

The Cairo Genizah: a Medieval Mediterranean Deposit and Modern Cambridge Archive

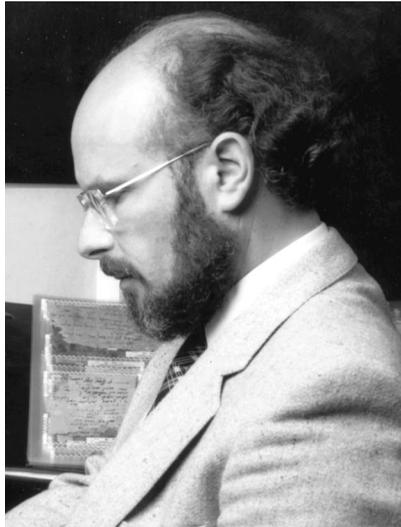
Stefan C. Reif

Stefan Reif of the University of Cambridge is Director of the Genizah Research Unit and Head of the Oriental Division at the University Library, Professor of Medieval Hebrew Studies in the Faculty of Oriental Studies and Fellow of St. Johns College. His major fields of research are Jewish liturgy and the Cairo Genizah and he is the author of seven books and of over 200 scholarly articles. His most recent two volumes are *Hebrew Manuscripts at Cambridge University Library* (Cambridge, 1997) and *A Jewish Archive from Old Cairo* (London, 2000). Professor Reif may be contacted at the Genizah Research Unit, Cambridge University Library, Cambridge, UK (e-mail: scr3@cus.cam.ac.uk).

[Mr Reif's paper was delivered during the 66th IFLA General Conference and Council, Jerusalem, Israel, 13-18 August 2000.]

Amassing the Genizah

The earliest occurrences in Hebrew literature of the root *gnz*, from which the word *genizah* is derived, are in late sections of the Hebrew Bible, where it refers to the



storage of valuable items. The root, of Persian origin, is attested not only in Hebrew and Aramaic but also more widely in Semitics, with the meanings of hide, cover and bury. In the rabbinic literature of the first few Christian centuries, it carries similar senses and is used to describe special treasures stored away by God, such as the Torah and the souls of the righteous. In Jewish religious law, which proscribes the obliteration of the name of God on the basis of its interpretation of Exodus 20:7 and Deuteronomy 12:4, *genizah* describes the removal from circulation of some item that is or has at some stage been regarded as sacred, whether legitimately or illicitly, and is now ruled inappropriate for ritual use. Such items may include controversial religious texts, materials once used in worship, capricious transcriptions of the four-letter Hebrew name of God (tetragrammaton), or artifacts about whose sacred status there is unresolvable doubt. As Jewish law developed and synagogal ritual became more institutionalized, it

became customary for communities to set aside a *bet genizah*, or simply *genizah*, into which could be consigned Hebrew Bible texts that were damaged or worn, as well as other *Hebraica*, including works regarded as heretical, that contained biblical verses or references to God. There they would await the natural process of disintegration.

In antiquity and in the early medieval period, it is likely that *genizot*, or what would in today's world constitute precious archival collections, were amassed in many areas of Jewish settlement. It appears that some communities made matters secure by burying the unwanted texts in the ground, while others removed them to caves or tombs, sometimes storing them first in suitable vessels. It is even possible that the Qumran (Dead Sea) Scrolls represent just such a *genizah*. Sadly, however, the survival rate of such *genizot* has not proved impressive, the ravages of time and climate on the one hand and the vicissitudes of Jewish history on the other, either ensuring a return to dust, or denying later generations adequate knowledge of where a search might even commence. Fortunately, however, in the case of medieval Cairo (=Fustat), the first stage of consignment into the synagogue *genizah* appears not to have been followed by removal to a cave or burial place, with the result that the study of Jewish history and literature has been greatly enriched.

The long survival of the Jewish community on the same site in Fustat; the dry climate of Egypt; the central importance of the city to Muslim and Jewish history for a number of centuries; and the reluctance of the Jewish communal leaders to take any action in the matter of its *genizah*, other than to expand its contents with all forms of the written word: all these factors contributed to the survival there of a

collection of some 210,000 fragmentary Jewish texts that is at least as significant as the Qumran Scrolls. Generation after generation appear to have arranged the collection from homes and institutions in and around Cairo of texts that were no longer to be circulated, and thousands of them were consigned to the genizah of the Ben Ezra synagogue.

