting a Computer System	43
Setting-up Procedures and Conventions	45
Public Databases vs. In-House Databases	47
Telecommunications	48
Cost-Effective Use	48
The Internet Link	49
What is the Internet?	49
Forms of Telecommunications	50
Using Telecommunications	51
Navigating the “On-Ramp”	52
PREVline	53
Traveling the Super-highway, via PREVline	53
Equipment	56
More about the “On-Ramp”	56
Internet Service Providers	57
Resources	58
Computer Software for Library Management	58
Suggested Reading	58
Automated Systems	58
The Internet	59

Section 5.

User Services

Core Services	62
How to Serve Users	62
Providing Reference Services	62
Conducting a Reference Interview	64
Circulating Collection	65
Document Delivery	65
Ethical Considerations	67
Code of Ethics	68
Copyright Law	69
Suggested Reading	70
Reference	70
Copyright	70
Ethics	71

Section 6.

Promotion and Funding

Promoting the Information Center	72
Suggestions for Promotional Activities	72
Budgeting	74
Budgets as Tools for Planning	75
Revenue	76
Fees	76
Suggested Reading	78
Promotion	78
Budgets	78

Section 7.

Evaluating the Information Center

The Need for Self-Evaluation	79
The Link Between Evaluation and Center Goals	79
Reviewing Services	79
Questions about Effectiveness	84
Questions about Efficiency	84
Surveying Users	84
Designing a Survey	85
Selecting a Sample	85
Analyzing the Data	87
Statistical Analysis	88
Summarizing the Findings	89
Using the Results	89
Suggested Reading	89

Section 1. Basic Activities

Basic Services

The information center, as described here, is one which systematically identifies, obtains, organizes, and provides its clients access to all the relevant information on a particular topic. It may hand-deliver materials to a client's desk or respond via telephone, fax, mail, or e-mail.

The information center is proactive. It tries to anticipate the needs of its users, not just respond. It actively publicizes its services and simplifies access for clients. It provides an actual answer to a question, not just a bibliography or a book in which the answer may be found — unless, of course, that is what the client wants.

Many community organizations distribute informational materials as a part of their public education efforts. Generally this information is not indexed and stored in the center. These organizations are *distribution centers* offering primarily distribution of materials and are not information centers of the type focused on in this document.

Targeted Users

An information center will have a targeted set of people to whom its services are tailored and directed. These groups may include some or all of the following:

Students	Staff within the sponsor organization
Teachers	Staff of other organizations
Health care workers	Business leaders
Government officials	Researchers
General public	

The information center needs to carefully select the clients it intends to serve. This helps set priorities for selecting materials for the center as well as helping to define the particular services it will offer.

Information centers need to anticipate that they will be contacted by those outside their targeted set of users. In anticipation of these requests the center can identify other agencies or groups to whom such requests can be directed. Inevitably, at some point Alcohol and Other Drug (ATOD) Information Centers will be asked to provide medical advice. Or they will be asked to suggest a referral source for treatment. These requests are typically beyond the scope of the center's expertise and not part of its services. However, again, this does not mean that the center cannot be helpful. On such occasions the person may be referred to a hotline or

other program that does provide referrals or the individual may be invited to browse in a directory of treatment programs.

An important goal of the information center is never to send a user away empty handed. If the center doesn't have what the user is looking for, the user should at least be given the phone number of a larger center that may be able to help or possibly the name of a person who might suggest a way of getting an answer.

Information centers can offer a range of services. The specific services a particular center offers will vary. The particular constellation of services will depend upon the mission or purpose of the center – who it is intended to serve, what objectives it has in mind, the extent and type of other resources in the community, and what budget is available to the center.

Range of Services

Some of the basic services that a center may offer include:

Browsing Collection.

A collection of materials accessible to walk-in users. Collections located in private offices or with inadequate lighting or ventilation are generally not accessible.

Circulating Materials.

This service allows users to borrow materials such as books, videotapes, or reports from a center's collection.

Inter-Library Loan.

A center makes arrangements with another library or a library organization to secure materials that are not in its own collection. An inter-library loan system of cooperating libraries makes materials in one collection available to other libraries. A formal agreement that may include a fee schedule is often agreed upon by two or more libraries or among members of a library organization such as *Substance Abuse Librarians and Information Specialists (SALIS)*.

Document Delivery.

This service provides a user with a copy of a document that need not be returned. The user is not required to come to the center. Most commonly a photocopy of a relevant article or "handout" is provided. The center must follow the *fair use* guidelines specified by copyright law when providing photocopying services. Copyright law is discussed in *Section 5*.

Reference Service.

Reference service can be offered at several levels determined by the needs of the users and the goals of the center. Reference service can involve assistance to a user as s/he searches for an answer. Or reference service may mean a staff member locates information for a client without involving the user in the pro-

cess.

Some centers require users to come into the center to locate the information with minimal assistance. Other centers respond to telephone requests and hand deliver answers directly to a requester's desk.

Requests for reference services may range from locating a simple fact, such as "What is the per capita consumption of alcohol in New York state?" to assembling all that is available on a particular topic, such as would be necessary to respond to the question, "What is currently being done in the area of substance abuse treatment within the criminal justice system?"

The center's staff, in addition to locating the requested information, may also organize or cull it for the user.

Many centers provide different types of services to different groups of users. Thus, while a center may not lend materials to the general public, it may allow members of its own organization to borrow materials in its collection.

Services to some groups may be provided *gratis* because those groups are key to the goals and purpose of the center.

Fees for Selected Users

However, there are other potential users for the center's services. The center can serve these individuals and groups on a fee-for-service basis. Fee schedules can be established to cover the direct and indirect costs of providing services. On a fee-basis, or with adequate funding, the following additional services might be offered.

Information on Demand.

Analogous to reference services. The fee will reflect all the costs associated with delivering information to a user, including time spent searching databases and charges for photocopying or telephone/fax use.

Indexing Services.

Offered to clients who need professional assistance to organize a reprint collection, subject files, or other collection.

Current Awareness.

A periodic service that searches new serials and/or database updates to help clients stay abreast of developments in a subject of interest. An ATOD center might offer current awareness on "treatment outcome studies," "health care reform," "drug therapy for alcohol detoxification," or any topic requested. Results can be delivered by e-mail or in print.

Anticipating Needs of Targeted Users

It is imperative that a center be able to meet the information needs of its own organization before offering fee-based services, unless this is a specific mandate from the organization. The center should assume a proactive role within the organization and for its targeted users. It should anticipate their information needs and be prepared to offer desktop delivery of materials of interest. By doing this, the center becomes an important and integral component of the organization. The center should be highly visible, publicizing its services and the ways it can facilitate the work of others. If the services of the center are valued by the administrators of the organization, the value of the center's contribution to its targeted users will be better understood.

To assume a proactive role, the director must be knowledgeable of the activities and the issues of concern in the organization. S/he should arrange to attend meetings of project staff, editorial boards, and other meetings where organization issues and policy are discussed.

Activities that Facilitate Providing Services

Many information centers find the following activities helpful in providing basic services.

Preparing Handouts.

Virtually every center finds that it has a number of frequently asked questions. A center can save time by preparing handouts that address those issues. For example, the center can prepare annotated bibliographies of books, articles, and reports on a topic.

Handouts must be updated regularly if they are to be useful. Rather than creating its own handouts, if permission is obtained, a center may find it more economical to distribute handouts prepared by other organizations.

Assembling Information Packets.

Handouts may be assembled to create information packets on popular topics. Beyond their use in responding to specific questions, the packets may be used as a means of reaching out to groups or individuals.

Information packets are particularly useful in providing information to people who may hesitate to ask questions. Packets can also be useful in responding to teachers and health care workers who frequently contact the information center. These packets are most effective when they are directed at a particular audience.

When preparing information packets or handouts, it is important to include the date prepared or assembled and the name of the organization or individual that

prepared the materials. If materials from another center are used, it is important to obtain permission and give proper credit to those whose work is being distributed.

Collaborating with Others.

Sometimes called “networking,” this involves sharing resources and cooperating with others who provide information services. Such collaboration has many benefits. Cooperation among professionals can improve the services each provides. The specialized alcohol and other drug information center becomes better known and, thus, more available to potential users.

Collaboration among centers can also lead to sharing professional expertise and developing interlibrary loan agreements. Staff members can assist each other in professional development and training.

Training Staff of Other Information Centers and Libraries.

People often take their questions about addictions to non-specialized centers and libraries. Alcohol and other drug information centers can provide training on the addictions to the staff of other centers to enable them to respond more effectively. The addictions center can also develop information packets directed to information professionals in other organizations.

Community Outreach.

Providing pamphlets and posters to a neighborhood health fair or school program can be an important service to the broader community as well as a most effective means of publicizing the information center.

Professional Contacts.

Establishing and maintaining contacts among information and substance abuse professionals is an essential part of the center’s activities. This enables the center’s staff to remain current and knowledgeable both about developments in the addictions field and in information management. The center will benefit from sharing of information, development of inter-organizational and professional collaborative efforts, and even adoption of mutual standards to facilitate the use of information. Important activities include:

* Professional Memberships.

Maintaining active memberships in substance abuse and library organizations such as *Substance Abuse Librarians and Information Specialists (SALIS)*, *Special Libraries Association (SLA)* and *Medical Library Association (MLA)*. More information about these organizations is found in *Appendix A*. Memberships generally include a subscription to an association journal, opportunities to obtain other special publications, and opportunities to attend workshops and professional education meetings.

* Involvement in Professional Associations.

The value of a professional association lies, in large measure, with the willing-

ness of its members to be actively involved and to contribute to the organization. This can entail serving on a committee, thoughtfully responding to a survey sent out to members, or responding to informal requests from colleagues.

* Attendance at Professional Meetings.

Attending conferences, workshops, and professional meetings can be an important source of new ideas, information, and contacts.

Also of importance is providing feedback and comments to professional colleagues. One of the important things which professional colleagues do for one another is provide support, affirmation, and recognition for one's efforts in a fashion that neither users nor employers can do. This may involve comment upon materials that are particularly useful, meet a special need of a center, or represent a major effort.

Finally, too, there is a value in asking questions. A thoughtful question is as valuable as the answer it engenders. Something which is a concern or problem for you often represents a concern that is not unique to your circumstances. By voicing the question you may raise an issue that has broad interest to your colleagues.

Use of the Internet or Other Computer Network.

E-mail enables users to communicate and share information with colleagues virtually instantaneously. Beyond access to people, the Internet also offers access to a wealth of databases with bibliographical, statistical, and other kinds of information as well as a host of other services. For more information on the Internet see *Section 4*.

Suggested Reading

Webb SP. *Creating an Information Service*. London, England : Association for Information Management, 1985. 101 pp. ISBN: 0 85142 186 5.

Katz B (ed.). *The How-To-Do-It Manual for Small Libraries*. New York : Neal Schuman Publishers, 1987. 386 pp. \$39.95. ISBN: 1 55570 016 0.

Soper ME; Osborne LV; Zweizig. *The Librarian's Thesaurus: A Concise Guide to Library and Information Terms*. Chicago, IL : American Library Association, 1990. \$20 (Members \$18). 164 pp. ISBN 0 8389 0530 7.

Section 2. Organization of the Center

Staff of the Center

The staff of the information center is the key to the quality of the information services it will provide. A center's staff can be divided into three levels — information professionals, technical assistants, and clerical assistants. It is important that administrators in the organization understand the level of service that can reasonably be expected from each of these employees. The training and background of the staff determine whether a library is simply a storage area or an effective provider of information services.

The Librarian/Director or Information Professional

Although *information professional* or *information specialist* may be a more apt description, *librarian* is a commonly used title for the person who heads an information center. In fact, the term “information professional” may inadvertently introduce confusion. This is because it is sometimes used for individuals in the area of computer science or management information systems as well as for those in the area of library information services. It is the latter which is being discussed here.

The director in charge of an information center needs to be:

- * creative
- * energetic and enthusiastic
- * attentive to detail
- * oriented to customer service
- * comfortable with hi-tech equipment
- * well-organized with strong administrative skills
- * familiar with computerized library systems

The director has two major roles. One is related to *planning* for the center. The other is *overseeing the routine tasks* that ensure smooth operation. Many of the routine tasks can be delegated to an assistant so that the director can focus on the more complex issues of planning and providing services to meet the needs of priority users.

It is recommended that the director hold a degree from an American Library Association accredited Masters of Library/Information Sciences (MLS) program. S/he should have both organizational and interpersonal skills

If funding is not available to hire a professional librarian, it is strongly advised that arrangements be made to secure regular consultation on reference and technical processes with a professional librarian. This is important not only at the point of organizing the center and developing its basic procedures, but also to assist in reviewing its on-going operations and in assessing problems which may arise, or to help identify problems of which the staff may not be aware. In the longer term, however, consultations are unlikely to be a satisfactory sub-

stitute for an on-site professional librarian/director.

Initial Tasks.

There are several key tasks, outlined below, that fall to the director as part of the process of organizing an information center. The director will need to:

A center's services must become vital to the daily functions of the organization.

1. Identify the Targeted Users and Determine Their Special Needs.

Include interested high-level administrators and others in the organization as well as specific groups whom these administrators wish to serve.

Information services are rarely given budgetary priorities if their activities are not vital to the daily running of the organization. Don't wait to be asked! Think about ways the value of the information center can be demonstrated to the administration and regularly pass along a relevant newspaper clipping, an abstract from a journal article, or the table of contents of an interesting book.

Be sensitive to individual reading habits. Some people do not like to receive unsolicited information – anything sent to them should have high relevance, be one page or less, and be sent at infrequent intervals.

Meet with targeted users to decide what resources should be available in the center and what services should be provided. Become aware of the special needs and concerns of different parts of the organization and the community. Targeted users will begin to learn about the center, even before it opens.

2. Set Goals for the Center.

For goals to be useful measures, they need to be considered in terms of specific behaviors or measurable outcomes. By way of example, goals for the center might include —

- * Talking to five potential new users a month about the center.
- * Talking to one local expert on alcohol and other drug abuse each week.
- * Developing within one year a brochure describing the center.
- * Contacting selected alcohol and drug organizations at least once a year.
- * Building a collection of x number of books and reports within one year.
- * Collecting information on x topics within one year.

In addition, the director will need to make decisions about:

- * Use of space – how should the materials be housed so that information can be readily found?
- * Furniture and equipment that the center will require – this includes diverse issues such as identifying items obtainable from within the organization and preparing a list of items to be purchased.
- * Selection of computer hardware and software.
- * Selection of cataloging and classification systems.
- * Circulation policies – should the use of some materials be restricted to

use in the center? Documents that are frequently used, expensive, or difficult to replace and not available for loan constitute the center's *Reference Collection*. For books or other documents that are available for loan, what is a reasonable loan period? What circulation system will be adopted or developed to keep track of materials that have been borrowed by users? How will overdue materials be handled?

3. Create a Manual of Policies and Procedures.

The director must establish the center's policies and rules. Policies refer to the general guidelines or rules that guide the center's activities. In contrast, procedures represent the exact steps involved in attending to the day-to-day tasks of the center – a basic guide of the “how-to.”

The policy statement setting forth the general rules for the center's activities would spell out, for example, the kinds of materials the collection encompasses and its priorities in terms of users. By way of example, one policy might state that the information center collects materials published in English and Spanish but not materials in other languages. Another policy might state who will be allowed to borrow what materials and for how long. A policy manual should be prepared which sets forth in clear, step-by-step detail how the center will undertake different, discrete tasks such as: selecting, ordering, processing, and recording the arrival of materials.

Additional topics for the policy and procedure manual may include:

- * Introduction: include a statement of the center's relationship to the host organization and the services it provides.
- * Job descriptions: include volunteers as well as staff positions.
- * Role and functions of the advisory group: describe its composition.
- * Samples of reports and key documents.
- * Details of agreements between the center and cooperating libraries and commercial services.

Since there are inevitable changes and additions to any set of procedures, it is suggested that the manual be assembled in a loose-leaf format.

4. Identify Resources on Alcohol and Other Drugs.

Resources may include books, reports, videos, posters, and more. Experts in the immediate community, the region, or the country may also be considered resources for the information center. Finally, groups and organizations with a special interest in alcohol and drug issues should also be identified.

5. Develop Contacts.

The director should be an active member of the sponsoring organization. In particular, as an expert on information identification and dissemination, it is suggested that the director serve on “in-house” committees in addition to working closely with special projects. It is also important to create and nurture contacts with other professionals and organizations. Information centers are

most effective and efficient when they are familiar with their counterparts elsewhere and when they interact to forge a network benefiting all of their members.

6. Select an Advisory Group.

An advisory body can help the center in multiple ways. One is by reviewing policies and materials. It can provide guidance and feedback to the director in respect to the needs of target users. An advisory group can also be an advocate for the center. Advisory groups that function well are those whose members are genuinely interested in the center's efforts and goals. The group should represent a diversity of expertise, which might range from information specialists to those informed of the needs of targeted users, those with special expertise in the area of alcohol and other drugs, or those with skills in business and management.

Routine Tasks of the Director.

Routine tasks of the director can be divided into three areas: administrative tasks, technical tasks, and user service/relations tasks.

Administrative Tasks.

Include all of those activities which are central to oversight of the daily tasks. Examples:

- * Attention to procedures necessary to keep the center in order and the information up-to-date.
- * Establishing and monitoring budgets – includes a variety of activities such as selecting vendors for book purchases and supplies.
- * Supervision and training of personnel, both paid staff and volunteers.

Technical Tasks.

Include overseeing services which are essential to underpin the center's operations. Examples:

- * Knowing that the selections and acquisitions for the center correspond with its written policy.
- * Knowing that the selected classification cataloging system is resulting in a usable and searchable collection.
- * Knowing the problems encountered in identifying and obtaining relevant information.
- * Developing procedures for handling classification, processing, and organizing of materials.

If the director is not professionally trained, opportunities to learn some of the specialized skills needed to run the many systems vital to information centers should be sought. These may appear as short courses offered by *SALIS* or *CSAP* for *RADAR* centers, or through local organizations of librarians (often chapters of the American Library Association or the Special Libraries Association) or even informal arrangements with public or special librarians in the area.

User Service/Relations Tasks.

Include overseeing all aspects of user satisfaction, including responding to correspondence from users. A major portion of this work may be the provision of reference services if the center has no other staff to perform this very important work.

This area also encompasses a diversity of activities undertaken both to promote awareness of the center and promote its use. It is important to look at the administrative and technical routines as they are viewed by the user.

Preparing an Annual Report.

An annual report may not be required by the sponsoring organization. However, even if that is the case, preparation of an annual report can be a useful activity. For one, it forces — or provides the opportunity for — the director to reflect on the center's activities. When one is preoccupied with day-to-day concerns, it's very easy to lose sight of the big picture.

An annual report is also a useful vehicle for keeping others informed about the information center. Be sure to send a copy to the head of the funding agency. Such a report provides that individual with a clear picture of the information center's activities. It also conveys information that can be used to represent the center, as well as to justify increasing or continuing funding and to assess the value of the center to the larger organization and community.

The annual report should include an introductory statement of objectives, as well as a summary of the year's activities: statistics that capture the efforts of the center for the year (see *Section 7*), a review of the budget, a description of professional development activities, updates on changes in staffing and equipment, and a statement of future plans.

Library Technician

A library technician is a key staff member in an information center. The ability of a center to provide timely information is dependent upon very careful attention to details so that materials can be quickly located. For example, if something is misfiled, it may physically be in the center but, for all practical purposes, it is lost. Trying to find it is equivalent to looking for the proverbial needle in a haystack.

The library technician is the staff person responsible for many of these tasks. S/he is trained in the technical procedures essential to the center's smooth operation. With minimum supervision, the technician carries out many of the basic tasks of the center. These might include processing new materials and preparing them to be placed in the collection and circulated. S/he maintains the circulation system, which means, for example, checking materials in and out of the center and following up on overdue items.

The library technician may also have responsibility for managing the serials in

Serial

A journal, newsletter, or any publication that is part of a series. Usually published several times a year at regular intervals. Each part = an issue and all the issues for one year = a volume.

the center's collection. This involves keeping track of subscriptions, recording the arrival of new issues, placing them in the indicated place for browsing, and shelving the older issues. Another major task, key to the smooth functioning of the center, is maintaining and weeding the subject files, as well as maintaining orderly arrangement of the shelves.

In assigning duties to the technician it is important to consider the person's work experience, word processing/computer skills, education, writing and speaking skills, and their degree of comfort in taking responsibility.

It is important to provide training for the Library Technician so that s/he can perform the duties assigned.

Clerical Assistant

A clerical assistant is *essential* if the director and the library technician are to have adequate time to attend to the activities described above. Information centers generate quantities of mundane filing, re-shelving of books, stamping and labeling new books and materials, etc. This can be very time consuming. The work must be done with care and should not be left to users themselves. A misplaced document is, essentially, a lost document.

Space and Equipment

Ideally an information center is easy-to-find. It should be a readily available and accessible "first stop" in any information search. If affiliated with a larger organization, it should be open and accessible throughout the organization's business hours. In addition, it should be inviting and be housed in an attractive space of its very own.

For anyone embarking upon the creation of a center, a visit to a well-established special library or information center can be a very useful first step. Typically an information center requires the use of several rooms or one large room with separated areas. The space is subdivided to allow for work space for staff and space for clients.

Basic Considerations

It is important to keep in mind that books and boxes of paper are very heavy. The area which will hold the collection must have a floor strong enough to support this weight.

Space should be available for clients involved in:

- * Individual study: this requires comfortable chairs and study carrels.
- * Group work: this requires a seating area in a place where quiet conversation will not disturb others.
- * Browsing: this requires accessible shelves, files and seating.
- * Photocopying: this requires a machine and method of payment.
- * Consultation with library staff: this requires a large desk or counter.

Space must be available for the staff to work efficiently. The staff work room should have floor space, counter space, and shelves for receiving and shipping books and other materials, and for cataloging, classification and physical processing of materials. Desks and adjustable chairs should provide a comfortable work environment.

Finally, space is required to display the collection and make it conveniently accessible to staff and clients.

Furniture, Equipment and Supplies

In addition to the furnishings needed to equip the staff and client work areas, the information center has other specialized needs. One is storage equipment. *File cabinets* are needed for organizing papers, pamphlets and reports. Lateral files with drawers that roll out laterally and can be opened clear of the file cabinet itself to provide 100% accessibility and visibility are preferable. *Bookshelves* must be durable, and “heavy-duty” to accommodate the weight of books. A unit with built in bookends from a library supplier is the most convenient.

Computers and Communications Equipment.

These will be used for multiple purposes, ranging from word processing to creating in-house database(s) to preparing bibliographies and providing clients with access to the library catalog. Either an IBM or Macintosh computer with a hard drive large enough to handle the center’s workload is required. Access to equipment or a system to efficiently back up large files on a regular basis is highly desirable. If users will be permitted to search the in-house catalog, additional computers or work stations should be available for them.

Consider purchasing new equipment from a local dealer who has been in business for while, even if they are hundreds of miles away. Although low-priced catalog ads look enticing, a local dealer will often allow one to try equipment before committing to it and may even set up and test the equipment, subsequently providing service and assistance. Unless your organization can provide in-house repairs, the longer warranties and service contracts offered at purchase may be good investments.

Essential Items:

External Tape Drive or Other Back-Up System.

Establishing a back-up system for the computer is essential. Regular back-ups should be performed and off-site storage arranged. In case of computer failure, it should be relatively easy to reload data and programs if regular back-ups have been performed.

Library Management Software.

There are specialized software programs designed for libraries. These include programmed modules to meet most library/ information center needs.

Laser or High Resolution Printer.

Section 2. Organization of the Center

These are used for correspondence, newsletters, preparing handouts and bibliographies, etc. An important tool for networking.

Fax/Modem.

To send and receive messages and to access the Internet; government, non-profit, and commercial databases; and various electronic bulletin boards.

Computer Supplies.

This includes items such as floppy disks, mouse pads, cleaning products for dusting equipment, etc.

Photocopy Machine.

Availability of the machine may help minimize missing copies of non-circulating materials.

Typewriter.

There are still some things a typewriter can do better than a computer. A typewriter remains a useful piece of office equipment for typing envelopes, preparing individual labels and completing forms.

Supplies for Organizing, Processing, and Repairing Materials.

Including: index cards, spine labels, book card pockets, book repair tape, self-inking stamp with the name of the information center, hanging folders for file drawers, shelving supplies (bookends, signs, shelf file boxes, etc.)

Optional or Desirable Items:

CD-ROM Workstation.

Hardware, software, and a collection of reference disks. Many commercial and most governmental databases will soon be available at reasonable costs.

Optical Scanner/Barcodes.

An enormous time-saver for larger collections that circulate.

Much of the above equipment may be available within the parent organization. This possibility should be explored before new equipment is ordered. In addition, contact your purchasing office who typically will have copies of recent catalogs and may have contractual arrangements with supply companies.

Much of the above equipment may be available within the parent organization. This possibility should be explored before new equipment is ordered. In addition, contact your purchasing office who typically will have copies of recent catalogs and may have contractual arrangements with supply companies.

**Sources of Library
Supplies, Equipment,
and Furniture**

Gaylord Bros.

Box 4901, Syracuse, NY 13221-4901

Other offices in Sanford, NC; Los Angeles, CA; Guelph,
Ontario.

Phone: 800/634-6307; Intl. 315/457-5070

Highsmith Co.

W5527 Highway 106, P.O. Box 800, Ft. Atkinson, WI 53538

Phone: 800/558-2110

Brodart Supply Division

1609 Memorial Avenue, Williamsport, PA 17705

Phone: 800/233-8959. Fax: 800/283-6087

Bro-Dart Canada:

109 Roy Blvd., Braneida Industrial Park, Brantford, Ontario N3T 5N3

Phone: 519/759-4350 (no charge)

Carr McLean Co.

Canada: 461 Horner Ave., Toronto, Ontario.

Phone: 800/268-2138; 416/252-3371

Defense Related Marketing Services, Operations Division

801/399-7833 Western states

614/692-3131 Eastern states

A free source of used office furniture and computers available to federal and state agencies. Ask for phone number of the Defense Reutilization Marketing Office in your state.

Suggested Reading

Christianson EB; King DE; Ahrensfield JL. *Special Libraries: A Guide for Management. Third Edition.* Washington, DC. : Special Libraries Association, 1991. 92 pp. \$25 (Members \$20). ISBN 0 87111 380 5.

Helps in planning and setting goals.

Davis MFC. "Staff and Personnel" In: Katz B. *The How to Do It Manual for Small Libraries.* New York : Neal-Schuman, 1988. pp. 71-83.

Fraley R. "The physical plant" In: Katz B. *The How to Do It Manual for Small Libraries.* New York : Neal-Schuman, 1988. pp. 91-101.

Freifeld R; Masyr C. *Space Planning in the Special Library.* Washington, D.C. : Special Libraries Association, 1991. 152 pp. \$41 (Members 32.50) ISBN 0 87111 356 2.

Aids in estimating needs, selecting materials, choosing a floor plan, etc. Suggests space

Section 2. Organization of the Center

standards. Present classic principles and modern application for planners of new facilities and library renovations.

The Librarian's Yellow Pages. P.O. Box, 179, Larchmont NY 10538. Phone: 800/235-9723. E-mail: database.carl.org@internet.

Annual serial. Free. Lists thousands of publications, products, and services for libraries and information centers. Each entry includes name, address, phone, fax, descriptive information and a topical category for the service provider. The 1995 print edition contained more than 200 pages of adds for products used by libraries. It is also available on the Internet where it is updated monthly.

Reed SG. *Small Libraries: A Handbook for Successful Management.* Jefferson, NC : McFarland & Co., Inc. Publishers, 1991. 142 pp. ISBN 0 89950 596 1. Directed to public libraries, but some of the material is relevant to special libraries. Discusses issues in hiring; evaluating and managing employees and volunteers; building and weeding a collection; providing services; etc. Annotated references.

Sager DJ. *Small Libraries: Organization and Operation.* Fort Atkinson, WI : Highsmith Press, 1993. ISBN 0 91784 616 8. 88 pp. \$10.95.

Directed to individuals with limited or no formal training in library science, the volume provides a concise introduction to the basic principles and procedures essential to most small libraries. Includes planning, ordering materials, organizing the collection, processing and lending materials and setting up an attractive an efficient facility.

Special Libraries Association. *Managing Small Special Libraries, 1992.* Washington, D.C. : SLA, 1992. Spiral Bound \$20 (Members: \$15) ISBN 0 87111 382 1

A kit containing recent articles about budget and fees, time management and human resources, public relations, quality, service and general management issues.

Sweeney D; Zilla K., eds. *Position Descriptions in Special Libraries, Second Edition.* Washington, D.C. : Special Libraries Association, 1992. 206p. \$31.25 (Members \$25). ISBN 0 87111 402 X.

Examples of more than 85 job descriptions in medical, academic and industrial libraries in addition to many other types of special libraries. Offers help on writing job descriptions and emphasizes the importance of computer skills in today's information world.

Section 3. Basic Procedures

Developing the Collection

To ensure that resources are well spent and that the center contains the information vital to its intended patrons, the center must have a clear sense of whom it wishes to serve, on what topics, and via which types of services. This point is of primary importance. Only after targeted users and their information needs have been identified can attention turn to developing policies to guide the center's selection of materials and to establishing development goals for its collection. Suggestions and guidance from administrators of the funding organization are important. It also serves to inform them about the center's efforts.

Policy to Guide Selection In considering the materials which an information center will use to respond to clients' needs, it is important to recognize that this does not mean that all of the items actually identified need to be acquired and physically located within the center. For example, the sponsoring agency may already have subscriptions to journals that the center anticipates would be of interest to its patrons. Or the center may be located near a large reference library that has a considerable collection of books on alcohol, tobacco, and other drugs, as well as serials. In such cases, the center may, at first, elect to rely upon some of the holdings of these other collections, rather than spend limited resources to duplicate materials it can already access. To maximize total resources, it is important to avoid unnecessary duplication of existing, readily accessible materials. The center should make efficient use of other collections when possible.

In developing its selection policy, a center has to consider which materials need to be immediately accessible in order to respond to users' needs promptly. Materials that are only needed infrequently can be borrowed from other collections.

Accordingly, the center should limit its purchases to materials that are important to the center's primary users and that are important to have on-site. The development of comprehensive collections is better left to nationally available resource and information centers with extensive funding. Becoming familiar with national centers and identifying the types of materials that can be obtained from them is an important activity.

In creating its *selection policy*, the center is establishing the guidelines it will follow as it builds its collection. This entails describing the types of materials the center will collect as well as specifying topics of special consideration. After a center is operational, its selection policy should be periodically reviewed to ensure that it is corresponding to the sponsoring organization's cur-

rent focus. If the sponsoring organization and its staff write and publish materials, the center should actively collect and catalog these in-house materials.

A selection policy, no matter how brief, can be invaluable when a center is confronted with specific decisions about buying expensive or controversial items. The scope of the collection, along with the services provided, determine the center's costs, the work load of the center's staff, and ultimately the functioning of the entire center.

The ultimate success of the center to some degree will be determined by its selection policy, the scope of the resulting collection, and the extent to which it meets the needs of the center's primary clients and the mandate given by the sponsoring organizations.

Scope

Because the scope of the collection is determined by the needs of those it will serve, it is important to focus on who those people are, i.e. health care professionals, administrators, the general public, special population groups, all of these, or only a subset. The question which follows from this is, "What do these users need?"

Surveying potential primary users can be helpful. Among the questions to ask are — "Which serials are important and to which should the center definitely subscribe?" "What specific books, documents and reports should be included in the collection?" "Are video and/or audio cassettes, posters, and news clippings essential components of the collection? If so, which ones?"

An important service of the center may be to collect, organize, and archive in-house publications. In many organizations this chore is overlooked, resulting in increasing chaos as time passes. Although this may not have been included in the original mandate for the creation of the center, it may prove to be an important way that the center can demonstrate its value. The creation of an annotated publications list of these materials can bring quick recognition to the center even as it is being compiled.

A related task may be to organize documents that are already on site. Books, journals, and reports may be scattered in offices and desk drawers or stored in file cabinets and storerooms. Quite possibly no one person knows what is already available or where it is located! To avoid duplication, if things are scattered throughout the organization, documents should be gathered and/or inventoried before additional copies of books or journals are purchased. Once again, this process and its myriad of related inquiries will increase the visibility of the center within the organization.

Beyond defining specific areas and types of information to collect, a related issue to consider is how inclusive it is important to be. Classifying, catalog-

ing, and housing each document demands resources. The center's collection can be quite far-ranging or limited to a specific topic. The center may restrict itself to only domestic information from local, regional, and national sources. Or it may wish definitely to include sources from not only North America, but beyond. The center also needs to decide whether materials will be collected in more than one language. French and Spanish may be essential. For a listing of the range of potential materials see the box in Figure 1.

Figure 1: Possible Types of Materials in a Center's Collection

In-house documents. For current distribution and for an archival collection.

Federal and State/Provincial Government Documents. Legislation, technical reports, policy and decision papers, surveys, memoranda, etc.

Reports. Prepared by non-governmental organizations or associations. May describe meetings or study groups.

Statistical Data. Found in books, serials, newspapers, government documents, etc.

Books and Monographs. These may be for reference use and not for general circulation.

Serials. Source of the latest facts, figures, and research findings. Possible to network with other libraries to share general topic serials and books.

Reference Materials. Directories, encyclopedias, handbooks, indexes, and bibliographies.

Bibliographies. Lists of publications on special subjects. Annotated bibliographies include comments or descriptions of the publications. Selected bibliographies do not include all the possible items on a topic and instead focus only on those publications considered by the compiler to be the most useful or important.

Public Education Materials. Examples of pamphlets, posters, books, videos, and any other materials used by health care workers and educators for their patients and students.

Materials for Program Development. These can include documents describing clinical, educational, and training or prevention programs.

Curricula. Courses of study developed for use at schools and universities.

Book Catalogs. Published by bookshops, wholesalers (jobbers), and publishers.

Pamphlets and Brochures. For distribution.

Notices of Meetings. A service to users.

Names and Addresses of Persons who are Experts on Alcohol- and Drug-Related Topics. For use when the center can find no answer to a query.

Information about Organizations and Treatment Centers. Among the most useful information in the center.

Audiovisuals (audiocassettes, videocassettes, films). Because they require a major expenditure of resources, this decision should be considered carefully.

***Identifying Existing
Information Collections***

The ability of a smaller collection to provide satisfactory service is dependent on several factors. One factor is the extent to which the center houses information which addresses the needs of its targeted users. The other is the extent to which the center can successfully link up with other centers. By linking itself to other library resources the information center has access to information that is located far beyond its own walls.

There are a number of places a center can turn to when it needs to identify sites with significant alcohol, tobacco, and other drug information. *Appendix A* sets forth a number of libraries and information centers which will be invaluable.

As a general strategy, consider contacting state/provincial or federal government information clearinghouses or libraries; libraries in general (university, medical, or public); special collections; and, finally, newspaper libraries and archives. To determine how any of these sources might be valuable to the center, ask each organization for a description of its collection, as well as a list of the serials to which it subscribes. The next question then becomes whether these materials are available for inter-library loan and, if so, whether or not an agreement for inter-library loan can be established.

***Non-traditional
Information Sources***

In addition to established libraries and information services, there are “non-traditional” resources to be kept in mind. These include researchers in academic and other research institutions, college and university faculty, treatment center professionals, substance abuse associations, private foundations and other non-governmental organizations, and publishers’ catalogs.

To successfully use these non-traditional information sources, know exactly what questions to ask and to whom the questions should be directed. A person who has some understanding of the subject of the question is more likely to elicit a useful response. If the librarian understands the issue surrounding the question well s/he should make the contact. If not, the name, address, and phone number, along with information indicating why that contact might be helpful, should be given to the client. The client should be encouraged to make the contact directly.

Don’t forget your own organization when it comes time to seek out non-traditional information sources. Those within the sponsoring organization may prove to be valuable sources of information for the center. Ask that the center be added to the distribution list for copies of all publicly available in-house reports and documents. Suggest to staff that the center is a good place to house “review” copies of books after the review has been written. Let it be known that “junk mail” is sometimes of high interest to an information center and can be forwarded to the center for processing, circulation, or disposal. Additionally, administrators and professionals may be able to suggest names of people and agencies to contact. Write to tell them about the information

center and offer them limited services. In turn, ask them to forward relevant information directly to the center.

Treatment professionals, researchers and community service people are other important non-traditional sources. Community professionals may know of information found in documents, presented at meetings, or other information that can be useful to the center. For this reason, being in contact with others on a regular basis is helpful.

***Government Documents
Clearinghouse Network***

The *Federal Drug, Alcohol and Crime Clearinghouse Network* was created by the U.S. Office of Drug Control Policy to provide easy access to federal drug clearinghouses. With just one phone call – 800/788-2800 – callers can be linked directly to any of the seven clearinghouses listed below:

National Clearinghouse for Alcohol and Drug Information
Drug and Crime Clearinghouse
Drug Information and Treatment Referral Line
Drug Free Workplace Helpline
CDC National AIDS Clearinghouse
National Criminal Justice Reference Service
HUD Drug Information and Strategy Clearinghouse

(More about each of these clearinghouses can be found in *Appendix A*.)

Thus the Clearinghouse Network phone number may be the fastest way for many people to find U.S. government documents and tap the wealth of publications and services offered by the clearinghouses. It is suggested that the center contact each of the above clearinghouses, ask for a copy of its catalog, and request special information it may have available.

Recent legislative reports and hearings are often not available from the clearinghouses. One way to obtain them is to contact the office of your senator or representative and request copies. Centers with computers, modems, and network access can download them directly from the Library of Congress's database, MARVEL. (See *Appendix F*)

Cultivating Contacts

One of a center's tasks is to expand the circle of resources upon which it can call. Equally important is nurturing those who now assist the center. When cultivating contacts, consider following:

- * As you meet new people, ask to be put on their organization's mailing lists to receive relevant publications.
- * Request that the center be added to publishers' mailing lists as well. Peruse the catalogs and file current issues.
- * At every opportunity, remind colleagues to tell you about new documents

that should be considered for the collection.

- * Offer to exchange information with other groups. Exchange newsletters, annual reports, research papers, conference papers, and promotional literature on a complimentary basis with other organizations. It is possible to receive some periodicals without paying subscription fees.
- * When documents arrive from an individual, send a thank you letter. This encourages a continued flow of publications.

Technical Services

Technical services in an information center are comprised of the systems used to develop and organize the collection. Every information center needs selection and acquisition systems to identify and place orders for books and serials, as well as a classification system to arrange materials and a cataloging system to index them so that they can be found later.

Identifying Materials

Selection Tools.

Identifying materials for purchase can become very time-consuming as stacks of catalogs, acquisitions lists, journals, and magazines begin to pile up. To provide guidance and to ease this task, librarians often use “selection tools.” Selection tools include anything that helps find and then evaluate new publications of interest. For example, many journals and newsletters publish reviews and information about new books or audiovisual materials. *Appendix B* describes a number of periodicals that are especially useful in reviewing new materials. Most librarians scan a number of periodicals regularly as part of identifying materials to add to a collection.

Publisher’s catalogs as well as acquisition lists prepared by other information centers in the substance abuse field can be valuable. In addition, the patrons of a center who are knowledgeable in the field are often excellent sources of recommendations. Encourage them to offer suggestions.

Keep in mind that many reference materials, as well as a growing number of serials, are now available in both print and electronic formats, such as CD-ROM or downloadable Internet files. Costs and availability of both the materials themselves and the equipment needed to use them will determine a center’s choices. It is expected that increasing numbers of centers will use these alternative formats as we enter the 21st century because of the ease of both searching and housing them.

Acquisitions

Having selected materials for the center, the next step is to acquire them. The center needs an efficient acquisitions system that will keep track of multiple orders and ensure that the center pays only for orders received in good

condition. It is often economical to select a preferred supplier for books and for serials. Dealing with multiple publishers can be costly in both time and dollars. Money saved by shopping about and placing several small orders may be offset by increased bookkeeping costs and time spent. "Jobbers," the term used for subscription and book purchasing services, are frequently used because it is possible to place a single order, receive one package, and pay one bill for a number of books. When problems occur, only one person must be contacted.

Generally, a jobber's prices will be the same as the direct cost to the center on academic journals and scholarly books. For popular magazines and journals, the jobber is often able to pass on discounts received from publishers. Jobbers are widely used because they can offer economies of scale, discounts on publishers' prices, and automated systems that provide accurate subscription management services for libraries. Centers ordering larger numbers of periodicals will find the management reports that a jobber can generate useful. For example, the jobber can produce a renewal check list, as well as a claims status report that summarizes any outstanding materials not received, along with publishers' responses.

Several centers might combine their subscription orders with one jobber, still receiving separate invoices and subscriptions. In this way, very small centers can still take advantage of the economies and conveniences of having to interact with only one source.

Cost should not be the only criteria for selecting a jobber or subscription vendor, however. Equally important is the jobber's dependability. This will be measured by its capacity to fill orders promptly and accurately, as well as its ability to correct errors quickly and without hassle. In addition, the billing routine should be one with which your organization can work. To select a jobber ask colleagues for suggestions and recommendations.

A jobber may not be needed by some centers if most of its serials are a part of an exchange process or were received as gifts. Each center has different needs and priorities. Each should choose an approach to serials acquisitions that is most appropriate for it.

**Requesting Materials:
Sample Letter**

September 1, 1995

Mary Jones
Small Town Information Center
Middletown, Any State 00011

National Clearinghouse for Alcohol and Drug Information
PO Box 2345
Rockville, MD 20852

Dear Madam/Sir:

Please send me your provide the full name and catalog number of the item of interest. I understand there is no charge for this item.

Please add the Small Town Information Center to your mailing list so that we might receive catalogs, announcements and updates.

or

I would like to order the following publication:

Author of publication, Title, Publisher's Name, Place of Publication, Date of Publication

Please send it to me at the above address with an invoice for payment. *OR* I am enclosing a (purchase order) check in full payment.