In a move that was to make its collection unique in terms of world culture and history, the community of Fustat chose to preserve much of the written word that passed through its hands, regardless of its religious status. There thus came to be amassed all manner of ephemera that had more to do with the daily activities of ordinary folk than with the ideology of rabbis and scholars. In an age that certainly predated the concern for the preservation of archives, the explanation for their behavior may be that they saw Hebrew letters, or even any texts written by or about Jews, as either intrinsically sacred, or bearing a degree of holiness because of the frequent occurrence there of references to God, the Hebrew Bible or other religious subjects. The peak of this archival activity, if it may anachronistically be described as such, was reached between the 10th and 13th centuries, precisely when the community reached the zenith of its social,

economic and cultural achievements.

Some texts from what became known as the Cairo Genizah were sold by synagogue officials to dealers and visitors in the second half of the 19th century. Famous libraries in St. Petersburg, Paris, London, Oxford, New York and Philadelphia acquired major collections but it was Solomon Schechter who obtained communal permission to remove 140,000 items to Cambridge University Library in 1897. The Genizah texts are written in various languages, especially Hebrew, Arabic and Aramaic, mainly on vellum and paper, but also on papyrus and cloth. They represent the most important discovery of new material for every aspect of scientific Hebrew and Jewish studies in the Middle Ages. As a result of the conservation, decipherment and description done for over a century, but particularly in recent years and at Cambridge, previous ignorance has been dispelled and theories drastically modified. Among the subjects that have benefitted substantially are the emergence of Hebrew grammatical systems; the development of synagogal lectionaries and of translations and interpretations of the Hebrew Bible; and the literary history of such sectarian works as the Damascus Document and Ben Sira. Major impacts have also been made on the textual

and exegetical study of Talmudic, Midrashic, liturgical and poetic literature, and on the evolution of Jewish religious law. Knowledge and understanding of Karaism, of Fatimid Egypt and Crusader Palestine, of special Jewish languages such as Judaeo-Arabic, and of daily activities in the Mediterranean area have also expanded greatly.

The Early Hebrew Codex

It is important to note that it was a change in how Jewish culture was transmitted in the early medieval period that led to these literary achievements. Although the number of complete Hebrew codices that have survived from the ninth and tenth centuries is still only in single figures and their content predominantly biblical, the evidence of the Genizah leaves little room for doubt that many of its fragments originally belonged to codices of various types of literature. The Hebrew codex apparently made its appearance in the eighth century, perhaps under the influence of Islam, which had borrowed the medium from the Christian and Classical worlds. The contents of scrolls were copied on to bound volumes (codices), to which later generations added their own notes. Such codices began as no more than a few folded leaves but eventually evolved into substantial volumes with many folios. By being committed to a written form in these codices, oral traditions acquired a new degree of authority. The centralization of the Jewish community under Islam and the high degree of literacy made possible the wide distribution and acceptance of such texts.

Where there are sets of volumes, there is inevitably a need to store and exchange them. It has indeed recently been demonstrated that in the Jewish communities of North Africa in the ninth and tenth centuries texts were being widely copied and circulated and that extensive libraries, covering various languages, were being amassed and sold. Such libraries included not only the classical Jewish sources



Early blockprint wood-cut. Egypt, late 14th century. Or. 1080 J50

but also the newest commentaries on the one hand and more general learning on the other. They were actively built up by individuals, sometimes businessmen rather than specialized scholars, and by communities, through gifts, appeals and purchases, and they were made available for academic use by students and for ritual use by congregants. By creating, copying and disseminating the contents of these libraries, the Maghrebi Jews of means introduced a wide variety of literary works to other communities and thereby exercised a powerful influence on the levels of Jewish cultural achievement.

The impressive contents of the Cairo Genizah are in no small degree due to the arrival there of many Jewish refugees from Tunisia and to the transfer of the bibliographical riches of the North African communities to the Egyptian centre. Book lists are also a common feature of the Genizah discoveries and demonstrate the existence of reference literature for educational activities by the community. Bibles, prayer books, talmudic texts and commentaries, Jewish legal and theological tracts, as well as scientific, medical and philosophical works, are among the items that are regularly listed, sometimes in the context of a public sale. It is remarkable that a bibliophile, who was having a bookcase made, prepared a delightful text in praise of such an item of furniture and its educational importance, with the apparent intention of having it engraved on the front. Equally remarkable is the fact that when the Egyptian Jewish community raised funds in the 12th century for the ransom of Jews who had been captured by Crusaders in the Holy Land, they also made arrangements to pay the conquerors for the safe return of Jewish books.