Thank you,

Mary Jones

Arranging the Collection: Classification

Information collections are valuable only when the information needed can be found. Unorganized collections are far less useful. For this reason centers adopt a classification system that arranges books on the shelves. A classification arrangement that places books about the same topic together on the shelf creates a collection conducive to browsing. The problem encountered in classifying a book is determining the major focus of the book and placing each book appropriately in relation to other books in the collection.

Books are not the only materials that an information center organizes or classifies. Often booklets, pamphlets, and reports contain the most current and important information. Many do not have hard covers and won't "stand up"

on a shelf. They can be stored in colorful, plastic or paperboard “*shelf file boxes*” or in file cabinets. Some centers use a library binding system or “hard-cover binders” for small documents so they can be conveniently shelved with books. *Serials* can be stored in “shelf file boxes” if they are not bound. Materials stored in boxes on the shelves are classified like books. Those stored in file cabinets are arranged by topics. The part of the collection housed in a file cabinet is referred to as a vertical or subject file.

Classified materials in libraries are usually divided into three sections: *Reference Collection*. Some documents will be used often and need to always be available. Some of these may be documents that the staff uses to answer questions. Some materials are very expensive and would be difficult to replace. For these reasons it may be wise to have them stay in the center. This non-circulating part of the collection is known as the *Reference Collection*.

Periodical Collection. This includes journals, magazines, newsletters and all other serials with ongoing titles that are published at regular intervals. Serials such as yearbooks and annual publications are usually housed with books. Many centers allow back issues of periodicals to circulate although for a shorter time than books do because of their generally broader use. The most recent issue of a periodical is usually reserved for use only in the center.

Circulating Collection. Circulating materials may be borrowed and taken out of the center. For centers restricting circulation of materials to a only a handful of staff members, a very basic system will suffice. For example, simply writing the name or number of the user on a book card next to the due date would most likely be both efficient and effective. Centers that circulate materials to a larger number of users will most often use more complex computerized circulation systems.

Choosing a Classification System A classification system is used to arrange books on shelves. The system is intended to group together documents on the same subject. Each subject is assigned a different classification number. There are several classification systems in use in North America today. The most commonly used systems are the Library of Congress Classification (USA), the Universal Decimal Classification (worldwide), and the Dewey Decimal System (USA and Great Britain). Each of these was developed for large collections that include *all* types of knowledge.

It is important to remember that once a center chooses a system to classify and catalog its materials and begins to use it, the cost of changing to another system becomes formidable. A center should not start to use a system without giving careful thought to both the initial cost and the cost of maintaining that system. The center should feel confident that the selected system will continue to be efficient and effective as its collection grows from 100 to 1000 or more books.

When a collection is small, it is often tempting to sidestep the need to purchase, install, and learn a professional system. But the eventual cost of recataloging and reclassifying an entire collection to convert it to a professional system later means this can be a very expensive decision. It is almost always appropriate for a small center to choose a professional classification system and then adapt and simplify it for use.

If a library or information center in your organization is already using a classification system, *use that system*. If your sponsoring organization is already using a classification system, ask the person who classifies material for the collection to also classify documents for the information center. Or, ask for help in learning to use the classification system.

If you have already used a classification system and know about it, then *use that system*. A third option is to approach an alcohol/drug information center with which you interact and discuss with the director the advisability of adopting the system being used in that center. A fourth option should only be considered if the collection contains less than a few hundred books and has absolutely no possibility of becoming larger. That option is to create one's own classification system.

Classification Numbers

Classifying a document gives it a unique code or label. This code tells what the book is about, who authored it, and when it was published. Classification systems use numbers or letters, or both. Often the classification system uses a code in three parts. The first part is the subject classification which tells the topic of the book. The second part is a code for the author's or editor's surname, often the first three letters. The last part is the year the document was published.

On the shelves the books are arranged by the first part of the call number which assigns a subject group. Then, within each group, the books are arranged alphabetically by the author's or editor's surname. When there is more than one document by an author, books are ordered by year of publication. This system places documents about the same subject together on the shelves, arranged alphabetically by author and then by the year published.

Cataloging Materials

Because of the necessity of choosing only one physical place to shelve a book, the center's catalog is the tool that, beyond browsing, helps the user find materials on a given subject. At the most basic level the catalog records an accession number, location or classification number, author, title, edition, publisher, place of publication, year of publication, International Standard Book Number (ISBN), and assigned subjects.

The catalog is the way to find books by your favorite authors or new books on your favorite topic. The card catalog that we all learned to use in school is

rapidly becoming obsolete, however. Its obsolescence has been accelerated by the cost of producing or buying multiple cards for each book and then filing them in a drawer in proper alphabetical order. Data entry on a computer is now faster, easier, and cheaper. In addition, it is possible to search a computerized database much more quickly and thoroughly than a card catalog.

Along with the computer has come a number of software products written specifically for library management. Librarians create in-house databases when creating a library catalog. The process is described below.

Because a computer allows one to find a book by searching in many different ways, the importance of the subject categories assigned by the cataloger has decreased and the ease of finding materials has increased. The importance of the cataloger's consistency in recording names, dates, and subjects remains.

There are a number of tools and services that have traditionally helped librarians create catalog records. MARC (Machine Readable Cataloging) records are available for most titles in the Library of Congress and are used by large libraries. However these are not easy for a small library to adapt. Unfortunately, although the National Institute for Alcohol Abuse and Alcoholism and the National Clearinghouse for Alcohol and Drug Information are cataloging most of the materials for their own databases and libraries, the cataloging data is not presently available to other libraries. If you can share cataloging data with a colleague using a similar computer system or obtain the data from a large AOD library, utilize it.

Many libraries and information centers that have created in-house databases are not using traditional library cataloging tools. This does not mean to imply that creating an online catalog or in-house database is easier. It's definitely not, it's just that a very different set of problems is presented.

Before a center can start cataloging it must confront the tasks of selecting a computer system, planning for its implementation, and training those who will be entering and searching the data. These tasks can be formidable.

***Subjects, Descriptors or
Controlled Vocabulary***

Once a computer system has been installed, the center must think about controlled vocabulary – the descriptors or subject terms that it will use to describe the materials. Descriptors should allow users to find materials using the words they usually think of. Although one can only put a document in one place and assign one classification number it, the number of descriptors assigned is theoretically unlimited. One of the important things to avoid is choosing random descriptors. This leads to chaos for the searcher. The result could be the need to search with 20 *different* descriptors merely to find all the materials on *one* subject. Basically, one should use a preselected list to avoid using synonyms in choosing descriptors for an automated system. A center can develop its own list by selecting descriptors from one of the Thesauri listed on

page two of Appendix A. Adapting a group of preselected descriptors from the NIAAA's *Thesaurus* is another way to help ensure consistency of descriptors while at the same time providing descriptors that are the same as those used for other many other databases.

Creating and Using Databases

If there is one activity or theme which encompasses an information center/library's essential functions, it is *organization*. The center must have an easy to use and reliable means for retrieving information. The basic purpose behind both classifying and cataloging materials is to make such retrieval possible.

Historically this has been the function of the card catalog. The card catalog, in fact, is a kind of database. Increasingly libraries and information centers are converting manual catalogs and library management systems to computerized systems. It is, without a doubt, much more cost-effective to organize a new center based on computerized systems. *Section 4* describes the many different ways in which computers are being used to handle many of the routine tasks of information centers in a fashion that is efficient and avoids redundancy.

What Is A Database?

The term *database* can refer to any systematized compilation of information. A database is simply a body of information that is gathered together in a systematic fashion. Thus, a telephone directory, library card catalog, and the directory of videotapes at the neighborhood video rental outlet all qualify as databases. It doesn't matter how the information is stored, whether it's on index cards, a series of typed lists, or on a computer. The fundamental element is that the information is arranged for rapid search and easy retrieval. Many libraries have converted their old databases, or catalogs, to computerized databases because these are, in fact, considerably less expensive to maintain and more efficient to use than the card catalog.

A telephone "directory" which contained all of the exact same information, but organized it differently – for example, having an alphabetical listing of only names, followed by a separate list of just addresses, and then another list strictly of telephone numbers – would no longer be a database. Such an arrangement would represent nothing more than a series of lists and be essentially useless, because the pieces of information were not linked together.

Although any collection of information which meets the criteria enumerated above is technically a database, in practice, the term is now used to refer to computerized systems which store and retrieve information. The introduction of computers has introduced possibilities for finding information which go far beyond the capacity of printed formats.

Quite possibly the databases that are most familiar are those maintained by virtually every establishment that rents videotapes for home use. Before one can rent a tape for the first time, there is some basic information that has to be provided. This information constitutes the computerized *record*. All databases are built upon records, which contain the information relevant to the particular database. Each different kind of information within the *record* constitutes a *field*.

For the videotape rental database, the record generally includes name, address, telephone number, names of family members who are able to rent on that account, listings of tapes currently rented along with titles and dates due, and a listing of unpaid late fees. The size of a database is often described in terms of the number of records. The way in which a database can be searched to find information is dependent upon the specific fields that are created for each record.

Usually the video store owner has a second database that lists all the tapes in the store. On that database there would be a separate record for each tape. The fields of information which each record might contain would be title, date of purchase, purchase price, number of times rented, loan status, category (family/action/drama /comedy/classic) and its audience rating, such as G, PG, PG-13, R, or NC-17.

It becomes apparent from the description in the box above that the videotape store has many features in common with a library.

Many libraries are converting their card catalog databases to computerized databases which are easier and less expensive to maintain and search. A library database is composed of a record for each item in its cataloged collection. Newspaper clippings, pamphlets and other items in the *vertical file* (also called the *subject file*) are customarily not cataloged and are not included in the database. Figure **xx** below outlines some of the fields that might constitute a record in an information center's database.

In-house Databases.

Those information centers that use a computer to record classification and catalog information specific to their collection are creating *in-house databases*. It is important that the center decide how detailed its in-house database will be. One can decide to enter only materials that stand on shelves and to exclude materials in subject files, for example. This is the choice that many centers make because news clippings and brochures are often only of current value and not saved indefinitely. Should the center decide to subject index individual chapters within edited volumes? This can multiply many fold the amount of work needed to add a book to the database. The personnel costs can become very high. If the chapter or other information is found on a publicly available database it may well be more economical and as convenient to use that database instead of duplicating the information in-house. As part of the decision to create one's own versus using an existing database, it is highly recommended that actual searches should be conducted for a range of materials so that the librarian fully understands what is included and excluded in each database and the time lag involved. If the results are less than satisfactory, then the librarian can appropriately defend his/her decision to invest resources in an in-house database.

Processing Materials

Accessioning. It is important that the center have a complete record of all materials in the collection. Accessioning is one way to do this. Each new document is assigned a unique number that is 1) written on the reverse side of the title page and 2) also recorded in the center's record keeping system. Accession numbers are not assigned to issues of serials that are a part of a subscription.

The accession number often includes digits that indicate the date of acquisition. If a manual system is used the number is recorded in a notebook called the *accession book*. If the center is using a computerized system the accession number would appear as a field in the computer record. Some programs assign the number automatically using the next available number and the current date. This provides the center with a chronological listing of acquired materials.

The next step is to place materials in the collection so they can be easily found and correctly replaced after use. Different kinds of documents are processed differently.

Books. To process a book, first stamp the name of the information center on the title page and on the last page to show the center owns it. Then assign a classification number to the book, selecting a number from the center's classification system. Next, either type the call number on a label or write it on the spine of the book. Finally, record the pertinent information in the center's computer record system or in the accession book.

Reports. Those with stiff covers or that are thick enough to “stand up” can be treated exactly as books – processed and then shelved. Thinner reports with floppy covers can be stored either in shelf file boxes or in a subject file cabinet as described below. Reports of importance to the center should be placed in a document binder and stored on the shelves, fully catalogued and classified. When reports are placed in shelf file boxes, they are assigned classification numbers. Write the classification number in the upper left corner of the soft cover, or on a label as for books if the binding is thick enough.

Documents of only temporary value are *not* processed as a part of the permanent collection. They are housed in the *subject file*. In file cabinets, arrange these documents in folders by subject heading. Write the selected topic from a list of standard subject headings on the upper left corner of the soft cover. This will allow the item to be returned to the proper place after it is used. Again, write or stamp the name of the information center on both the front page and the last pages as a mark of ownership.

Serials. Record the arrival of each new issue of a serial in the serial computer record or in the *serial record book*. This verifies its arrival. It also allows easy checking to claim missing issues. It answers the question, “Did the issue arrive and then get misplaced, or did it never arrive?” Stamp the name of the information center on the front cover and on the last page.

Pamphlets and Journal Articles . Stamp the name of the information center on the first and last pages. Next, choose a subject for the document using the guidelines in *Setting up Subject Files* below. Write the selected topic from a list of standard subject headings on an upper corner of the first page. This will allow the item to be returned to the proper place after it is used.

Setting Up Subject Files

The materials in the center that are not considered to have long term value should not be classified and cataloged. Such items include “floppy documents,” meaning those without stiff covers such as pamphlets, newspaper clippings, or catalogs — often items of only transient interest. Such items are typically stored in what are termed *subject* or *vertical files*, i.e. uncataloged materials on a specific topic, stored simply by subject. These are placed in hanging files in file cabinets.

The words selected for organizing these files are *subject headings*. These subject headings must not be selected willy-nilly but should be chosen from a *controlled vocabulary*. The creation of new folders with new subject headings can be executed as the need arises. A new folder is only created when one is certain that there is not already an appropriate folder in the file. The controlled vocabulary for the subject file can be selected from one of the *thesauri* described in *Appendix A*. These headings become the “guide” or “map” of the

file. The *subject file* can be made accessible to users as well as staff.

Setting Up Subject Files. The initial steps are relatively straight-forward.

- * Select the subject headings to use.
- * Create an *authority file* of the subject headings with index cards or on a computer.
- * Use one hanging folder for each subject heading.
- * Type the heading on the folder label.
- * Place the folders in a file cabinet in alphabetical order.

When materials coming to the center are to be stored in the subject file, processing them is relatively easy.

- * Stamp the item with the name of the center. Put this on the cover page.
- * Assign a subject heading considering the kinds of questions the document might be used to answer. If a new subject is selected create cards for the authority file.
- * Write the selected subject on the upper left corner of the front page. This is important to assure that the document is returned to its proper place after it is used.
- * Place the document in the appropriate hanging folder.
- * Do not assign an accession number (accession numbers are not used for items stored in the subject files because they are expected to have only temporary value).

There is one situation that makes this a bit more complicated. That is when a document covers more than one subject. Thus, it could easily be placed under several subject headings. Even if extra copies are available it is unwise to place the full document in more than one file because space soon becomes a concern in any library/information collection. Rather, choose one of the several possible subject headings and place the document in *that* file.

To allow finding the item when browsing other files, there are two options. The first is to make a note for the other files. For each additional subject heading, instead of the article itself, place a cross reference sheet in the file. Write the subject heading at the top, list the other documents of interest citing author, title, and subject heading under which the document is filed. Another alternative is to photocopy only the first page of the document and write the subject heading of the secondary or additional subject in an upper corner. This assures that the single page note will always be re-filed correctly. Write the subject heading the full document is filed under on the bottom of the page.

Selecting Subject Headings. In selecting subject headings, many of the same issues arise as in selecting descriptors for documents which are cataloged. Again, it is important to avoid *similar subjects* and synonyms. When choosing subject headings avoid creating two different files for documents about the same topic. Often, there is more than one word that can be used for a subject.

For example, one can use *elderly* or *aged*; *youth* or *adolescents*. It doesn't really matter which of these is selected – what is important is that you don't use both. If both are used, documents on the same subject will be filed in two different places, making it difficult to locate all the of them later.

The words used for subject headings should be chosen by one person such as the director, or by someone who knows the file well and fully appreciates the problems which arise if subject terms are selected randomly.

Authority File. The authority file is a system that is used to keep track of the choices a center makes when it selects subject terms. It is important to have a record of which subject headings the center decides to use and which subject headings the center decides not to use. A card or computer entry in the authority file is made for the subject words not chosen as well as for the ones that are. For each of the words not being used, the authority file directs users to the word that has been adopted for that subject instead. For example:

elderly *SEE* AGED

This means that documents about the “elderly” are found in the subject file titled “aged.”

Since the number of topics that might be developed is virtually limitless, broader categories are often used to include more specialized information as well. This too is noted in the authority file. For example, if a user looks for the subject *driving accidents* a card might be found that says:

driving accidents *SEE* ACCIDENTS.

This means that information about the subject “driving accidents” is filed under the broader topic “ACCIDENTS”.

The authority file also includes references to other subjects that are used in the file that may have relevant information.

WOMEN
SEE ALSO
FETAL ALCOHOL SYNDROME

This means that additional information about WOMEN may be found under the subject heading FETAL ALCOHOL SYNDROME.

Note. The convention used by librarians for making an Authority File of subject headings is to use CAPITAL LETTERS for the subject headings. Words *not* used as subject headings are typed in small letters.

If a word processing program that allows alphabetical sorting is used to

create the authority file, then printing an alphabetical master list of all subject headings becomes an easy task.

Organizing the Folders in the Subject Files. When alphabetizing the folders ignore all signs of punctuation, such as hyphens. Also ignore “the” when it is the first word. When subject files grow too large and finding things becomes difficult, then the files are broken down by the important sub-topics. In this case, when labeling the new files you will still want to have them grouped next to one another. This can be taken care of by retaining the general heading as the first part of the title for the folder. For example, the file “Cocaine” might be sub-divided as follows:

Example: Cocaine
Cocaine - Economic Aspects
Cocaine - Medical Effects
Cocaine - Use in Schools

The file which is labeled only “Cocaine” will include all the cocaine-related information that doesn’t fall into any of the special areas.

Subject Files for Organization. If a center keeps information about organizations that focus on addictions, it can incorporate this material in the subject file, filing it alphabetically by the organization name. Or, depending on the amount of information on organizations and the use of these materials, the other approach is to develop a separate file system of organizations. If more than one filing system is used, hanging folders of different colors should be chosen to simplify replacement in the proper drawer. Material kept in *organization* files might include: general pamphlets and articles about the organization, resource catalogs or annual reports. Do not include topical reports or articles published by the organization. Those will most likely be sought by *subject*, not by the organization that funded the report. On the other hand, a magazine or newspaper clipping about the organization *should* be filed under the organization’s name in the file.

Expanding and Revising Subject Headings. As noted above, subject files are always evolving. As files begin to bulge and categories begin to appear too broad, create new subject headings as appropriate.

For example, what started out as a file on “Alcohol Use,” might eventually need to be broken down into a set of more specific files such as:

Example: Alcohol Use - Adolescents
Alcohol Use - Elderly
Alcohol Use - Physicians
Alcohol Use - Nurses
etc.

Some subjects might be subdivided by geographical area, country, or region.

Example: Alcohol Legislation - Michigan

Create subheadings if a subject has a large amount of material in one folder. Folders should not become so large that one cannot quickly see what is available.

Maintaining Subject Files. Each time a new item is added to a subject folder, the other items should be scanned so that outdated materials are discarded. For example, only the most recent annual report and publications catalog should be retained unless the center has a policy of keeping older materials. It is not pleasant for a user to open a file of worn and torn pages interspersed with outdated clippings and reports. Weeding is just as important as regularly adding new material to the file.

The Alcohol and Other Drug Thesaurus - An Important Tool for the Center

When thinking about subject headings, *The Alcohol and Other Drug Thesaurus: A Guide to Concepts and Terminology in Substance Abuse and Addiction* can be a very useful aid. First published in 1993, the *Thesaurus* is becoming the standard for information specialists and others working in the field. Although the *Thesaurus* contains more than 10,000 descriptors and again as many lead-in terms (synonyms) on 570 pages with a 300 page alphabetical index and can appear overwhelming at first glance, those who spend some time browsing through it will be well rewarded and will have acquired a tool that provides a usable structure to what might have seemed to be chaos. Some creative ways of using it are presented below¹.

Keep in mind that you most likely will not need all 10,000 descriptors! It is not difficult to select *only* the terms appropriate to your center. If a word you wish to use is not found you can just add it to the structure. The *Thesaurus* is arranged in hierarchical fashion with the terms organized or arranged in successive levels, each level being a sub-division of the one above.

The following demonstrates the different levels or subdivisions:

<u>Level</u>	<u>Term</u>
1	. TREATMENT FACTORS
2	. . PATIENT TREATMENT FACTORS
3	. . . Patient compliance
3	. . . Patient mental stability
3	. . . Patient motivation
2	. . ENVIRONMENTAL TREATMENT FACTORS
1	. TREATMENT ISSUES
2	. . TREATMENT COMPLICATIONS
2	. . TREATMENT RISK-BENEFIT ANALYSIS
2	. . TREATMENT COST

¹Material adapted from a presentation by Dagobert Soergel, Ph.D. and Samantha Helfert, M.L.S. at *SALIS Annual Meeting*, San Francisco, CA on October 6, 1993.

1 . TREATMENT OUTCOME

If different age groupings are important in the center, for example, the *Thesaurus* already has a ready-made list (see box). From it you might select the age categories that fit the center's interests.