Muslims, Christians and Jews

Given the dominant Islamic environment in which they lived, it is not surprising to find that the Arabic language played a major role in

Jewish life and that Jews built and furnished houses, wore fashionable jewellery, and pursued general commercial and cultural interests much in the same way as their Muslim neighbors. They even visited each others homes on the occasion of religious festivals. The interchange of religious ideas sometimes produced parallel developments, as, for instance, in the matter of the adoption of mystical ideas similar to those of the Sufis, while at others it created an opposite reaction, as, for example, in the defense of Jewish interpretation of Scripture or Jewish religious philosophy against non-Jewish challenges.

As far as their status in Islamic society was concerned, Jews and Christians were dhimmi peoples, that is, tolerated monotheistic minorities living under the protection of Islam, and as long as they agreed not to give offense to Muslims by any pretence at equality, they could, when the Muslim rulers tended towards tolerance, enjoy a reasonably good lifestyle. The Jews simply paid their special poll tax, wore their distinctive Jewish clothes, built no synagogues higher than mosques, and went about their ordinary business. There were occasionally times when rulers decided to take a maximalist position. A national leader might object to the existence of all non-Muslim houses of worship; local leaders might ban Jewish ritual slaughter, demand more taxes, or refuse access to water wells. In the reign of the Fatimid caliph, al-Hakim (996-1021), the Jews of Cairo compiled a chronicle (*megillat misrayim*) in which they praised him for saving them from the mob and from judicial execution on tax charges but it was that same ruler who ordered the destruction of all the synagogues and churches, and whose troops engaged in an orgy of murder, rape and plunder in Cairo and Damascus. Generally, however, a productive blending of various cultures was the dominant theme, particularly during the Fatimid period, from the 10th to the 12th centuries.

It is now clear that Muslims, Christians and Jews in the East did not

live intellectually ghettoized lives. They were aware of each other's texts and traditions, sometimes recording these in their own languages and literatures, and at other times subjecting them to criticism and even derision. In a religious debate with Rabbanites and Karaites conducted at the end of the 10th century, the Fatimid vizier, Ya'qub ibn Killis, a convert from Judaism to Islam, cited the content of the prayer book of Sa'adya ben Joseph in order to heap ridicule on the Jewish liturgy. Although there was the occasional romantic tryst between a man and woman of different religious allegiance, intermarriage was not a phenomenon of the time. Conversion, however, certainly was. Just as in Christian Europe, there were Jews who were so anxious to climb the social and political ladder that they felt constrained to convert to the dominant faith. Some of them made life difficult for their former co-religionists while others retained a certain sympathy for them, even engaging them in religious dialogues. But the movement was not always in one direction and there are accounts of Muslim and Christian anger at conversions to Judaism. The records of rabbinical courts make reference to approaches made by non-Jews wishing to throw in their religious lot with the Jews. As was the talmudic custom, they were initially rebuffed but there were a number, some of them women, who were determined enough to repeat their applications until they were finally accepted and even married into the Jewish community. One convert missed only one thing from his former life: the Jews could not make bread like the non-Jews!

Jews in Palestine

The Genizah discoveries have illuminated what were once the dark expanses of Palestinian Jewish history and revealed how the Jews of the homeland conducted their personal, public and intellectual lives in the centuries immediately before and after the Crusader invasion that began in 1099. It turns out that the Jews were encouraged to resettle

Jerusalem after the Arab conquest of the seventh century and that, despite the difficult economic conditions and political upheavals brought about by competing Muslim claims to the territory, communities grew and flourished. Fragments relate to Ramla as the capital city and to the havoc wreaked there by the terrible earthquake of 1033, to Tyre and Acre as busy sea ports, to Tiberias as a centre of Torah and textiles, and to Ashkelon as a particularly strong fortress. It was perhaps as a result of the earthquake that part of the synagogal premises of the Palestinian Jews in Ramla was still in a state of ruin in 1039. To obtain funding for repairs and maintenance, the leaders leased part of the property to a private individual, Sedaqah, son of Yefet, at an annual rental of half a gold piece. There were of course even more miserable times. During the first half of the 11th century, for instance, letters refer to the battles between Bedouin insurgents and the Fatimid rulers and provide gruesome details of the robbery, rape and crippling overtaxation.

Later, Jews fought alongside Muslims in a desperate effort to defend the Holy Land against the Christian attacks and, when they failed, those unable to flee suffered massacres or capture. As some eye-witness accounts relate, major fund-raising efforts had to be made in other Jewish centres to pay the ransoms demanded by some Christians for the release of Jewish prisoners. Those who did escape made their way northwards to the cities of the Lebanese coast or southwards to Egypt and many documents testify to their resilience in maintaining their traditions and their identity for two or three centuries. Contrary to what was previously thought, there was a significant Jewish presence in Palestine during the Crusader kingdom. Although only a few Jews lived in and around Jerusalem, there were active and sometimes even prosperous communities in the other cities. Following the recapture of the Holy City by Saladin in 1187, Jews rebuilt their community there and, although their situation remained

precarious, they were strengthened by the arrival of immigrants from western Europe. The deteriorating situation in England and France in the late 12th and early 13th century, coupled with the spiritual attractions of settlement in the land of Israel, encouraged a number of eminent rabbis and their flocks to make this ideological emigration, or *'aliyah*.