There are a number of advantages to using the *Thesaurus*, beyond just providing a list of terms. For one, the vocabulary is consistent. This means you are less likely to run into problems as files grow. Also the *Thesaurus* has "scope notes," for descriptors that might be ambiguous. "Scope" refers to the definition of a term – what it includes and does not include. Thus it defines the range or "scope of" the category. Also, the *Thesaurus* includes cross-references to narrower terms, broader terms, and to related descriptors and synonyms. In addition, there is a complete alphabetical index that even includes key words out of context to help you quickly find any word that might be in your head. Just about every category you need is here. You can find a section on body parts, occupations, religions, languages, geographic locations, and many other topics.

In addition to assisting in the selection of subject headings the *Thesaurus* provides a list of words that can be adopted by the center as descriptors for its own in-house database. If the center chooses to do this, contact the database manager at the National Clearinghouse for Alcohol and Drug Information for suggestions on how best to go about it.

The *Thesaurus* can also be helpful when searching other databases. If one were to search for "youth" and not find the materials hoped for, one could look up "youth" in the alphabetical index of the *Thesaurus* and find other words that can be used to mean the same thing — "adolescent," "junior high school student," or "high school student" for example. Similarly it suggests other ways to find materials about "nicotine." Ask for "cigarette," "cigar," or "smoking."

It might also be used to prepare multiple-choice forms when compiling a directory of treatment organizations. It allows you to quickly select ages served, kinds of services, special populations, types of drugs, treatment methods, sponsors, etc.

Most database software allows searching with *Boolean operators* (AND, OR, NOT) meaning that two or more descriptors can be combined in a search. AND means a record must have *both* search terms in it, OR means it can have *either* term, and NOT means it *cannot* have the specified term. This is one of the important reasons that the use of descriptors in databases improves searching capability so much.

With the *Thesaurus* in hand, your own creativity is the only limit to the ways it can be used to help organize the information in your center. Do invest the

time and ask your colleagues in the field or at NCADI how *they* are using it.

Tip: Use only those subject headings useful to your center. Even if using a list developed by others, or descriptors from a *Thesaurus*, alter subject headings to reflect the nature of *your* collection and to conform to local use.

Designing a Circulation System

Purpose. If materials in a collection can be borrowed by users, then the center is said to have a circulating collection. A system must be adopted to track all materials on loan. If a book is missing from the shelf, it is useful to be able to know if it has been borrowed and when it will be returned, or if a book is lost or misplaced. The center's circulation system should provide this information.

A circulation system needs to be able to handle the following tasks:

- * identify borrower(s)
- * identify materials borrowed
- * record due dates
- * identify over-due materials

Beyond knowing who has what materials so that they can be retrieved if not returned when due, data in the circulation system has other important uses. It helps a center determine some characteristics of its clientele. The data can identify the major borrowers and may allow the center to profile the kinds of materials and topics of particular interest to users. The center can track the demand for materials in specific subject areas. This information can offer direction to the center in selecting the materials it collects and wishes to have readily available for users.

The confidentiality of *individual* users must be securely protected. There are very important ethical considerations in terms of user confidentiality which must always be honored. Specifically, who borrows what kind of information from a library is *always* considered confidential information. A bit of thought about this makes it apparent why this is the case. Clearly, an individual's use of a library reflects not only professional interests but also can reflect personal and private concerns and issues.

Policy. Beyond having a system in place to allow the checking out of books or other materials, the center needs to have a clear policy as to whom such privileges can be extended. Who may borrow what kinds of materials? What is the length of time for which materials may be borrowed? Is it important to make distinctions between different types of users as to what they can borrow and for what length of time? A circulation policy may include specific borrowing privileges for different groups of users, different loan periods for dif-

ferent types of materials, and different over-due fine schedules for different groups of users and materials.

Circulating materials are easy to retrieve within an office where people and the documents they borrow can be quickly located. Documents loaned to people who cannot be easily located can be time-consuming or impossible to retrieve. A well-organized circulation record facilitates the pursuit of overdue materials.

To ensure that the services provided by an information center are consistent with its mandate, circulation policies are often established with attention to several factors. One factor is the needs of primary clients, another is the importance of a book as a part of the basic reference collection. Finally, policies need to take into account the level of demand for an item. Therefore, in recognition of differing client needs, a policy may be adopted which affords agency staff members priority borrowing privileges for certain materials. There are also some materials that should never leave the center. These would include materials used frequently for responding to reference questions and those that are hard to replace and/or expensive such as special reports or multi-media kits. The level of demand for certain items may also be taken into account. In that case, for example, a policy might be written that states that the most recent issue of a periodical will not circulate.

Types of Systems. A *manual circulation system* is the least complicated in terms of organization and equipment needed. It only requires a book pocket, book card, and date due slip, similar to the system many of us remember from our own school library days. To assist borrowers, the due date should be clearly stamped and attached to the item. The book pocket and date due slip are often secured to the inside of the front cover of the book. File the book cards alphabetically by author or title, or file them in order by call number. Filing book cards in order of date due makes finding a specific book card very difficult.

An alternative to the manual system is a *computer-based circulation system*. Computer-based systems, in terms of the technology, are not dissimilar to the systems many of us have become familiar with in grocery stores. In a store, a machine reads a bar code, which identifies the item being purchased and its price. In a library, the electronically readable "bar code" on materials to be borrowed, as well as on borrowers' library cards, identifies which books are checked out and by whom. These automated systems offer features that go beyond what would be part of a manual method. For example, the computer system can be programmed, to provide the following:

- * a client file with full information on patrons, their check-out records, overdue materials, and reserves.
- * delinquent borrowers who have overdue materials or owe fines.
- * the ability to search by author, title, borrower's name, or due date.
- * ready-to-mail overdue notices.

- * statistical information concerning collection use and circulation activities.

Whether one adopts a manual circulation system or a computer-based system depends on a number of factors. Some of the questions that need to be considered are the size of the collection, the number of books on loan at any given time, and the funds available. While a computer system may be a definite asset, it is wise to remember it may not be cost-effective for a given collection.

Resources

The Librarian's Yellow Pages .

Larchmont NY: Garance, Inc. 1995 250 pp. Free.

Phone: 800/235-9723

E-mail: database.carl.org@internet

An annual publication that lists thousands of publications, products, and services for libraries and information centers. Each entry includes name, address, phone, fax, descriptive information and a topical category for the service provider. The 1995 print edition contained more than 200 pages of ads for products used by libraries. It is also available on the Internet where it is updated monthly.

Sources of Library Supplies and Equipment

See the list of suppliers at the end of *Section 2*.

Subscription Services

Dawson Subscription Service

1001 West Pines Road

Oregon, IL 61061-9570

Phone: 800/852-7404; 815/732 9001

Fax: 815/732-2123

EBSCO,

P.O. Box 1943, Birmingham, AL 35201.

Phone: 205/991-6600.

Fax: 205/995-1636.

Suggested Reading

Addresses for organizations listed as publishers can be found in *Appendix A*.

Cataloging

Gorman M. *The Concise AACR2, 1988 Revision*. Chicago, IL :

American Library Association, 1989. 161 pp. \$20 (Members \$18). ISBN 0 8389 3362 9.

Easy to understand for libraries using only the first very basic level of description. Especially useful for anyone doing cataloging for a small, specific collection.

Palmer J. *Cataloging and the Small Special Library*. Washington, D.C. : Special Libraries Association, 1992. 49 p. \$28 (Members \$22.50) ISBN 0 87111 370 8.

Based on a survey of cataloging trends in randomly selected special libraries. Provides a basic overview of common cataloging approaches and their difficulties, as well as software and online catalogs most often used.

Marin Institute. *Marin Institute Thesaurus*.. San Rafeal, CA : Marin Institute, 1995. \$50. ASCII version must be ordered with print version \$10.

More than 1000 alcohol, tobacco and other drug descriptors for prevention materials from the social sciences, business and health fields.. Arranged alphabetically with scope notes. "Rotated" and hierarchical lists and a list of vertical file headings are also included.

U.S. Department of Health and Human Services. *The Alcohol and Other Drug Thesaurus: A Guide to Concepts and Terminology in Substance Abuse and Addiction. Part 1: Hierarchical List; Part 2: Alphabetical Index*. Second Edition. 1995. \$25.

Developed jointly by the NIAAA, CSAP, NIH, SAMHSA. Loose leaf notebook format. Available from the National Clearinghouse on Alcohol and Drug Abuse (NCADI). Systematizes the language of the many scientific and scholarly disciplines relating to research on alcohol and other drugs and the prevention and treatment of problems associated with their use. A subset of the *Thesaurus* serves as the controlled vocabulary for ETOH the database produced by NIAAA and for information systems at NCADI.

Canadian Subject Headings. Third Edition. Ottawa, ON : National Library of Canada, 1992. 550 pp. Semiannual supplements. ISBN 0 660 57311 2. Can \$22+shipping and handling. Can \$26.40 foreign. Available from: Canada Communication Group, 45 Sacre-Coeur Blvd., Hull, PQ K1A 0S9, Canada. PHONE 613/956-4800; FAX 613/994-1498.

Provides in-depth coverage of Canadian topics. Emphasizes general compatibility with Library of Congress Subject Headings.

Repertoire de vedettes-matiere. Tenth Edition. Quebec, PQ : Bibliotheque de l'Universite Laval in collaboration with the National Library of Canada, 1988. ISSN 0705 5455. Microfiche only. Subscription: Can \$150 2/year updates; Can \$100 1/year update. Available from: Repertoire de vendettas-metiere, Bibliotheque, Pavillon Bonenfant, Universite Laval, Quebec (Quebec), G1K 7P4, Canada.

An amalgamation of two major subject analysis systems — Library of Congress Subject Headings and Canadian Subject Headings. Translated into French.

Purchasing Books, Serials and Equipment

Basch NB; McQueen J. *Buying Serials: A How-To-Do-It Manual for Librarians. How-To-Do-It Manuals for Libraries. Number 10*. New York : Neal-Schuman Publishers, Inc., 1990. 198 pp. \$39.95. ISBN 1 55570 058 6.

Includes detailed descriptions of jobbers, subscription service companies.

Eaglen A. *Buying Books: A How-To-Do-It Manual for Librarians. How-To-Do-It Manuals for Libraries. Number 4*. New York : Neal-Schuman Publish-

ers, Inc., 1989. 166 pp. \$39.95. ISBN 1 55570 013 6.
Glossary and annotated bibliography.

Hirshon A; Winters BA. *Managing the Purchasing Process: A How-To-Do-It Manual for Librarians*. New York : Neal-Schuman Publishers, Inc., 1993. 150 pp. \$39.95. ISBN 1 55570 081 0.

The Librarian's Yellow Pages . Annual. Larchmont NY. Free. Phone: 800/235-9723.

The 1994 edition contained more than 200 pages of advertisements for products used by libraries.

Miller HS. *Managing Acquisitions and Vendor Relations: A How-To-Do-It Manual for Librarians*. New York : Neal-Schuman Publishers, Inc., 1992. 196 pp. \$39.95. ISBN 1 55570 111 6. \$35.

Robinson JS. *Tapping the Government Grapevine: The User-Friendly Guide to U.S. Government Information Sources, 2nd ed.* Phoenix, AZ : Oryx Press, 1993. 240 pp. \$39.95. ISBN 0 89774 712 7. Phone: 800/279-6779.

Section 4.

Computers, Telecommunication and the Internet

The Computer: A Management Tool

In many ways, today's libraries bear little resemblance to those places that many of us remember from our childhood, where we discovered *The Little House on the Prairie* or the *Hardy Boys* mysteries, or where we found materials for school papers. There are a host of new technologies that have already revolutionized and continue to change the ways libraries and information centers function. Most of these changes are based upon some kind of computer application.

Computerized systems are today commonly used to develop and manage library collections. By way of example:

- * When the mail is delivered with new issues of newsletters and journals, they are checked-in on the computerized database.
- * New books become a part of the database when they are ordered and their status is updated on arrival.
- * The librarian verifies new book information on the in-house database, perhaps with assistance from an on-line library catalog at a distant site. A classification number and subjects are assigned. The book record then becomes a part of the center's computerized catalog.
- * A book is processed with labels and library stamps and is then ready for circulation managed by the library's computerized circulation system.
- * To respond to user requests the librarian again turns to the computer to search the database.
- * Overdue notices are produced by the computer along with a list of those to whom they should go.

It could be said that the very heart of many information centers today is in their computer system.

Selecting a Computer System

Developing a computer system or an in-house database is not a project to be undertaken lightly. There are a number of points to consider. First, find out if there is an existing computer system within the host organization that might be linked to, or at least relate to, the proposed computer for the center.

Next, consider the following steps:

1. Define the range of information that will be entered and how it will be used.

- * Identify a computer capable of handling the data.
- * Select a software program that will handle the needed functions. Will the center use relational databases to allow a title to be typed in when identified and then transferred from an order file, to a processing file, to the center's catalog and possibly its circulation system?
- * Identify users of the database who may include the staff for daily maintenance of technical records and information retrieval, and clients for information retrieval in the center, in the organization, or from their homes.
- * Create or adapt a list of descriptors (controlled vocabulary) to describe the materials.
- * Establish procedures and conventions for entering information into the database.
- * Prepare a written procedural manual to help ensure consistency in entries completed by more than one person.

2. Consult colleagues and consider hiring a consultant.

After defining as precisely as possible what the system ought to be able to do, the director should again talk to colleagues and any computer specialists in the host organization. Unless one's organization includes a person who is experienced in creating databases, the center should consider securing outside expert consultation. The consultant can assist in selecting appropriate hardware and software as well as help build in various "safeguards." and oversee the system startup. Although the director will depend upon a consultant, it is important that s/he understand as much as possible about what the proposed system *will* be able to do and what it will *not* be able to do. Continue the process of talking, reading and refining the requirements for the system until it appears to meet the center's needs.

The consultant should be a person who has had directly relevant experience in planning and developing library systems. S/he should be familiar with library information applications and with running networked microcomputers. The center should plan to work together with the consultant to determine the exact goals of the system and resolve problems. Good communications between the consultant and the center staff are important.

3. Research and select a system.

There are many different computer software programs for library applications. Software can be purchased in “stand-alone” modules ready for immediate use known as “turn-key” systems. The modules can manage circulation, acquisitions or cataloging. A preferable choice is to select software that integrates the entire library system. Integrated software creates what are known as relational databases. This means that once information is typed in about a book on order, the same information will not ever have to be typed in a second time. These integrated systems are able to handle a number of very different tasks. The system accepts information when a book is first ordered, then accepts cataloging and classification information, creates a “shelf list” record and later keeps track of loans and materials overdue. The status of a given item can be identified, whether it is on order, in the collection or out on loan. In addition, searches by author, title, subject, etc. are possible. In effect these systems create a number of inter-related databases which serve multiple purposes. Several examples of computer software for library management are noted at the end of this section.

Before purchase, make arrangements to try the system being considered. Sit down at the keyboard and try entering a few records. Then try searching them. Ask about the availability of start-up and continuing technical support. Don't make any assumptions.

***Setting-Up Procedures
and Conventions***

Having selected a system, the next step is to establish procedures and conventions for entering information into the database(s). Once again, one is well advised to turn to the consultant. In addition, visit a center that has created a database and talk to the director, this time focusing upon the procedures adopted, and the problems encountered.

The importance of developing procedures and conventions is second only to that of choosing an appropriate system and software, and cannot be over-emphasized. For information to be retrievable it must be entered in a *uniform* and *standard* fashion. This is not the place for creativity and free spirits. For example, will full journal names or standardized journal abbreviations be used? Will dates which include a month and day be abbreviated and if so, using what format? For authors, will last name, full first name and middle initial be used or just last name and initials?

It is important to remember that the quality of the information that one can get *out* of the database is 100% dependent upon the quality of the information that is put in!

Figure 1. Sample Database Entry

<u>Name of Field</u>	<u>Kind of Information Entered</u>
Type of material	Book, Manuscript, Journal Article, Report, Film Audio-tape, etc.
Accession Number	A unique number for each item in the database. Usually includes digits for year accessed, e.g. "00559062599."
<u>For Books</u>	
ISBN #	International Standard Book Number, e.g. 0 8389 3362 9.
Author(s)	Surname followed by full given name of each author, e.g. "Marshall, John E."
Title	Full title, including subtitle
Edition	Edition number, e.g. "2 nd edition."
Publisher	Full name of publisher, e.g. "Neal-Shuman, Publishers, Inc."
Place published	City and state, e.g. "New York, NY."
Pages	Number of pages, e.g. "386."
Date	Year of publication, e.g. "1995."
Descriptors	Selected from a controlled vocabulary of subjects, e.g. alcohol, cocaine, adolescents, prevention, etc.
Classification number	A number assigned by the center to identify the exact location where an item is kept.
Notes	Any additional information

Figure 1 is an example of a very basic database entry for a book. Many databases include much more information such as cost, source, and status — for example: on order, awaiting processing, or completed. This accommodates the technical needs of the center in addition to meeting the searching needs of

the clients and staff.

Similarly, proofreading and verification of information that has been entered into a database is vital. A misspelled author name, an incorrect location, or an inaccurate title may mean that even though the item is physically in the center it cannot be located and is essentially lost.

Beyond adopting rules for entry of data into the records there are a number of other parallel procedures which need attention. How will you know what items have been entered? Something very simple like penciling a check and date on the inside of the front cover might be used to designate this.

The value of a database for retrieving information may be directly related to the skill with which the descriptors were selected. Users depend upon the descriptors to give them complete searches of topics that may be described by a number of synonyms in everyday language. The novice will want guidance in setting up the database so that staff and users can quickly and easily find information in many different ways.

***Public Databases vs.
In-House Databases***

Another issue to think about when developing a computerized database is how much information is enough. Just because something *can* be done, does not mean that it *ought to be* done. For example, the center may think that it “ought” to include in its database each individual article in every journal to which it subscribes. If each journal issue contains 20 articles, the amount of time required for entry increases rapidly. Furthermore, the center may be able to search *public* databases more cost-effectively, rather than create and maintain its own database with that information.

If a center is able to access databases created by others, it can search those databases for articles published in the journals to which the center subscribes. This is a far more economical approach, in terms of time and money, than attempting to duplicate resources that already exist. It is an approach which still allows the center to search for journal articles in its collection so as to respond to specific queries and not be burdened with the expense of entering every article in each issue. The center can choose to run searches at regular intervals on frequently requested subjects. The searches can be downloaded in separate files and/or printed out for convenience.

There are occasions when it is unquestionably wise to create ones' own in-house database. Collecting information beyond books for professionals about alcohol and drug abuse may be one. There are currently a number of databases in the social sciences, medicine, law and elsewhere that contain alcohol and other drug information. Their scopes vary and may not meet the needs of a particular center. If the center finds itself regularly turning to *multiple* public databases for needed information, then it may be useful and cost-effective to create an in-house database. This is most likely to occur when an information

center is asked to obtain information from more than one discipline or to collect information originating from non-standard sources. The center can download or create selected citations for documents in the center and assign selected descriptors to develop an in-house database. A discussion of publicly available databases is presented in *Appendix E*.

Telecommunications

Fax, e-mail, on-line searching, CD-ROMs, discussion groups... All of these are relatively new arrivals on the scene and represent new ways of communicating between sites that are physically separate. In brief, telecommunications and the use of computers allow people both to be in contact *and* to transfer information easily from one site to another. As a result, the library/information center is no longer limited primarily to the materials located within its own walls. It can search catalogs and databases in remote places and download full-text copies of documents from distant machines. Literally, with the arrival of the computer, materials and information world-wide are a potential part of any library.

Cost-Effective Use

With this new access comes the problem of deciding how an information center can use these communications options in a cost-effective manner. In the same way that the pros and cons of an extensive in-house database must be considered, the different ways in which electronic communications can be utilized should be assessed. Will access be limited to staff in order to simplify their work? Or, will the staff offer extensive on-line searches to clients? The center must carefully weigh the full costs of providing on-line search services. The money spent to purchase hardware for on-line database searching and network communications is, in fact, a very small part of the investment that will be required. The training and expenditure of human resources can be costly. Things to think about:

- * Databases of alcohol and drug information available through commercial vendors and large research libraries.
- * Databases of medical, social science and other information available through commercial vendors and large research libraries.
- * Databases on the Internet.
- * Documents that can be downloaded from the Internet.
- * Bulletin boards and mailing lists on the Internet.

The other side of the coin is considering the resources required to use these:

- * Who will conduct the on-line searches?
- * Does that person have previous experience and training?
- * How much time will this person be able to allocate to database searching?
- * Which groups of patrons will be offered this service either without charge or for a fee?
- * To which databases will the information center wish to gain access?

- * To what extent will the information center use publicly available data bases through Internet service providers or large research libraries?

Fast access to comprehensive information sources can make the investment of time and staff in on-line database searching very cost-effective. A trained searcher may find in minutes a set of facts, figures, and bibliographic information that would manually take days or weeks to retrieve — if they could be retrieved at all!

However, the untrained searcher can spend hours or days lost on-line. S/he may eventually identify some relevant information but not in a cost-effective way. Or worse, the untrained searcher may mistakenly conclude that the needed information is not available at all.

The Internet Link

As this *Guide* has been compiled, the Internet has been evolving virtually daily. What was previously viewed as a source of additional information and communications for *some* information centers, is clearly becoming a basic tool of the trade. It will be a necessity for *all* information centers of the 21st century. Not having Internet access will be similar to abandoning the telephone, the photocopy machine, and the postal system.

What is the Internet?

The Internet is a worldwide network of more than 30,000 computer networks that connects more than a million-and-a-half computers of every kind — from super-computers and main frames to the personal computer on your desk. More than 25 million people from over 143 countries now use the Internet. The number of users has reportedly doubled each year for the past few years. The U.S. is still the largest user but international connections are increasing rapidly.

The Internet is truly a network of networks. Two of the many networks that make up the Internet are names which you may see, these are Usenet and Bitnet. Usenet is a network of more than 5000 news groups on which one can partake in fast-moving discussions on as many different topics. Bitnet is a small network comprised of academic and research institutions.

The Internet began in 1969 as a U.S. Defense Department network to link researchers from different sites. In the late 1980s, it was merged with the National Science Foundation network. In late 1994, the NSF Network took the first in a series of steps that would discontinue its support of the Internet within four years. The Internet instead became supported by a joint effort of MCI, Sprintlink, and other telecommunications companies. Government and educational usage continues, but it is already carried out on a system operated by commercial enterprises. The network continues to grow as it becomes increasingly commercialized, but one cannot guess what changes will take

place in the future.

Legislation in 1991 created the National Research and Education Network (NREN) which now oversees the Internet. Additional legislation is in process that will guide the Internet's development. The goal is to create a fiber optic cable network that will link computer users in government, industry, education, publishing, research facilities and libraries. This system has become known as the *National Information Highway* or *Information Superhighway*. Its projected effect on the world has been likened to the economic and sociocultural effects on America of the interstate highway system developed in the 1950's. Those who are already using the Internet regard it's effect on society as not very different from the arrival of the telephone.

A metaphor

For those to whom telecommunications is unfamiliar and a bit daunting, some introductory comments may be helpful. A comparison to telephone communications can be a useful metaphor.

In order to phone someone, both of you need to have telephones, the physical devices. In addition, you both must be connected to a telephone company, over whose lines your voice signal travels. The particular telephone company doesn't matter because the companies have developed systems that connect them all.

With telecommunications, your computer and modem are the counterpart to your telephone which allows you to send and receive messages, or to have access to information on computers at a distant location. The software that is used assures that the computers "speak the same language."

Forms of Telecommunications

There are a variety of different forms of electronic communication – e-mail, electronic discussion groups and bulletin boards, file (document) transfer, and database searching.

E-mail.

This stands for electronic mail. E-mail allows one to send an electronic message or query to a friend or expert. Most of the information centers connected to the Internet have e-mail address to facilitate communications with colleagues. With e-mail, a very small center can keep in touch with the library down the street or with an information center half-way around the world. E-mail combines the accuracy of written mail and the speed of the telephone. Many organizations such as the Special Libraries Association and the staff at the National Clearinghouse for Alcohol and Drug Information use e-mail too.

Listserv.

A listserv is a mailing list on the Internet used by a group of people with similar interests. Anyone can subscribe to a listserv by sending a "subscribe"

Section 4. Computers, Telecommunications, and the Internet

command to the its address. Subsequently any communication sent to the list address is copied and sent to every member of the list. Members can choose to reply to the message and lively discussions can ensue.

Library Catalogs.

The search for information has become infinitely faster and easier as research libraries have made their on-line catalogs available on the Internet. It is possible to search the catalogs of the Library of Congress, the University of Oxford, England, and the New York Public Library within minutes and without moving from the comfort of one's own PC. Beyond that, when searching, there's no need to take notes. The search results can be saved and printed in one document upon completion.

Databases.

This feature allows users to search off-site databases for bibliographic, directory, statistical, or just about any kind of information. As all information professionals know, often the most valuable information appears in journal articles or reports which may not be included in library catalogs. On-line databases have become a primary source of identifying the journal literature.

Bulletin Boards.

These are the devices by which users can post questions and comments. Bulletin boards can be used to get answers to seemingly unanswerable questions from experts about whom you had never heard.

File Transfer.

This feature allows users to download documents and other files from any computer that chooses to make materials available. Software can also be downloaded.

Using Telecommunications

There are three ways in which the use of the Internet can be helpful to an information center. These are briefly described below.

1. Communicating with others.

For many of those who are on the Internet, e-mail has become an important part of their work day. They send much of their "mail" over the net and may receive responses within minutes. E-mail is used by many libraries to request interlibrary loan materials, to identify document sources and locate extra copies of missing periodical issues. E-mail makes it easy to keep in touch with professional colleagues and associations, businesses, and personal friends. It also provides free, non-interactive access to electronic discussion groups and electronic journals.

2. Using computers at other locations.

It is now possible to actually use a computer at an off-site location, in the same way as if you were physically sitting there. This is termed "remote access."

Section 4. Computers, Telecommunications, and the Internet

Telnet is special software used on the Internet that allows one to use a computer at a distant location. Telnet can be used by those *directly* connected to the Internet, but not by those connected through Bitnet or Usenet. Telnet provides interactive access to distant resources that range from on-line library catalogs and databases, which often contain the full text of many documents, to indices of the periodical literature as well as campus and freenet bulletin board systems.

3. Obtaining materials.

FTP, File Transfer Protocol, allows those with a direct Internet connection to copy information that a host computer chooses to make available to others. The information may be bibliographic citations, the text of an entire manuscript or book, images, graphs, tables, or software.

Navigating the “On-Ramp”

If you are just embarking upon the information super-highway, there are several suggestions for the “new driver.” Inasmuch as one has to choose an on-ramp, it is strongly recommended that you choose PREVline, a network that provides ready access to the new telecommunications methods to everyone with an interest in alcohol, tobacco and other drug abuse. Compared to many systems it is very straight-forward. Or, in computer jargon, it is “user friendly.”

PREVline is specifically directed to alcohol, tobacco, and other drug information. Also, it is free and available to the public. For many, it may offer the most immediate and easy access to basic on-line technical features.

After mastering *PREVline*, you will have a bolus of experience to use as you venture out in other directions.

Tips.

If this represents new terrain don't forget there are some other things worth considering. Be sensitive to your own learning style and your level of interest and comfort in approaching new technologies. Take this into account as you learn to use these new communications tools. An example of the importance of this involves the use of VCRs. For some, programming them to automatically record a favorite show is a snap. For others, it's an insurmountable challenge, that has to be left to an expert, even if the expert is one's eight year-old child! Or, there is the middle ground – “I can do it if I *have* to.”

Depending on your own predilections and expertise, finding someone to set up a simple system and train you and staff to use it may be a very sensible and cost-saving approach.

Changes are occurring at such a rapid pace that even for those who are relatively sophisticated, keeping current on new developments, products, and sources of information is a full-time job. The editor of the *Personal Computer* column in the *New York Times* shared his own solution to gaining access to

specialized resources and assistance. He enrolls in one course at a community college each term in order to take advantage of the services provided to students. He gains Internet access. He gains access to the community college consultants who respond to students' questions and help them resolve any problems encountered. He is eligible to enroll in mini-course offerings which provide training. Plus, he receives the array of notices and announcements of new software and hardware new on-line databases and discussion groups which are announced daily on the Internet.

PREVline

PREVline was developed by the center for Substance Abuse Prevention (CSAP). The acronym stands for Prevention On-line. PREVline's basic services are available to everyone. In addition, those who are RADAR Associates or CSAP grantees are offered full access to the Internet.

PREVline can be accessed, using a computer and modem, by dialing a phone number for a direct connection to the CSAP host computer. A second way to access this system is to connect your computer to a host computer in a institution (university or government agency) that is a part of the Internet network. CSAP has made PREVline available through the Internet network. This is one example of the thousands of linkages that constitute the Internet.

The Internet, a web of connections between computers world-wide, is what makes this entire enterprise possible. To return to the telephone analogy, the Internet is equivalent to all of the phone companies in the world and their series of interconnections that allow telephone calls to go from one system to another. Beyond your own personal computer, there is a need to connect to a larger computer which is already a part of the Internet. Many who work in academic institutions or commercial organizations will find that their organization already has an Internet connection. Ask to have your computer connected. Private individuals, or groups within organizations that do not have such connections in place, can gain access to the Internet through a commercial company, which offers this access for a membership fee, or through other focused networks such as PREVline.

Traveling the Super-Highway, via PREVline

Returning to the different forms of telecommunications that can be found on the Internet, let's look at how these are actually used, and how access to these different types of communication can be gained through PREVline.

E-mail.

This is simply a means of sending an electronic message to someone. Just as you require a telephone number, unique to a particular home or office, so you will need an e-mail address to send electronic messages.

There is a set format for telephone numbers: area code, followed by the three

Section 4. Computers, Telecommunications, and the Internet

numbers that represent a particular town, followed by the unique four digits for the individual. As such, there is also a set format for e-mail addresses. Although the format varies on different networks, on the Internet, the largest network, the format follows this pattern: the individual's name followed by an @ symbol, then the name of the host computer followed by a period (.) and a three letter abbreviation which identifies the location of that computer as an academic institution (edu), governmental location (gov), or commercial group (com). There are no spaces in the addresses

PREVline provides registered users with a mail box from which they can send and receive messages.

For example, the address for a university librarian might be

Jane.Doe@Dartmouth.edu

name computer type of organization

Unfortunately there is no definitive "directory assistance" available on the Internet. You may need to use the old-fashioned telephone to ask an individual for his/her e-mail address. If you are a member of an established network such as PREVline, you can likely find a directory of the persons who are members and their e-mail addresses. In addition, many Internet search engines now feature "people search" systems that can help you locate the addresses of some people and organizations.

Many businesses, libraries, and information centers now include an e-mail address on letterhead and business cards, right along with their telephone and fax numbers.

Bulletin Board Systems.

Electronic bulletin boards are today's electronic version of the old-fashioned cork-board where announcements could be posted. The electronic bulletin board basically assembles messages from users. It allows anyone who signs on to the bulletin board to read what has been posted and provides options for responding with a notice, announcement, or message of one's own.

Bulletin boards often serve as forums for questions and answers. An important distinction between the various types of bulletin boards is whether access is controlled or not. Those with controlled access are termed as being "moderated," meaning that someone takes responsibility for reviewing, culling, and sometimes actually posting the material. Unmoderated bulletin boards represent more of a "free-for-all" with anyone who signs on being able to place information on the bulletin board directly and no moderator to review or delete postings.

The PREVline bulletin board is unmoderated.

Discussion Groups.

These are the computer counter-part to a telephone "conference call." Multiple parties are on-line simultaneously as a part of the discussion group. One party serves as the "chair." Since everyone is at their own separate computer in their own individual location and the format is interactive, discussion groups tend to develop their own individual short-hand for communicating so that

brief phrases can be used to speed up the communication. For the new member, this can seem very foreign, and it may take a period of acclimatization before one can fully appreciate what is going on.

File Transfer.

File Transfer Protocol (FTP) refers to the process that allows one to make and secure a copy of a document or file which is on another computer. Thus, while similar to a fax, there are significant differences. Because one obtains an actual computer file, it is possible to load it onto one's own computer, just as if it had originated there. Thus, unlike a fax, one can manipulate the document, make changes in content or format, and then print it out on one's own printer.

PREVline does not offer discussion groups.

If a colleague has a bibliography that you would like to use with some modification, either the mail or a fax will get a copy to you. But once the information arrives, in order to change it, you would have to type it all into your computer. With FTP you receive a computer-based copy, which you can handle just as you would something that you created yourself.

E-mail can also be used to deliver computer-based copies of documents. However, one of the major advantages of FTP over e-mail is that when using FTP it may be possible to retain the formatting, lay-out, and features of the actual document. E-mail never captures these features – all you receive is the unformatted text.

In transferring files, keep in mind that the computer file is traveling from one computer over the Internet to another. Since different institutions have different types of computers some translation is sometimes required. Ideally, the computer software used to FTP materials takes care of that translation. Occasionally, however, incompatibility between systems may make it difficult or even impossible for a transferred file to be opened. When this occurs, you should contact the originator and see if they can reformat the document so your computer can read it. If not, it may be time to revert to some of the other methods for document delivery, such as e-mail or fax.

Keep in mind as well that most modern-day computer viruses are transmitted via files on the Internet. Never open a file you were not expecting, even if it appears to be from someone you know. Contact the sender first to make sure it is a legitimate file.

Database Searching.

Beyond file transfer between your computer and one at a distance, there is also the possibility to interactively search database files at distant sites. Thus, for example, anyone can search the on-line catalog of the Library Congress, the on-line catalogs of major libraries, or even search government databases in the same way one would if physically there. There is an ever-growing number of databases available for searching. Databases of alcohol and other drug information that are publicly available for direct on-line searching are included in

Appendix F.

Through the Internet, PREVline offers free access to several on-line databases to RADAR and Associate members as one of its menu of telecommunications services. Essentially what the managers of PREVline have done is to program into PREVline's computer the commands needed to access these other databases. Thus the PREVline user need only select a database and the PREVline system takes care of making the connection.

There are a few things to keep in mind when searching on-line databases. One of the most basic is that even though you are off-site and sitting at your own computer, in fact you are hooked up to another system. So, whatever rules and procedures govern the system that you are searching are the rules and procedures you must follow. However, because these databases are intended for broad use, most all of them have a series of "Help" commands that can be used to guide you through the database and its accepted procedures.

Equipment

The basic equipment required is a PC with a system and memory large enough to handle the software that will be required. The modem speed should be at least 14.4 bps, or bits per second, which refers to the speed with which information is transferred. This equipment need not be expensive. It may simply need to be newer than the older generation machine on your desk. The cost will be repaid in improved productivity and efficiency for the center very quickly. In a small center, the same machine can handle the center's technical processing activities.

More about the "On-Ramp"

Although it is possible to access PREVline without subscribing to a commercial network service, there are significant drawbacks to this arrangement. Although PREVline is a good place to start on the Internet, it does not offer full access to all the Internet resources. In addition, one must pay for a long-distance call, since you are contacting the distant computer directly via your telephone line and modem and PREVline does not offer a toll-free number. In the long-run, the center will want direct access to the Internet.

A center that is a part of an organization that already has a computer network in place is fortunate. Typically the network provides access not only to electronic communication, but to computer expertise. Experts within the organization worry about software packages and how they work, respond to questions, and often offer training to the new user.

Most academic and research institutions, as well as government offices and businesses, already have connections to the Internet. If your organization has a connection that is already established, only minimal costs will be incurred in extending the Internet connection to the information center.

**Internet Service
Providers**

If your organization does not already have access to the Internet, then you must “find” a host computer. Remember “host computers” are the gateways to the Internet. There are a number of commercial companies and organizations offering accounts to individuals to accomplish just this. They are called “*internet service providers*” or “ISPs.” Basically these are private companies that buy time on a very, very large computer from a regional networking organization and then agree to sell the service to you and me. These companies provide subscribers with software and a password that allows users to sign on to the system. Some of the better known groups are America On-line, CompuServe, and Delphi. Beyond the cost of making a connection to a host computer, access to the Internet is without charge.

It is important to think about telephone charges, however, because they can represent a large part of the cost of Internet use. Try to find a provider with a phone exchange that is a local call for you, free of per-minute phone charges. If that is not available, then compare the costs of providers with 800 number access to those with direct dial long distance charges. Consider that it is often cheaper to call long distance *interstate* than *intrastate* only a few miles away. Providers that use 800 numbers usually add a surcharge to cover the cost to them. This may, in fact, be more expensive than a long distance option.

Many of the books about the Internet included in the list of *Suggested Reading* at the end of this section include lists of network service resellers or public access providers. Keep in mind, however, that the list changes rapidly. The best way to obtain *current* list is via e-mail. To receive a copy ask a colleague to address a message to:

info.deli.server@netcom.com.

In the text of the message write the command:

send PDIAL

One example of a “network service reseller” used by libraries is Delphi. Delphi purchases *full* Internet network service and resells it to individual users at affordable prices. However, it’s interface is not especially “user friendly” in comparison to some other services.

Delphi

1030 Massachusetts Avenue, Cambridge MA 02138

Phone: 800/695-4005

Fees start at \$10/month for 4 hours connect time + \$4/hour for additional time.

Various arrangements are available.

It is possible to access Internet sources through popular and relatively inexpensive commercial network services such as CompuServe and America On-line. Call them for current information.

CompuServe
5000 Arlington center Blvd., Columbus OH 43220
Phone: 800/554-4079

America On-line, Inc.
8619 Westwood center Drive, Vienna, VA 22182-2285
Phone: 800/827-6364

Resources

Computer Software for Library Management

Plus for Libraries

Inmagic Inc., 2067 Massachusetts Ave., Cambridge, MA 02140
Phone: 800/229-8398; 617/661-8124. Fax: 617/661-6901.

Text management software package used by corporations, government offices and universities and by their Information centers and libraries. Handles non-traditional applications as well as the traditional ones - archives, technical reports, correspondence, annual reports, memos. SearchMAGIC offers a search-only version for on-line public access catalogs. The basic software and *Users' Manual* is about \$1250.

TLC: Total Library Computerization. Version 2

On Point, Inc. 2606 36th Street, N.W. Washington, D.C. 20007. Phone: 202/338-8914. Fax: 202/337-7107

Software to automate basic library functions in small to medium-sized libraries. Conceived and programmed by a librarian. Menu-driven system application of *AskSam*. Modules include acquisitions, cataloging, borrowing, interlibrary loan, serials control, and "memos". Version 2 creates intermodular programs to connect related records in separate integrated files. Intermodular searching with full text capability. Inexpensive - \$600/module; little training required. For IBM compatible PCs.

Library Works

CASPR, Inc. 635 Vaqueros Ave., Sunnyvale, CA 94086. Phone: 800/852-2777

A single, integrated program for cataloging, circulation, acquisitions, and serials management. All records are relationally joined to ensure that data is entered only once. Available for Macintosh and Windows. Handles images, sound video and documents for multimedia collections.

Suggested Reading

Automated Systems

Dewey P. *202 Software Packages to Use in Your Library: Descriptions, Evaluations and Practical Advice*. Chicago : American Library Association, 1992.

Duval BK; Main L. *Automated Library Systems: A Librarian's Guide and*

Section 4. Computers, Telecommunications, and the Internet

Teaching Manual. Westport CT : Meckler, 1992. \$35 soft cover. 273 pp. Appendices, glossary.

Useful to those new to the field of automated library systems as well as to those interested in upgrades.

Dykhuis R. *Template Directory for Libraries 1989-1990*. Westport, CT : Meckler, 1990.

Templates for Macintosh and MS-DOS computers.

The Internet

In 1994 *Books in Print* listed more than 215 books with *Internet* in the title. Because the Internet itself is changing so fast these books quickly become outdated. The list below is provided only as a starting point.

Beyond this list, request a copy of the annotated Internet bibliography that is continuously updated by a member of the Boston Chapter of the Special Libraries Association. It is in three parts, *Internet Bibliography*, *Internet Business Bibliography*, and *Titles Not Yet Published (or not yet reviewed)* .

To request: e-mail a request to: tillman@babson.edu. Ask for the *Internet Bibliography*. It will be sent to you by the author, Hope Tillman.

If you have a colleague with full access to the Internet you can get a copy by sending a gopher request:

`gopher://gopher.babson.edu:70/.intbib/`

Upon receipt of this message a document will automatically be forwarded.

Angell D; Heslop B. *The Elements of E-mail Style: Communicate Effectively via Electronic Mail*. Reading, MA : Addison-Wesley, 1994. 157pp. ISBN: 0 201 62709 4.

Benson AC. *The Complete Internet Companion for Librarians*. New York : Neal-Schuman Publishers, 1994. 500 pp. \$49.95. ISBN# 1 55570 178 7.

Written by a librarian for librarians, the volume describes the Internet, hardware and software needed and the tools used to navigate it. A section focuses on the librarian's role in a global network environment and the effect of the Internet on the kinds of services libraries can offer. A selected list of Internet resources and services useful to librarians is included.

Branscum D. "Swap tips around the world". *MacWorld* April 1993: 63-65. Explains to novices the "invisible web of computer connections that wraps the earth". Concise description and access instructions for Internet, Usenet, FidoNet

Carroll J; Broadhead R. *Canadian Internet Handbook. 1994 edition*. Scarborough, Ontario : Prentice Hall Canada, 1994. 415pp. ISBN 0133043959.

Especially for Canadian users.

Dern DP. *The Internet Guide for New Users*. New York : McGraw-Hill,

Section 4. Computers, Telecommunications, and the Internet

1994. 570pp. \$27.95 ISBN 0070165114.

Engle ME. *Internet Connections: A Librarian's Guide to Dial-Up Access and Use*. Chicago : American Library Association, 1993. ISBN 0 8389 7677 8.

Engst AC. *Internet Starter Kit: for Macintosh Everything you need to get on the Internet*. Second edition. Indianapolis, IN : Hayden Books, 1994. 990 pp. \$29.95. ISBN# 1 56830 111 1.