The 20th Century

We may now turn from medieval Egypt to modern Cambridge. Since more than 100 years have passed since Solomon Schechter brought back his famous hoard of Hebrew manuscripts, we may now take stock of the achievements of each generation of librarians and scholars. The century may be divided into five fairly self-evident periods. The first, that of Schechter and his contemporaries, was undoubtedly enthusiastic and industrious and the foundations were laid for much subsequent research. The University Librarian was highly cooperative and much involved in arranging the conservation and research and a team of scholars and librarians set to work on about 30,000 items (the Old Series) in the Collection. There was then a steady move away from institutional interest to individual research and while Cambridge University Library concentrated on other work and on surviving the First World War and the Depression, the centre of Genizah research moved elsewhere, in one case taking some 251 borrowed fragments temporarily with it! A binder's assistant was the only one at the University Library with any significant knowledge of the Genizah material and one of the librarians even suggested that the remaining 110,000 pieces should have been burnt years earlier. In the years just before and just after the Second World War, the oriental staff situation improved and this led to more interest in the Genizah material, with individual scholars and consolidated research projects making the running and attempts even being made by some Library staff to keep

an account of the growing number of publications about the Genizah manuscripts. These efforts, to a large extent inspired by the expansion of academic Jewish studies in the newly established State of Israel, culminated in the great expansion of the 1950s inspired by S. D. Goitein, and the sorting of over 40,000 fragments in the New Series. The Faculty of Oriental Studies and the University Library formally recommended in 1960 that funds be sought for the appointment of a mature scholar as an Under-Librarian who would arrange for the sorting, identification and cataloguing of the Collection; and would record all published work relating to it. He would also arrange for visiting scholars to contribute their areas of expertise to the cataloguing programme; and would initiate and manage a plan that would bring credit to the University and to its Library and which would signal a service to Hebrew scholarship. Insufficient funding was forthcoming for the complete project but it did prove possible in 1965 to appoint the first full-time librarian with responsibility for the Cambridge Genizah material who also dealt with queries and visitors, and began to catalogue the biblical fragments. Additional boxes were appended to the New Series, the microfilming project made good progress, material was added to the Library's record of its published Genizah items, and the steady stream of researchers working on the Collection continued unabated. Even more importantly, a project was commenced properly to conserve some of the Collection.

The final period, that of the past 27 years, has seen its own special developments. Since 1973, a fully comprehensive programme of work on the Collection has been conducted in the context of a newly created Genizah Research Unit. The remaining 32 crates of unclassified material were sorted in 1974 and 1975 into the Additional Series under a variety of subject headings. With the assistance of external funding, the microfilming and conservation of all 140,000 fragments was completed in 1981. A busy team of researchers catalogued

about 65,000 fragments, and some 50,000 published references to Cambridge Genizah items were located and published, with the help of a special computer programme. Cambridge University Press joined forces with Cambridge

University Library to publish 12 volumes in the newly established Genizah Series. Young researchers, visiting scholars, international cooperative projects and major exhibitions became features of the Units work. Over GBP 1.3 million

was raised from outside sources in support of the Units projects and information about Genizah research was conveyed to the wider public through a regular newsletter, *Genizah Fragments*, the media, and the Internet.

Now Available from IFLA Headquarters!

Collecting and Safeguarding the Oral Traditions

Collecting and Safeguarding the Oral Traditions : an international conference / edited by John McIlwaine and Jean Whiffin. - The Hague: IFLA Headquarters, 2000. - 150 p. 30 cm. - (IFLA Professional Reports ; 68). ISBN 90-70916-80-0

This Professional Report can be ordered for NLG 45* from:

IFLA Headquarters
P.O. Box 95312
2509 CH The Hague
Netherlands

Tel. +31-70-3140884
Fax +31-70-3834827
E-mail: karin.passchier@ifla.org



*Plus NLG 25 handling charges

The Influence of the Electronic Library on Library Management: A Technological University Library Experience

Nurit Roitberg

Nurit Roitberg is Director of the Technion Central Library (Elyachar Library), at Technion-Israel Institute of Technology, a positions he has held since 1979. Her main activities involve introducing uniform working procedures within the 20 Technion libraries; computerization of the libraries; and the development of the electronic library which is accessible via the campus network.