An excellent introduction and step-by-step instructions to the Internet. Includes extensive list of public access providers along with a disc of software with an automatic installer and two weeks trial connect time for full Internet access from one commercial access provider.

Engst AC. *Internet Starter Kit: for Windows Everything you need to get on the Internet*. Second edition. Indianapolis, IN : Hayden Books, 1994. 600 pp. \$29.95. ISBN# 1 56830 094 8.

An excellent introduction and step-by-step instructions to the Internet. Includes extensive list of public access providers along with a disc of software with an automatic installer and two weeks trial connect time for full Internet access from one commercial access provider.

Ladner S; Saryn J; Tillman HN. *The Internet and Special Librarians: Use, Training, and the Future*. Washington, D.C. : Special Libraries Association, 1993. 215 pp. \$33 (members \$26.50) ISBN 0-87111-413-5.

Based on a study of the Internet & special librarians. Analyses the impact of the Internet, how it is being used by special librarians and how it is changing the profession. Includes an Internet tutorial and a glossary of terms.

LaQuey T; Ryer JC. *Internet Companion: A Beginner's Guide to Global Networking*. 2nd edition. Reading, MA : Addison-Wesley, 1994. 196pp. \$12.95; ISBN# 0 201 40766 3.

Also available as *Internet Companion: Plus* with a disk. \$19.95

Levine J. *Internet for Dummies Starter Kit*. San Mateo, CA : IDG Books, 1994. \$34.99 includes disks. ISBN# 1 56884 237 6.

Good for "dummies" but excellent for more advanced users too.

Kehoe BP. *Zen and the Art of the Internet: A Beginner's Guide*. 3rd edition. Englewood Cliffs : Prentice-Hall, 1994. 193pp ISBN 0131214926.

The first edition of this book is still available on the Internet. This 3rd edition, available in published format, is still one of the most popular introductions to the mysteries that the Internet holds.

Krol E. *The Whole Internet: User's Guide & Catalog, 2nd edition* Sebastopol CA: O'Reilly & Assoc., 1994. 574pp. ISBN 1565920635.

This book has become a "bible" for many new Internet users. It contains a wealth of very practical information. Includes a lengthy list of public access providers.

Rosenfeld L; Janes J; Kolk MV (eds.). *The Internet Compendium-Subject Guides to Health and Science Resources*. New York : Neal-Schumann, 1994. 474 pp. \$75. ISBN# 1 55570 219 8.

Section 4. Computers, Telecommunications, and the Internet

Subject Guides to Social Sciences, Business and Law Resources. New York : Neal-Schumann, 1994. 472 pp. \$75. ISBN# 1 55570 220 1.

Created and collected by a team of subject specialists, librarians, graduate students and faculty from the University of Michigan Internet Clearinghouse, the volumes provide addresses to thousands of LISTSERVS, news groups, forums, electronic journals, databases and library catalogs. Fully indexed and annotated.

Tennant R; Ober J; Lipow AG. *Crossing the Internet Threshold: An Instructional Handbook, 2nd edition* Berkeley, CA : Library Solutions Press, 1994. 169pp. ISBN 1882208072.

Tillman HN; Ladner SJ. "Special librarians and the Internet." *Special Libraries* 1992; 83(2): 127-131.

Excellent, concise explanation of the many ways that the Internet is of major importance to anyone running an information service.

Core Services

There are a number of issues to be addressed when organizing a center's user services. In brief, these entail assembling the necessary tools, becoming familiar and skilled in their use, and devising efficient and easily followed systems to organize the center staff (one or many) so they can effectively respond to the needs of center users.

How to Serve Users

First and foremost an information center is a service organization. It's *raison d'être* is to provide information to end users. The center's business is to collect and disseminate information as well as to preserve it for future users. The tools the center uses to make information available are important, but they are only a means to an end. By far, the center's most important business is the dissemination of information. In the long run, the considered value of the center as well as its continued existence and funding will be based primarily upon its level of success in disseminating information.

With the arrival of computers in the center, the center not only has the ability to deliver traditional user services more efficiently and effectively, but it also has the opportunity to discover different and better ways of serving its clientele by using the new technology to its fullest potential. For example, the on-line catalog was a large step forward, but the fact that users can now use it from home, or from half-way around the world, has dramatically changed the ways in which we use libraries. Today, we can often "use" the library without actually going there. Likewise, the availability of videotapes has made it easier and less expensive for libraries to offer audiovisual materials. Centers today have the opportunity to discover new ways of using technology to better serve their users.

In fact, it is actually the staff within the center who determine how effectively the technology is used, as well as the level of service center users can obtain. The first requirement in serving users is to *want* to serve users – to view user service and care as the most important function of the center. If the staff adopt this attitude, then other issues almost automatically fall into place. To the center user, the initial response to a request, along with the way in which the request is handled and the ultimate results, form the basis upon which the center's service is measured.

Providing Reference Services

Basic Considerations. If the center's primary purpose is to provide information to users, then helping users find answers to questions is the most important service the center offers. This can be accomplished in several ways,

depending upon the needs of the user and the priorities of the center.

Technology has changed the ways in which librarians assist users. It has sparked new demands from some users for informal help in using the on-line public access catalog, guidance on searching “free” databases found on the Internet, or mediated searching of distant commercial databases. Users may also require help in using CD-ROMs and printed reference tools in the center as well as guidance in selecting appropriate organizations to contact. Technology has also led to the formation of higher expectations. For example, administrators of the host organization and other primary users may always expect the center to find an answer for them within hours, intensifying the librarian’s need to keep current with new materials, as well as the latest issues.

When responding to a specific request, it is important that the staff determine the kind of assistance that is required so that those who wish to learn how to use reference tools and locate information themselves have the opportunity, and those who just need answers on their desks within hours are accommodated as well. Responses to all users should include an explanation of how and where the answer was found to allow appropriate attribution as well as to increase users’ independence.

First the librarian must determine the question that is being asked, and, only then, can s/he decide where to look. S/he might start with a reference book on the shelves or in the index of the center’s on-line catalog. Is there an organization to contact? If an adequate answer cannot be found using the center’s resources, an on-line database search may be a good next step. Depending upon the decisions the center has made about on-line searching as discussed in *Section 3*, the librarian will use the center’s equipment to search or will contact a colleague to request the search. In either case the librarian must accurately match the information needs with appropriate databases. Even if the option of using another librarian to conduct the search has been chosen, the center’s librarian needs to be knowledgeable enough about the scope and sources of each on-line database to understand what is and is not being searched. The on-line search may result in identification of materials only available through interlibrary loan. If time is a factor, it is up to the ingenuity of the librarian to determine the fastest way to bring the client and the information together.

Quick Responses to Frequently Asked Questions. There will be some questions that are repeated regularly. Responses to these questions can be kept accessible in several ways. One solution is to record the question, a brief answer, the source of the answer and the date the question was asked in a notebook. Include questions for which no answer was found and record the sources searched. This will avoid duplication of effort. This information can also be stored on index cards or in a separate computer database. Both of the latter ways allow subject indexing for easy retrieval.

Format of Responses. In providing responses, it is important to tell the patron where the answer was found. Information that is considered to be *general knowledge* and cannot be attributed to any *one* source may be used without offering a source. However, ideas that originate with one particular source must always be appropriately attributed before distributing them. The librarian should *always* include a full bibliographic citation and leave the decision to the user as to whether or not that citation is useful for future needs.

Quality of Information. The center has a responsibility to provide the best available information to each user. An important qualification of center staff is their familiarity with sources in a subject area and with the authority given different sources by those working in the area. Sometimes there does not appear to be one absolute, definitive answer. In such cases, it is important that the all the information gleaned in the center be provided, along with the qualifications known to the staff.

If an information center chooses to provide only selected information on a subject, that may be acceptable as long as the user is clearly told there is more information on a topic available elsewhere. A good example might be a sponsoring agency's unwillingness to distribute information about treatment methods of which it does not approve.

Policies. The center's director needs to establish policies to identify the user group(s) who will be offered reference services and what level of service they will be offered. Levels of service can range from walk-in access without borrowing privileges to full reference services and document delivery for phone requests. Sometimes the staff require only a few minutes to locate an answer. On the other hand, the better part of a week might be required to identify and gather documents, as well as summarize the key findings in response to another request.

Conducting a Reference Interview

For most librarians, conducting a reference interview is an acquired skill – one acquired through both training and experience.

Preliminaries. A reference question should be presented directly to the person who will search for the information. It is important that the staff speak with the individual to find out what it is s/he *really* wants to know. Suffice it to say that what people say they want and what they *really* want may be quite different. At the most basic level, there are issues of terminology. Are you and the patron using words to mean the same thing? Reference questions should preferably not be left as phone messages. For convenience and economy, phone messages may be adequate if the center uses a special reference form which queries the user in detail about the question and requires a phone number for additional information if needed. In schools of library and information science, major focus is devoted to developing skills in conducting a reference interview. Users are often intimidated by the information center and not able

to adequately describe the information sought until set at ease by the librarian's tact, patience, and interest.

After the question has been presented, the librarian should rephrase and repeat it to clarify any misunderstanding. Next, ask some open-ended questions to encourage the client to narrow the scope of the question to the information which s/he is really seeking. Relax and pretend that time is not a priority. Do not try to hurry the client. A few minutes spent now might save many minutes later. Take time to think about the question. Be certain you understand the quantity and quality of information needed. If you are not certain, ask. If you are certain, confirm with a statement of your understanding. Is there a deadline beyond which the information will not be as valuable to the client? Think about which descriptors are used to express the concept in the databases (yours or others) that you search. Try a search with those descriptors and ask the client if any of the citations are relevant.

If the client is not available for an interactive interview, try to avoid sending irrelevant information. Select what appears to be the most relevant citation found and send it along with a note asking if it is "on the right track?" Most often the response will be "No!" followed by an explanation of why. The explanation elicited is often the most helpful in helping the librarian to identify exactly what information is being sought.

Circulating Collection

A circulating collection is a convenience service to users. Many librarians, if given the opportunity, would declare their collections to be non-circulating. There is an inherent conflict in allowing books to be removed from the center when one also expects to have full resources with which to respond to queries. However, the value of circulating collections is well recognized and it is possible to accommodate the user and the librarian too.

The loan period for different groups of users can be set with both the center and the user in mind. A large academic library may find it satisfactory to loan books to faculty for an entire year while a small special library may have difficulty loaning books even for a week. In selecting a loan period for a given group of users consider how important those users are to the center and whether the books can be quickly and easily recalled. If there are a few books that seem to be needed for reference in the center as well as on loan, consider purchasing a second copy to circulate. Some reference books can be allowed to circulate overnight to staff who work on-site. Basically any circulation policy that works for the users and for the staff should be tried. The success of a circulation policy, of course, is dependent upon the circulation system's ability to generate timely and accurate information to allow for the rapid location of a book that is not on the shelf.

Document Delivery

Document delivery service means the center provides personal copies

of requested materials to those who are off-site. The user need not come to the center. The document may be delivered by fax, mail, or courier. Most libraries that have interlibrary loan (ILL) agreements, in fact, fulfill requests for journal articles by sending a photocopy or fax, not the journal itself.

When an information center receives an ILL photocopy or fax it requested for a client, the center should consider retaining a copy of the document to process for the center's reprint file. When the same question is asked in the future, the request will then be easy to fulfill. In addition, this is an easy, cost-effective way of strengthening the center's collection in areas of interest to users.

Policy. The decision to provide document delivery raises a number of questions with staffing and budgetary implications. Will the center respond to phone requests as well as requests from "walk-ins?" Will the center limit the groups to which the service is provided with and without fees? Will the center limit the size of documents it is willing to duplicate?

Fair Use. Copyright law limits the number of copies that a center can make for users. However, each user may use the machine to make his/her own copy under the law. In general, an individual may make one copy of a document for scholarly (non-commercial) use. Permission must be obtained from the copyright holder if the individual or center wants to make more copies. Centers that routinely make numerous copies contract with the Copyright Clearinghouse (*Appendix A*) to arrange for payments.

Kinds of Documents. Multiple copies of many pamphlets can be obtained from federal agencies or clearinghouses for free or low-cost distribution. Journal articles and short reports can be photocopied multiple times with permission and appropriate payments (see *Legal Issues* below and *Appendix A – Organizations, Copyright Clearinghouse Center*). The information center can create its own handouts. Books that will be used often can be purchased to *give* (not lend) to users who are important to the center.

Mail and Fax Service. The center can send pamphlets and photocopies in response to mail, e-mail, fax, or phone requests. There may well be different policies for different groups, e.g. the general public versus agency staff, or professionals versus lay persons, or those within the targeted geographical area versus those at a distance. The access of users to other information centers may also be a reasonable consideration.

The level of service offered should be determined by the director according to the staff, equipment, and funding available as well as the needs of important users.

Fees. Another consideration is determining an appropriate fee schedule. Will the center charge for duplication, postage, and/or staff time? While every center needs to think about cost recovery, it is possible to lose money trying to

make money. It may well be more costly to charge than to provide materials free. This determination will be dependent upon the volume of requests, the cost of maintaining records, generating invoices, and billing. Many information centers offer one copy of each pamphlet free and charge for multiple copies.

Alternatives to Document Delivery. There are several alternative ways of providing materials to users. For one, the center may decide to develop a series of handouts incorporating frequently requested information. These may include pamphlets or photocopied articles and can be partially pre-packaged, with the final contents tailored to a specific request. The center may purchase copies of important reports and distribute them to targeted users.

Ethical Considerations

Charged with the task of drafting a code of ethics for Health Sciences Librarians, members of the Ethics Task Force of the Medical Library Association started out by describing their understanding of the nature of a code of ethics.

“It is important to consider the nature of what we mean by a code of ethics. Many of the difficulties we encounter with other codes of ethics is that they are not. Rather, they are an assortment of edicts and guidelines and random rules which often tend to be diluted by exceptions and qualifying phrases. They seem to lack commitment.

“A starting point for dealing with this involves the distinction between ethics and morality. Morality derives from the Latin word ‘moralis’ which means ‘custom.’ Anthropologists and sociologists use the word ‘mores’ which derives etymologically from the same Latin word. Morality and mores refer to the principles and guidelines posited by custom (society, its institutions, legal system, traditions, etc.) governing behavior. As we all know, mores (customs, morality) differ, not only from one society to another, but also from one social group to another within the same society.

“Ethics is often confused with morality, and the words are often used interchangeably. But, in fact, ethics means something a little different. Ethics derives etymologically from the Greek ‘ethikos.’ The word became the Latin ‘ethice’ and expressed a different concept from ‘moralis.’ Ethics involves the essential distinction between right and wrong, good and bad, virtuous behavior, etc. Ethics has to do with basic principles of duty, obligation, and responsibility. Ethics transcends morality; morality is a part of ethics, but they also sometimes conflict. Ethics refers to more universal and timeless principles.”¹

The *Code* that evolved in 1994 is reprinted below as one example of a code that addresses the ethical issues for information professionals working with health information. Most health science libraries and alcohol and drug

¹Medical Library Association, Ethics Task Force. “Draft Code of Ethics for Health Sciences Librarians: Introduction.” Presented for discussion at an open forum at the MLA Annual Meeting” Cincinnati OH, June 5-10, 1993.

information centers are integral parts of other organizations. As such, they are bound by the code of ethics adopted by their parent organization. As information professionals, there are areas of conduct specific to the management of an information center that require professional decisions with ethical overtones.

**CODE OF ETHICS FOR
HEALTH SCIENCES LIBRARIANSHIP**

GOALS AND PRINCIPLES FOR ETHICAL CONDUCT

“The health sciences librarian believes that knowledge is the *sine qua non* of informed decisions in health care, education, and research and the health sciences librarian serves society, clients, and the institution by working to ensure that informed decisions can be made.”

Society: The health sciences librarian promotes access to health information for all and creates and maintains conditions of freedom of inquiry, thought, and expression that facilitate informed health care decisions.

Clients: The health sciences librarian works without prejudice to meet the client’s information needs. The health sciences librarian respects the privacy of clients and protects the confidentiality of the client relationship. The health sciences librarian ensures that the best available information is provided to the client.

Institution: The health sciences librarian provides leadership and expertise in the design, development, and ethical management of knowledge-based information systems that meet the information needs and obligations of the institution.

Profession: The health sciences librarian advances and upholds the philosophy and ideals of the profession. The health sciences librarian advocates and advances the knowledge and standards of the profession. The health sciences librarian conducts all professional relationships with courtesy and respect. The health sciences librarian maintains high standards of professional integrity.

Self: The health sciences librarian assumes personal responsibility for developing and maintaining professional excellence.

Medical Library Association. Code of Ethics for Health Sciences Librarianship, Chicago, IL : MLA, 1994.

“Although no professional code of ethics can provide absolutes for every situation, the librarian’s code can perform two valuable functions. First, it’s

very existence informs the profession itself and those it serves of the core values of its practitioners. Second, it creates a presumption in favor of certain values that must be consciously overcome if library policy is made to the contrary.”²

The Special Libraries Association (SLA) has addressed the issue also, but has agreed *not* to adopt a code. Their lack of agreement was not about the obligations of an information professional, but rather about possible legal implications for some members. The PREPS Commission of the SLA in 1992 summarized the ethical issues facing information professionals and proposed that members agree to be bound by the following obligations of professional conduct³:

- * To provide users with the most current, accurate and relevant information, regardless of personal beliefs or the possible uses to which the information might be put.
- * To protect the confidentiality and privacy of individuals requesting information.
- * To select and organize information resources responsibly to support the highest quality information services for the organization, consistent with the mission of the organization.
- * To avoid misrepresentation of the purpose for gathering information or the use to which it will be put, in order to gain information which might otherwise be withheld.
- * To uphold and actively advise others to uphold all laws governing the creation, reproduction and dissemination of information.
- * To abide by the legalities governing the employing corporate structure.

“Special librarians have a dual identity arising from their work in libraries which support the goals of another profession or organization. They may find their professional values in conflict with institutional ones. The 1939 code of ethics for librarians recognized these sometimes competing obligations to institution, governing authority, users, the profession, and society. The 1981 code identified core values of the profession, including the highest level of service, confidentiality, access to information and avoidance of conflict of interest. Starting with a presumption in favor of each of these values, Jean Preer in an article based on a presentation at the Washington DC Chapter of the SLA in April 1991, proposes a two-part test for approaching the ethical dilemmas arising in special libraries.”⁴

Copyright Law

An area of law that has particular significance for information centers is copyright law, intended to protect the rights of authors and publish-

²Preer, Jean. “Special ethics for special librarians?” *Special Libraries* 82 (1):13, 1991.

³“Recommendations of the PREPS Commission. *Special Libraries* 83(4), 242-243, 1992.

⁴Preer, Jean. “Special ethics for special librarians?” *Special Libraries* 82 (1):12, 1991.

ers. Of special concern are the rules which govern the conditions under which it is permissible to photocopy published materials. This is significant in determining what users can and cannot duplicate and for what purposes. Although the center is not legally liable for multiple copies that users make on the center's self-service copy machine, the center is responsible for posting a notice near the machine notifying users of the copyright law. The box on the left lists the guidelines for determining *fair use*. In brief, *fair use* law attempts to allow public access while preventing substantial economic loss to authors.

Arrangements have been put in place for situations in which multiple copies are required and for circumstances which exceed what is permissible under the *fair use* provisions. The Copyright Clearinghouse Center, Inc. (CCC) helps organizations, academic institutions and government agencies make authorized photocopies without the burden of obtaining photocopy permissions themselves. It covers more than 1.5 million publications worldwide including scholarly and technical journals, magazines, newsletters, books, and more. An information center can send just one payment to the Copyright Clearinghouse for all titles copied and then the Clearinghouse Center distributes the fees to the copyright holders. See *Appendix A – Organizations* for more information about the CCC.

The information center's director has a responsibility to be familiar with copyright law and the center's compliance with it. In addition to photocopying, in-house databases are another area that may be impacted by copyright law especially if the center wishes to include author abstracts. In addition, audiovisual materials that are loaned for use other than in individual homes are subject to rather complex copyright laws. See *Appendix D* for a discussion. The information center should also be prepared to help patrons understand what is and is not permissible, and where to get further information.

Suggested Reading

Reference

Wynar BS ; Patterson AG (eds.). *Recommended Reference Books for Small & Medium-Sized Libraries & Media Centers*. Englewood, CO : Libraries Unlimited, 1993. 300 pp. \$39.50. ISBN 1 56308 155 5.

Copyright

Gasaway LN ; Wiant SK. *Librarians and Copyright Law in the 1990s*. Washington, D.C. : Special Libraries Association, 1994. ISBN 0 87111 407 0.

Offers practical solutions to copyright issues in libraries in addition to theoretical discussions of library and user's rights in copyright. Includes the basics of copyright law, fair use, reproduction of copyrighted works under the section 108 exemption for libraries, audiovisual and other non-print works, computer software and electronic databases.

Valauskas EJ. "Copyright: Know your electronic rights." *Library Journal* August 1992: 40-43.

Citing electronic information

Crane N; Li X. *Electronic Style: A Guide to Citing Electronic Information*. Westport, CT : Mecklermedia Co., 1993. 65pp. ISBN 088736909X

Ethics

Hauptman, R. *Ethical challenges in Librarianship*. New York : Oryx Press, 1988.

Medical Library Association. *Code of Ethics for Health Sciences Librarianship*. Chicago, IL : MLA, 1994.

Medical Library Association, Ethics Task Force. "Draft Code of Ethics for Health Sciences Librarians." Presented for discussion at an open forum at the MLA Annual Meeting. Cincinnati, OH, June 5-10, 1993.

Mintz, AP. *Information Ethics: Concerns for Librarianship and the Information Industry*. Proceedings of the 27th Annual Symposium of the Graduate Alumni and Faculty of the Rutgers School of Communication, Information and Library Studies, 14 April 1989. Jefferson, NC : McFarland & Co., Inc.

Preer, J. "Special ethics for special librarians?" *Special Libraries* 1991; 82(1): 12-18.

Special Libraries Association. "Recommendations of the PREPS Commissions." *Special Libraries* 1992; 83(4): 242-243.

Section 6. Promotion and Funding

Promoting the Information Center

Why is promoting the center important? Because an information center is like any service — people can only use it if they know about it! But to have others really “know” about the center often means more than just telling them the center exists. Often it means actively offering services so people discover through experience how valuable the center can be.

An important step before starting to promote the center is to first think about those the center wishes to serve. Try to answer these questions — What are the issues that concern them? What kinds of materials do they find useful? What can the center do to assist them? How do these groups or individuals get their information?

If the center is sponsored by an organization, the same questions need to be asked. What is important to the organization? How can the center help the organization be more effective and visible? What can the center do to demonstrate its ability to help? Who are the people in the organization the center should try to serve? Is the organization having special problems that the center’s services may help solve? Who are the people in the organization who need to learn about the center and its services? If the center is supported by an organization, the center’s success will ultimately be defined by its ability to assist that organization.

Different kinds of promotional activities are needed. Some promotional activities will be special projects or programs; others may well be regularly occurring activities. There is no single activity that will succeed in telling everyone about the center.

Suggestions for Promotional Activities

Brochure About the Center. The center’s brochure might include: the services the center offers, the types of information it has, where the center is located, its telephone number, and when it is open. The brochure should be professionally designed with an uncluttered appearance and printed on good quality, colorful paper. Send it to people who should know about the center and strategically place it in your organization and community so people can pick it up – the public library, supermarkets, the town hall, and schools.

Posters. These can provide the same kind of information as the brochure. Make them colorful, attractive, and small enough to be easily posted on bulle-

tin boards.

Newsletters. Prepare a newsletter for the center or provide information about the center to others who write newsletters. Tell about new publications in the information center, changes in services, and meetings or events. This can be a very effective means of promotion. Each time a new issue arrives, people are reminded of the center. Some publishers of books and newsletters will offer free “review copies” of books to the center if a book review and/or notice is published in the newsletter. Exchanging your newsletter with other organizations can bring newsletters to the center without subscription costs.

Displays and Exhibits. These are also good ways to promote the center’s services. If the display includes books, prepare a list of the books on display with the center’s logo or letterhead. Visitors won’t have to copy titles and the center will receive increased visibility.

Talks and Presentations. Presentations about new resources and how to find them may be of interest to schools, health care providers, and others in the community. Ask members of your organization to mention the center’s services and distribute center brochures whenever they make presentations.

Attendance at Meetings. Look for opportunities to attend meetings within your organization. Offer to help prepare reading lists for projects and programs, or offer to find current statistical information and research materials for the presenters.

Provide Quality Services. All the services the center provides must be of the highest quality. A user may mention to one or two people the good assistance received at the center, but will tell nine or ten about a rude or intimidating response from someone working in the center.

Successful promotion and public relations activities will not only increase the use of the center, they can also help improve the funding of the center. If the host organization perceives the information provided by the center to be essential to the materials it is developing and the speeches its members are writing, the organization will have a self-interest in protecting and expanding the resources of the center.

In addition, the increased visibility that results from the promotional activities may make it easier for the center to seek funding from foundations and other organizations or agencies. Even if the center does not seek general funding, the center may choose to seek funding for a special project such as book-marks, an exhibit, or a complementary newsletter to a broad audience. However, this must never be undertaken without approval from the director of the

host organization. The center and agency must choose carefully the organizations they accept funds from. No fund-raising activities should be initiated by the center without written, advance approval from the host organization.

Budgeting

A budget is the “library or information center’s central planning document and it is also the authorization to proceed on those plans.”¹

A budget is a planning document that justifies recommended expenses. A budget can make it possible to undertake exciting and vital library operation. Resources in an organization are allocated in response to budget presentations. A budget is much more than a list of where money has been spent.

Developing budgets is an inevitable part of an administrator’s tasks. It is a general requirement within agencies, even when the agency is the sole source of a center’s funding, and it is also a requirement for all grant applications. A bit of thought as to how to approach this budgeting process is helpful. Typically there are three major categories of expenses: personnel, non-personnel and indirect costs.

Personnel Costs. In addition to salaries and wages, personnel costs include fringe benefits. Fringe benefits cover an employer’s contribution for health insurance, disability, retirement, and the like. Agencies generally have a formula for determining these costs as a fixed percentage of the employee’s salary. The percentage may be as much as 35% of the salary. The personnel portion of a center’s budget is inevitably the single largest budget item.

Non-personnel costs. These include expenses for the purchase of materials for the center, such as books, journal subscriptions, and videotapes. It also includes equipment costs for computers, office furniture, computer software, and other related items.

Office expenses and supplies form a sub-category of non-personnel costs which cover telephones, duplication expenses, stationery, etc. Travel makes up another separate sub-category, and special fees for organizational memberships, consultants, or vendor services make up one more. Printing costs, which can be substantial, are another sub-category. Agencies and grant applications generally will indicate the particular categories to be used in designing a budget. For the center’s purposes, the categories selected should reflect the different kinds of expenditures it plans to utilize.

Indirect costs. These represent the costs associated with rent, heat, and electricity that an agency allocates to its different programs.

¹ Koenig MED. *Budgeting Techniques for Libraries and Information Centers.* New York: Special Libraries Association, 1980. p.1.

Types of costs. Another useful distinction to make in considering a center's budget is the portion of expenses that represents fixed costs versus those which are variable. *Fixed costs* are expenses that represent simply the costs of "being in business." For example, personnel and salaries are constant, predictable, and incurred independent of the level of activity. In a sense, one has to hire people even before one opens the door. There are other costs that vary with the level and type of activity; these are "variable costs." Variable expenses include such things as long distance telephone charges, costs for printing and the cost of materials. These costs can change. Also they are not incurred until particular projects or activities take place. In constructing a budget, fixed costs are easier to estimate. Variable costs represent a "guesstimate." The estimates can be reasonably accurate if one sets down the expected activity, reviews the expenses that are involved, reviews similar costs for prior years, and keeps in mind anticipated or desired changes.

Budgets as Tools for Planning

It is easy, once a budget has been developed and monies set aside, not to think about it again until the time comes to revise it. However, regularly reviewing expenses which relate to particular kinds of efforts can be a very useful device in planning and determining how particular projects will be conducted. One very simple example might be the preparation of handouts which a center wishes to provide. As part of its outreach efforts, a center may wish to distribute to schools a list of resource materials. It wants to list materials the school might purchase for its library, as well as local resources that can provide speakers or lend films. At first glance this might appear to be a very low cost item and something the center can "easily" do. In reality, this may not be the case.

To estimate the cost associated with the effort, there are different things to be considered. For example: Is this information already on hand, so that the project involves primarily compilation? If not, how much professional and staff time is required to identify materials, secure copies, and review them in order to make informed decisions as to what will be included on the list? How much time will be needed to prepare a draft of the list, on a word processor, and to proofread it so as to have camera-ready copy for either printing or duplicating?

If these factors are taken into account, the minimal cost of preparing such a wholly new resource list might be considerably more than one had expected.

Professional Time

20 hours x \$ 20/hr. \$ 400.00

tasks: identifying materials, reviewing materials, drafting annotations, contacting local agencies, proofing final copy, drafting cover letter for distribution, other

Staff Time

20 hours x \$ 12/hr. 240.00

tasks: identifying sources of items, securing copies, word processing, proofing final copy

Non-personnel Costs

items:

duplication (10 pages x .05 page x 50 copies)	25.00
materials purchase	50.00
postage (50 packets x .50)	25.00
miscellaneous	<u>15.00</u>
	115.00

Total Costs: \$754.00

With a sense of the actual cost of a particular item, one is in a better position to make choices between doing A or B or C. One is also prompted to consider alternative means to accomplish the same objective. In the above case, it probably would be wise to determine if a colleague has already developed a suggested core collection for school libraries. If so, one can request permission to duplicate the list, crediting those who developed it. Also, one might decide that rather than trying to include a section on local resources, one might simply list the center, or another organization, that is able to provide further assistance. If one looks at the costs associated with this second alternative, both professional and staff time are significantly reduced, possibly by as much as 75%, and other expenses are essentially only those associated with preparation of the material for duplication and associated printing and mailing costs, for a total cost of approximately \$275.00.

Revenue

The above discussion focused upon expenses. The opposite side of the coin is revenue or income. There are generally three different sources of revenue for a center. The first is the basic *operating funds or subsidy* which a center receives from its host agency. Another income source is from *contracts, grants, or monies* that the center receives for *special projects*. This might be a grant or contract from a state agency to develop a set of materials that they would then distribute and make available. In such instances, the center has contracted to provide a specialized service for which a fee is paid. Another source of potential income is *user fees*. This latter category may be the most troublesome for centers. In many instances user fees cannot be set at a level to wholly reimburse costs. In this case, any income helps to offset or reduce costs, but the services are in fact partially subsidized by the host agency.

Fees

Setting Fees. In setting fees one needs to take into consideration several factors. One is the actual cost of providing the service. How much staff time is involved? Again, there are likely to be real costs that may not be immediately apparent. If the center allows, and even encourages people to use the collection, how much staff time must be devoted to explaining how to locate materials, orienting users to the files, demonstrating how to search on a computerized

database, responding to questions, printing out the results of a computer search, or locating *and* re-shelving materials the patrons browse through? Or, if the center has a circulating collection, how much staff time is consumed by checking out and retrieving materials that are borrowed? What is the volume of materials that need to be reshelved or that are never returned and/or otherwise lost? Is there special equipment the center needs to have on hand to accommodate users? For example, does the center need a separate computer terminal or photocopy machine designated for clients? Recognizing that there are real costs, centers may want to consider categories of clients, differentiating between those they have been established to serve versus those affiliated with other groups. Centers may well wish to distinguish between staff of a for-profit treatment program versus personnel of a local, not-for-profit community agency.

Another important item in considering fees is the cost of collecting and processing monies. Do people pay as they go? Is prepayment required on orders? Or, must the center generate a bill, send it out, and deal with collection issues? Are there some regular users for whom the most cost-effective way to handle fees is to send out statements on a quarterly basis? If so, it may be useful, so as to avoid later misunderstandings, to designate a maximum amount that can be charged.

Types of User Fees. Typically there are different kinds of fees that a center may charge which reflect different types of services. One obvious area is a charge for materials, such as a fee for resource lists, or a mailing and handling fee even if the materials themselves are free. There are also fees that might be levied for specialized professional services, such as conducting specialized literature searches or responding to a special information request. In establishing fees for these services, the major item to consider is the personnel time involved. Some centers have a policy of responding to questions that can be answered in 15 minutes or less without charge. However, depending on the volume of such requests, such individual small services can add up and reflect a significant amount of staff time. The center definitely benefits from the time invested in responding to users. That is, without a doubt, the most effective way of learning what the interests of users are and how well the center's materials respond to those interests. The center also learns of the need for new kinds of materials and may wish to assemble information packets for frequently asked questions. The packets, pre-assembled, can be handed out with a minimum of effort.

The above discussion serves primarily as background on the kinds of questions a center needs to answer as it considers the matter of fees, cost recovery, and income. Beyond books on this topic, a source of assistance is other centers, as well as administrative and fiscal personnel within one's own host agency.

Suggested Reading

Promotion

Herring MY. *Organizing Friends' Groups : A How-To-Do-It Manual for Librarians*. New York: Neal-Schuman Publishers, 1993. ISBN 1555700624. 144pp.

Includes chapters on preparing for and organizing an advisory or friends' group, setting up programs and annual events, and developing public relations activities. Bibliography.

Sherman S. *ABC's of Library Promotion*. 3rd edition. Scarecrow Press, 1992. 263pp. \$29.50

Budgets

Barber P; Crowe L. *Getting Your Grant : A How-To-Do-It Manual for Librarians*. New York: Neal-Schuman, 1992. \$35

Shaver M. *Public Funding Resources for Alcohol and Other Drug Programs*. Piscataway, NJ: NJ Alcohol/Drug Resource Center & Clearinghouse, 1993. \$14.95. Phone: 908/932-0787.

Useful to those seeking public funding for alcohol/drug education and prevention. It includes information on —

- 1) How to access federal grant funding programs
- 2) Currently active programs and contact sources
- 3) Listings for both activity and research programs
- 4) Understanding and using the *Federal Register*
- 5) Using the *Catalog of Federal Domestic Assistance*.

Koenig MED. *Budgeting Techniques for Libraries and Information Centers*. New York: Special Libraries Association, 1980. 71 p. ISBN 0 87111 278 7. Currently available as a reproduction of the original edition.

A handbook for the budgeting process from the perspective of planning and justifying the library's future operations.

Center for Substance Abuse Prevention (CSAP). Substance Abuse and Mental Health Services Administration. *CSAP's Foundation Resource Kit*. Rockville MD: National Clearinghouse for Alcohol and Drug Information (undated).

3 audio tapes and a loose leaf notebook. Includes useful information for those charged with accessing philanthropic organizations- grant proposal development, selection of organizations to approach and bibliographies.

Section 7. Evaluating the Information Center

The Need for Self-Evaluation

Evaluating your library and information services is an important step in the process of continuous improvement. It is also useful as a means of communicating to funders and others evidence of the need for the program. People often become anxious over the thought of evaluation because many of us think of evaluation in terms of “accountability” or “judging.” A more helpful approach to self-evaluation may be summed up in this statement: Evaluation is gathering, analyzing, and applying information to improve your program. In evaluation one asks questions about the services and finds the information to answer them. The answers are used not only to determine how well the center has done but also to identify areas for improvement, to make services more efficient and effective.

The Link Between Evaluation and Center Goals

It is important to tie evaluation to the mission and goals of the information center. What services most clearly exemplify its reason for being? Determine a short list of those services the center is most interested in learning about, rather than attempting to learn everything. Then think about questions of effectiveness and efficiency in regard to those services.

Reviewing Services

Also known as “process evaluation” or “monitoring,” questions regarding the center’s services document the effort the program has put into achieving the goals consistent with its mission. Some examples:

- * How many information requests did we respond to in the last fiscal year?
- * How many information packets were sent out?
- * Did the center serve its primary clientele?
- * What channels or methods were used to respond to information requests?
- * How many library materials were lent?
- * What subjects was the center asked most frequently to supply information on?

These questions are most easily monitored on an on-going basis rather than

trying to assemble the information after the fact. One way of doing this is through the use of standard forms which describe the service as they are provided (see Figures 1 and 2). Having this information will make it easier to prepare periodic, such as monthly, reports of activities (see Figure X).

In designing forms to monitor center activity, be sure to include all relevant staff in the development stage of these forms. Ask them for feedback as they use the forms, so the forms may be modified over time.

Figure 1
Sample Form for Monthly Report

Alcohol and Drug Information Center
Monthly Report for:

Month: _____

Year: _____

of information requests completed _____

of free materials distributed _____

of photocopied items _____

of library materials used: In-house _____

Circulated _____

of videos lent _____

Significant contacts made with other ATODA information centers:

Special Projects:

Special events or changes in operations:

Date of report: _____

Staff initials: _____

Figure 2
Sample Form

Educational Materials Requested

Check all that apply:

Organization Type:

- | | | |
|--|---------------------------------------|---|
| <input type="checkbox"/> Private | <input type="checkbox"/> Non-Profit | <input type="checkbox"/> Voluntary Organization |
| <input type="checkbox"/> State Govt. | <input type="checkbox"/> County Govt. | <input type="checkbox"/> Municipality |
| <input type="checkbox"/> Community-based | <input type="checkbox"/> Statewide | <input type="checkbox"/> Other |

Target Population:

- | | | |
|---|---|--|
| <input type="checkbox"/> Urban | <input type="checkbox"/> Rural | <input type="checkbox"/> Suburban |
| <input type="checkbox"/> Children | <input type="checkbox"/> Adolescents | <input type="checkbox"/> Adults |
| <input type="checkbox"/> Elderly | | |
| <input type="checkbox"/> Lesbian/Gay/Bisexual | <input type="checkbox"/> Women | <input type="checkbox"/> Disabled |
| <input type="checkbox"/> Asian/Pacific Islander | <input type="checkbox"/> African American | <input type="checkbox"/> Native American |
| <input type="checkbox"/> Hispanic/Latino | | |
| <input type="checkbox"/> Other _____ | | |

**Figure 3
Sample Form**

Description of Information Requests

SUBJECTS

(Check all that apply)

- Alcohol, tobacco, drugs (T01) _____
- Assessments, community (T02) _____
- AIDS/HIV (T03) _____
- Communication aspects (T04) _____
- Community organizing (T05) _____
- Education (T06) _____
- Evaluation and research (T07) _____
- Health, general (T08) _____
- Laws and policies (T09) _____
- Physiology/biochemistry (T10) _____
- Prevalence, patterns, and consequences (T11) _____
- Prevention (T12) _____
- Programs, services, and systems (T13) _____
- Social issues, other (T14) _____
- Training, technical assistance (T15) _____
- Treatment (T16) _____
- Other (T17) _____

SPECIAL POPULATIONS

(Check all that apply)

- Asians and Pacific Islanders (P01) _____
- Blacks/African Americans (P02) _____
- Children (0-12 years) (P03) _____
- COAs, COSAs (P04) _____
- Economically disadvantaged (P05) _____
- Elderly (P06) _____
- Gay, lesbian, bisexual (P07) _____
- Handicapped/Disabled (P08) _____
- Hispanics/Latinos (P09) _____
- Native Americans (P10) _____
- Rural (P11) _____
- Urban (P12) _____
- Suburban (P13) _____
- Women (P14) _____
- Young adults (18-25 years) (P15) _____
- Youth (P16) _____
- Other (P17) _____

Information Request Response (Check all that apply)

- Verbal information _____
- Number of free materials _____
- Number of photocopied items _____

Library use of materials:

- in-house _____
- loan _____

Total number of pieces of materials distributed _____

Note: The use of a numeric code allows fast tabulation of results.

Questions About Effectiveness

Once you have reviewed the center's services, queries regarding effectiveness will help the center answer the question: "Did our services work?" They are also referred to as "outcome evaluation." Some examples:

- * How satisfied were users with materials received?
- * How satisfied were users with information received? Was it timely? In a usable format? Thorough enough?
- * What current materials and services are most useful to our users?
- * In what areas can we provide more, and more useful, information?

These questions are often best answered through a survey of users.

Questions About Efficiency

Questions about effectiveness lead directly to questions about efficiency. These questions are about the cost of reaching the desired outcome. The cost can be in terms of dollars, staff time, planning time, or any other measurable resource. Some examples:

- * How many dollars in grant money were accrued by your clientele as a direct result of information dissemination on grant funding?
- * How many users saved funds by borrowing videos for preview, rather than paying for preview?
- * How many community programs have used or developed handouts or curricula by using free materials you distribute, rather than purchasing such items?
- * How much staff time have programs saved in tracking down statistics, program information, addresses, other sources of information by using your services?

When calculating the costs of a particular service, be sure to include all possible expenses. For example, photocopying of library items for users entails not only the cost of paper but rental of the copier, repairs, toner, staff time, wear on library materials, etc. Knowledge of actual costs of services is useful when planning. Coupled with what one learns about the users' expressed value of individual services, this knowledge helps the center make decisions about which services are most cost-effective. This is especially useful when faced with difficult choices in service priorities.

Surveying Users

A survey of users is one means of gathering information about the center's services. In designing a survey, limit it to questions that will provide informa-

tion the center can and will use. Consider how the center will use the information provided. For instance, if the survey asks a question about clientele served, does the center intend to modify services in order to better serve particular groups that may be missing? Be sure to limit questions in order to get answers to the most important ones and to insure a greater likelihood of response. When the center chooses a question for the evaluation, it must be able to repay the effort involved in asking and answering it. The questions need to be tied to the center's mission and most important goals.

In designing a survey there are two types of questions: "closed" and "open-ended" questions. Closed questions force the respondents to fit their answers into the categories that are provided. Open-ended questions allow respondents to create their own categories. Closed questions provide information that is easier to tabulate; one can simply count the number of responses to various choices. Open-ended questions have the advantage of allowing for things that you may not have considered.

Questions that relate to satisfaction (happy-unhappy), or frequency (often-never) can be constructed using a Likert Scale. In creating such a scale it is helpful to define the different choices. Limit the number of choices because the center will not get any more information if there are 10 choices than if there are only four. Also, do not use an odd number of choices. Inevitably, the middle one is over-selected and treated as if it represents "average." (See Figure 3 for examples of this kind of scale.)

Designing a Survey

In designing a survey consider what information is already available through the record-keeping system of the center. Special questionnaires may be administered in person, by mail or over the telephone. Response rates will vary, depending on the method used. Each method has strengths and weaknesses, and varies in terms of cost. Interviews, by telephone or face-to-face, allow for interaction between the questioner and the respondent, and thus the ability to ask for more detail or clarification. Another method for eliciting information is through the use of a focus group. This is in essence a group interview, conducted by a facilitator, intended to cover a predetermined number of topics while also allowing for topics to arise which seemingly are important even if they are not part of the initial interview outline.

Selecting a Sample

After the center has determined the questions to be asked, the next issue is determining to whom these will be directed. If it is everyone served by the center, that represents a population study. This is only possible if the center serves a small number of users, up to 100. When larger numbers of people are served, the center will only be able to survey a portion. Then the issue becomes

Figure 4
User Survey: Sample Questions

A. The center makes available the following materials. Please indicate how satisfied you have been with the materials you have received. Circle the number that most closely matches your assessment using the scale below.

0	1	2	3	4
Not Applicable	Very Satisfied	Somewhat Satisfied	Somewhat Satisfied	Very Dissatisfied

Free Materials

Books, pamphlets, resource guides	NA	1	2	3	4
Newsletter	NA	1	2	3	4
Bulletin of new materials	NA	1	2	3	4
Suggestions or Additional Comments: _____					

Materials For Sale

Responses to telephone information inquiries	NA	1	2	3	4
Information about workshops and training	NA	1	2	3	4
Videotape rental	NA	1	2	3	4
Borrowing books from the center	NA	1	2	3	4
Suggestions or Additional Comments: _____					

B. Please rate the following services offered by the center.

Customer service when ordering materials	NA	1	2	3	4
Responses to telephone information inquiries	NA	1	2	3	4
Information about workshops and training	NA	1	2	3	4
Videotape rental	NA	1	2	3	4
Borrowing books from the center	NA	1	2	3	4
Suggestions or Additional Comments: _____					

C. On which subjects do you feel you need more information? (Check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> Alcohol and other drug abuse prevention | <input type="checkbox"/> General treatment |
| <input type="checkbox"/> Program evaluation | <input type="checkbox"/> Fund raising |
| <input type="checkbox"/> Prevention strategies, other than AODA | <input type="checkbox"/> Community development |
| <input type="checkbox"/> Special populations (specify) | |
| <input type="checkbox"/> Other (specify) | |

D. From these items in the above list, what are the two subjects of greatest interest?

E. Have the center's services been of assistance? Yes No
In what ways?

selecting those to be surveyed. The center may be particularly interested in those who use a particular service or represent a sub-group of clients. The task becomes selecting a sufficient number to have a range of responses and assuring that there is representation from all groups whose opinions are of interest. The *Suggested Reading* list includes materials on survey design and sampling.

Analyzing the Data

Before beginning to collect data, the center needs to have an analysis plan. This plan summarizes the ways in which the information collected answers the questions that were asked. If the center waits until after collecting the data, it may find that the analysis it wants to do demands data it did not collect. Or it may have collected data which has no real use.

Figure 5 summarizes major points in developing a plan for analysis.

Figure 5

Developing a Plan for Data Analysis

1. Write -- THE QUESTION -- here.
2. Who is interested in my results?
3. What descriptive information will I report?
 - 1.
 - 2.
 - 3.
 - 4.
 - 5.
4. What methods of analyzing relationships will I use?
 - a. Contingency tables?
 - b. Comparisons of means?
 - c. Correlation?
5. How will I define a difference that is meaningful in a practical sense?
6. Which test of significance will I use? Why?

From: Hawkins JD; Britt Nederhood. Handbook for Evaluating Drug and Alcohol Prevention Programs: Staff/Team Evaluation of Prevention Programs (STEPP). Rockville, MD : Office of Substance Abuse Prevention, Division of Demonstrations and Evaluations, 1987.

Statistical Analysis

Data can be analyzed in two ways. The information can be considered descriptive or it may endeavor to look at relationships. (The latter is less likely to be applicable to the information center.)

Descriptive statistics answer questions such as:

- * How many information and referral requests were completed?
- * How many library materials were lent?

- * What is the composition of users, e.g. individuals or organizations, and what kinds of individuals or organizations?
- * What topical areas represent the largest numbers of information requests?
- * What are the characteristics of those served by our users?

Relationship statistics examine possible relationships between things. An example might be that book circulation declines as videotape use increases. If you wish to find effects that are statistically significant you should start by consulting publications on the *Suggested Reading* list to learn about data analysis and then work with an evaluator.

Summarizing the Findings

It is important to communicate the findings of the evaluation in ways that are usable and appropriate. Questions to be addressed include: Who needs to know what, when, and for what reason? What is the best way to communicate specific findings to specific audiences? Sometimes it is helpful to present the findings orally as well as in writing. Is a final report required? If so, what will be included in the final report?

Using the Results

It is important to view an evaluation not as a judgment of the program or services but as an effective tool for continuous improvement. Involve all staff in using evaluation results to change programs and their priorities. Connect any planned changes to specific information gained from the evaluation. Prioritize changes based on effort involved in carrying them out and the potential for improvement of user satisfaction. Making actual improvements based on the data is an important step in confirming for staff and respondents that their time was well spent.

Suggested Reading

Evaluation Casebook: Using Evaluation Techniques to Enhance Program Quality in Addictions. Toronto, Canada : Addiction Research Foundation, 1994. 274 pp. CAN \$39 (20% discount to libraries).

Straightforward advice on conducting effective program evaluation. Step-by-step format to receive clear answers to questions, collect data, present findings and apply the results. For novices and experienced program evaluators. Available in French as well as in English.

Hawkins JD; Nederhood B. *Handbook for Evaluating Drug and Alcohol Prevention Programs: Staff/Team Evaluation of Prevention Programs (STEPP).* Rockville, MD: Office of Substance Abuse Prevention, Division

of Demonstrations and Evaluations, 1987. DHHS Publication No. (ADM) 87-1512.

A step-by-step guide for organizing and carrying out an evaluation, and analyzing and reporting the results. An excellent tool for those new to evaluation.

Herman JL; Morris LL; Fitz-Gibbon CT. *Evaluator's Handbook*. (Center for the Study of Evaluation, UCLA, Program Evaluation Kit 1.) Newbury Park, CA : Sage Publications, 1987.

Part of the CSE Program Evaluation Kit (9 vols.), this publication provides an overview of evaluation activities. It includes specific guides for accomplishing three types of studies: a formative evaluation, a standard summative evaluation, and a small experiment or pilot test.

Muraskin LD. *Understanding Evaluation: The Way to Better Prevention Programs*. Washington, DC : United States Department of Education, 1993.

Includes steps in designing program evaluations and implementing an evaluation design. Illustrates principles with an in-depth case study.

Robbins J; Zweizig D. *Are We There Yet? Evaluating Library Collections, Reference Services, Programs, and Personnel*. Madison: University of Wisconsin – Madison, School of Library and Information Studies, 1988.

This publication came out of a series of five tutorials on evaluation for libraries, and includes lessons in several areas with associated readings. It connects evaluation to planning. The authors suggest that evaluation needs to be used as a tool for moving toward library goals, rather than simply answering the question “How good is it?”

Van House, NA; Weil, BT; McClure, CR. *Measuring Academic Library Performance: A Practical Approach*. Chicago, IL : American Library Association, 1990. 140 pp. \$34. ISBN 0 8389 0529 3.

An excellent resource when asked questions about accountability. Presentation is very clear with overviews for each topic. Strength of book is the statistical measure section which includes charts, tables and very good “how to” instructions.

Williams RV. Productivity measures in special libraries. *Special Libraries* Spring 1988; 79(2): 101-114.

This article looks at productivity measures as a performance assessment tool. It compares productivity measurements with other evaluation tools used in special libraries, such as cost-benefit analysis, value appraisals, and quality measures.

Zweizig D, et al. *Evaluating Library Programs & Services: TELL IT!* Madison : University of Wisconsin – Madison, School of Library and Information Studies, 1993.

This publication ties evaluation into the library planning process. It uses the TELL IT! approach, offering practical steps in doing library evaluation. The authors focus on evaluation as an improvement tool.

<i>Abstract</i>	A paragraph that summarizes the important points of a given text.
<i>Accession Record</i>	An inventory list or computer record of all materials held in a center. Materials are entered in chronological order on arrival. Each item is assigned a unique accession number.
<i>Accession Number</i>	Unique number assigned to an item when it is recorded in the accession record.
<i>Annotate</i>	To explain or make comments.
<i>Archive</i>	To preserve records or information. Also, the place in which records are preserved.
<i>Authority File</i>	A card file or list of subject headings selected to organize an information collection.
<i>ATOD</i>	Acronym for <u>a</u> lcohol, <u>t</u> obacco, and <u>o</u> ther <u>d</u> rugs.
<i>Bibliography</i>	List of publications on a subject. Bibliographies include authoritative information about each publication including the author, title, publisher, place of publication and date of publication. An <i>annotated</i> bibliography includes a short commentary about the usefulness of the publication. A <i>selected</i> bibliography includes only publications that the bibliographer has chosen to include.
<i>Bibliographic Utility</i>	A commercial or not-for-profit organization that provides customers with a range of technical services including cataloging, interlibrary loan, acquisition services. Although most often used by larger libraries, a bibliographic utility may be most useful to a small library for its ability to provide <i>MARC</i> records.
<i>BBS BulletinBoard System</i>	A computer system that offers its users files of data and/or information to download in addition to areas for electronic discussions. BBSs are usually provided to a specific group or membership, but many are linked to the <i>Internet</i> for email and some are accessible via the <i>Internet</i> in addition to direct telephone access.
<i>Boolean Operations</i>	Most <i>databases</i> allow searches with Boolean operators i.e. AND, OR, NOT. AND means a record must have <i>both</i> search terms in it. OR means it can have <i>either</i> term, and NOT means it <i>cannot</i> have the specified term.
<i>Catalog</i>	A concise index to materials in the library. The format may be on cards, on microfiche, or on a publicly accessible online electronic catalog.

<i>CD-ROM</i>	Acronym for <u>C</u> ompact <u>D</u> isc- <u>R</u> eady <u>O</u> nly <u>M</u> emory. Sometimes called optical discs. Similar to music CDs. Store huge quantities of data including graphics, sounds and animation. Accessed through a CD-ROM player connected to a computer.
<i>Circulation System</i>	A scheme to issue or loan materials.
<i>Classification System</i>	A logical, systematic means to arrange materials on shelves or in file drawers using numbers and/or letters.
<i>Clearinghouse</i>	A central location for the collection, classification, organization and distribution of information on a special subject.
<i>Client</i>	Computers on the <i>Internet</i> can be divided into two types, host machines and client machines. <i>Host</i> computers are usually powerful machines that can host many requests for information simultaneously. A client computer usually sends and receive information for one individual and is often a microcomputer.
<i>Computer System</i>	Commonly refers to the <i>software, hardware</i> , printer and all the components that comprise the computer setup. Computer specialists use the words different ways.
<i>Cross-reference</i>	An entry in a file that directs the user from one word to another.
<i>Computer Network</i>	A group of computers designed to function interactively with connecting circuitry.
<i>Controlled Vocabulary</i>	A pre-defined list of words used to index a <i>database</i> . The words are called <i>descriptors</i> or <i>keywords</i> .
<i>Current Awareness Service</i>	A periodic library service that informs users about new books, articles, and other materials in a subject area of high interest to them.
<i>CWIS</i>	Campus Wide Information System. A networking system used at universities and colleges.
<i>Data</i>	Facts or figures from which one can draw conclusions.
<i>Database</i>	A large complex list of facts and information that may contain text, numbers and images. Today, <i>database</i> s are most often stored on computers, but elaborate paper filing systems were previously used. A <i>database</i> differs from a list because of the ability one has to locate specific information within a <i>database</i> by “searching” in several ways.
<i>Descriptor</i>	<i>Keyword</i> that is part of a <i>controlled vocabulary</i> used to search a <i>database</i> .

<i>Directory</i>	List of persons or organizations arranged in alphabetical or classed order usually giving addresses, telephone numbers, affiliations and functions.
<i>Download</i>	The electronic transfer of information from one computer to another, generally from a larger computer to a smaller one.
<i>Email</i>	Electronic mail.
<i>FAX</i>	Facsimile. A electronic method of transmitting or receiving an exact copy of an image or text over telephone lines. FAX transmission is currently the preferred method of rapid transmission of printed materials.
<i>FTP</i>	File Transfer Protocol. <i>Software</i> that allows files to be transferred electronically between computers on the <i>Internet</i> .
<i>FTR</i>	Full-Text Retrieval. Refers to electronic information sources that provide the full text of a given document in addition to a bibliographic citation and/or an abstract.
<i>Filing System</i>	A planned method of indexing and arranging materials so that they can be found quickly.
<i>Filmography</i>	A list or book about films or videos or film figures.
<i>Fugitive Material</i>	A report, paper or other information that is issued by a government agency or private organization and is <i>not</i> distributed through a publisher or other standard distribution channel. These materials are typically difficult for librarians and others to identify and locate.
<i>Gopher</i>	<i>Software</i> developed for <i>Internet</i> browsing. A simple means of storing, accessing and linking information on the <i>Internet</i> .
<i>Hardware</i>	The computer components such as the computer itself, the monitor, an external modem etc.
<i>Host</i>	Computers on the <i>Internet</i> can be divided into two types, host machines and client machines. Host computers are usually powerful machines that can host many requests for information simultaneously.
<i>Hotline</i>	A telephone line operational 24 hours/day with help and/or information.
<i>http</i>	Hypertext Transmission Protocol. The standard language used for communications on the <i>World Wide Web (WWW)</i> on the <i>Internet</i> .
<i>Hypermedia</i>	<i>Hypertext</i> that connects to other media, such as graphics and sound.

<i>Hypertext</i>	A way to design interactive documents so that any word in the document can act as a trigger to instantly link one to another document. One must only click on the word. Used on the <i>WWW</i> , hypertext makes locating and retrieving information very easy.
<i>Information</i>	Usable <i>knowledge</i> in a form that can be passed on among people.
<i>Interlibrary loan</i>	A service to users that may depend on the library's access to and relations with nearby libraries, membership in regional or statewide library systems, and on special programs for networking and resource sharing.
<i>Internet</i>	In 1994, a worldwide network of more than 30,000 computer networks and 25 million people. Using the <i>Internet</i> , one can send and receive electronic mail around the world, access electronic <i>bulletin boards</i> and discussions lists, search remote library online catalogs and identify and receive computer software and electronic documents of interest. The three basic functions of network communications are email, telnet and ftp.
<i>ISBN</i>	<u>I</u> nternational <u>S</u> tandard <u>B</u> ook <u>N</u> umber. International number scheme used by book publishers, bookshops and libraries to uniquely identify books.
<i>ISSN</i>	<u>I</u> nternational <u>S</u> tandard <u>S</u> erial <u>N</u> umber. International number scheme used by serial publishers, bookshops and libraries to uniquely identify serials.
<i>Jobber</i>	One who serves as an intermediary between publishers and subscribers or clients.
<i>Journal</i>	Any <i>serial</i> or magazine.
<i>Keyword</i>	A pre-selected word or <i>descriptor</i> that is a part of the <i>controlled vocabulary</i> used to index a <i>database</i> .
<i>Knowledge</i>	Data presented in a way that can be understood.
<i>LAN</i>	<u>L</u> ocal <u>A</u> rea <u>N</u> etwork. Two or more computers are connected to allow users to send files and messages to each other. One LAN may be connected to another independent LAN to form an <i>internet</i> (with a small i).
<i>Lateral Files</i>	File cabinets with drawers that roll out laterally and can be opened clear of the file cabinet itself so that 100% accessibility and visibility are possible.

<i>LISTSERV</i>	A read-only mailing list on the <i>Internet</i> used by a group of people with similar interests. Anyone can subscribe to a <i>LISTSERV</i> by sending a “subscribe” command to the <i>LISTSERV</i> address. Any letter sent to the list address is copied and sent to every member of the list. Members can choose to reply to the letter and lively discussions can ensue.
<i>MARC</i>	<u>M</u> achine <u>R</u> eadable <u>C</u> ataloging. In the late '60s Library of Congress (LC) started supplying <i>MARC</i> records to academic libraries. A cooperative evolved called the Ohio College Library Center (OCLC) to which many libraries contribute catalog records. <i>MARC</i> records are used by many libraries today to minimize the necessity for original cataloging.
<i>Modem</i>	<i>Hardware</i> that allows one computer to talk to another computer via the telephone lines.
<i>Mosaic</i>	<i>Software</i> developed for <i>Internet</i> browsing on the World-Wide-Web.
<i>Netscape</i>	Software by the creators of <i>Mosaic</i> in a commercial venture that allows one to retrieve documents from the World-Wide-Web system on the <i>Internet</i> . Orientation is definitely commercial
<i>Networking</i>	Communicating with colleagues to share ideas via email, snail mail, telephone or at meetings and thus creating a chain of interactions with numerous routes that cross, and interconnect.
<i>NREN</i>	The <u>N</u> ational <u>R</u> esearch and <u>E</u> ducation <u>N</u> etwork is a proposed national computer network to be built upon the foundation of the NSF network, NSFnet. <i>NREN</i> would provide high speed interconnection between other national and regional networks. The legislative bill that proposes <i>NREN</i> is SB1067.
<i>Online</i>	Refers to use of telephone line to access information with a phone, a personal computer and <i>modem</i> . Activities performed while one computer is connected to another computer such as searching an <i>online database</i> or taking part in an online discussion group.
<i>Optical Scanner</i>	Used with computers to digitize data without using a keyboard.
<i>Periodical</i>	A serial with an ongoing title that is issued regularly.
<i>PREVline</i>	<u>P</u> RE <u>V</u> ention on- <u>l</u> ine. An electronic information service of the U.S. Center for Substance Abuse Prevention dedicated to exchanging ideas and information concerning alcohol, tobacco, and other drug problem prevention.
<i>RADAR Network</i>	<u>R</u> egional <u>A</u> lcohol and <u>D</u> rug <u>A</u> wareness <u>R</u> esources. A network of

information centers organized by the U.S. Center for Substance Abuse Prevention.

- Reference Collection* Directories, encyclopedias, handbooks, indices, bibliographies, *databases* and other materials used to answer questions. Printed reference materials are usually non-circulating in libraries.
- Selection tools* Reviews and information about new books, documents, *software* programs, videos etc.
- Serial* Any publication that is part of a series. It is usually published several times a year at regular intervals. Each part is called an issue and all the issues for one year comprise a volume.
- Serial Record Book or Database* Records subscription information about *serials* regularly received and the issues that have arrived.
- Server Computer* A computer that makes services and/or files available on a network.
- Shelf File Box* Plastic, cardboard or metal file box that protects, displays and organizes pamphlets, reports, periodicals and other soft covered materials.
- Telnet* A computer program that allows users to remotely login to other computers across the *Internet* .
- Software* A computer program that tells the computer *hardware* what to do i.e. word processing, *database* creation or other.
- Technical Services* All library activities used to acquire and organize materials in contrast to user services. Technical services include cataloging, classification and acquisitions.
- Thesaurus* A selected vocabulary used by those in a particular field such as substance abuse to organize and retrieve materials. A *Thesaurus* may also provide an overview or map by arranging the words in a hierarchy and relating them to each other. It provides a *controlled vocabulary* for consistent indexing and more effective searching and retrieval of documents.
- URL* Uniform Resource Locator. An address that tells where to find files, and other resources on the *Internet* . Examples:
- WWW* : <http://www.cobb.com/index.html>
 Gopher: <gopher://gopher.psi.com:70/>
 FTP: <ftp://rtfm.mit.edu//pub/usenet-by-hierarchy/alt/answers/index>
 Telnet : <telnet://locis.loc.gov/>
- Usenet* A global network on the *Internet* of computer discussion groups on

thousands of topics.

<i>User Services</i>	All library functions developed to serve users including circulation control services, inter-library loan and reference services.
<i>Veronica</i>	A very large searchable index of items available in “Gopherspace” (using Gopher software on the <i>Internet</i>). Veronica catalogs millions of pieces of information from thousands of Gopher servers. However, it searches only filenames and menu titles.
<i>Vertical Files</i>	Pamphlets, brochures, newspaper clippings etc. filed in folders and stored in file cabinets. Used in libraries to provide up-to-date information and to supplement information in the catalogued collection. Materials in the vertical files are not cataloged and are discarded regularly.
<i>WebExplorer</i>	IBM software used to browse WWW. Used with OS/2 Warp.
<i>Weed</i>	Weed a collection. The process of evaluating materials in the collection with the goal of discarding outdated materials so as to make space for new and more useful materials.
<i>WWW</i>	World-Wide-Web. A hypermedia-based system that allows users to access resources available on the <i>Internet</i> .