Ms Roitberg can be contacted at the Elyachar Central Library, Technion-Israel Institute of Technology, Technion City, Haifa 32000, Israel (fax: +(972-4)8233501; e-mail: roitberg@tx.technion.ac.il).

[Ms Nurit Roitberg's paper was delivered during the 66th IFLA General Conference and Council, Jerusalem, Israel, 13-18 August 2000.]

Introduction

The reorganization of the library in order to adopt new techniques and to incorporate the electronic library is sometimes called re-engineering. This term expresses the feeling of a



revolutionary era, changes in attitudes, entrance to new technological areas and building a new library system based on virtual collections. However, unlike the original definition of re-engineering, which means that the new system replaces the old one, the traditional library is not abandoned or neglected, but continues to develop side by side with the electronic library. The library continues to purchase and catalogue books and to provide services to readers who personally visit the library. The combination of both the traditional and the electronic services is called today the hybrid library.

Manpower and the Electronic Library

The new tasks are not equally divided according to the old scheme and the additional workload for developing and maintaining the electronic library does not always fit into

the existing order. Some tasks are related to traditional library departments and some are new. In general, the electronic library is adding many additional duties to the present team.

Licensing electronic journals is strongly connected to the serials department, but it is a labor-intensive and time-consuming job. Linking the electronic journals to the library homepage is a new task that nobody did before. Readers services are provided not only personally, but also by electronic means today. This includes technical support in addition to bibliographic services. New databases and e-journal collections must be checked constantly by librarians as to their contents, format and methods of linking. This is a wearisome task. It is followed by preparing written explanations and messages to readers about new services, and giving group instructions on how to use the electronic library. In fact, developing and maintaining the library homepage which becomes the heart of bibliographic work, requires a lot of effort in planning, writing texts, and technical work.

Working in a state of continual change means dealing constantly with new missions, new technologies, new partners to compete with and constant pressure to proceed and not to be left behind. Changing library priorities and strategic planning is one thing; performing all duties with the same team becomes the problem.

Administratively many libraries are still organized according to the old system, which is based on traditional departments such as acquisitions, cataloguing, serials, etc. Employees feel secure within this administrative framework since many of them have a tenure status and other privileges. Duties and hierarchy are usually well defined in this system.

It is difficult to change the old hierarchy and duties and it is not desirable to do so unless it is necessary. There is a strong justification for the traditional library organization, but a flexible and dynamic solution is needed for the areas that are affected by constant change. Here, what is suitable today may not be appropriate tomorrow. Libraries do not yet have enough experience to define and measure all new tasks related to electronic library duties. Some new duties may develop into a new department and some may vanish after a while when a special task is completed. Therefore, only a different approach will enable the library to cope with the new duties without dramatically changing the administrative manpower organization of the library. The solution should not be a part of the old hierarchy, but it can be an addition to it. The library can create a parallel scheme in which librarians should be treated on an individual basis rather than according to their place and duties in the traditional hierarchy. Special tasks can be given as personal assignments to people with qualifications, ability and enthusiasm to do more and to take part in new and advanced developments. It appears that responsibility for a mission in the area of the electronic library is a reward in itself because of the professional interest, the esteem of the library's management and the personal pride of achievement.

The prerequisite to such an approach is an appropriate organizational surrounding with new values. The creation of the correct culture demands investing efforts in employees' education, learning new techniques and constant updating. Most libraries do not get enough additional manpower, if at all, to compete with new duties related to the electronic library. When they get additional manpower it is invested first of all in technical duties that require skilled engineers, etc. Most of the work required for the transition into the electronic library areas is done by the existing library team. The computer or the PC with its basic software is an essential tool, and librar-

ians should improve their ability to use it constantly. The combination of experienced librarians well trained in modern technology with personal responsibility to individual or team missions is the key to success and progress.

The Technion-Israel Institute of Technology is a technological university and a research institution located in Haifa, Israel. It has a central library and 20 departmental libraries, operating as one bibliographic unit. The electronic library is being developed and maintained by the Central Library for the whole campus.

At the Central Library senior librarians voluntarily took personal responsibilities that were not in their areas of responsibility. The head of the book cataloguing department is linking e-journals to the library homepage; the head of the book acquisitions department prepares for licensing e-journals; the heads of reader services, cataloguing and acquisitions serve as the library homepage editorial team; the information specialist classifies e-journals; the reference librarians take part in various tasks in the development of the electronic library. Even the secretary is involved in updating information related to electronic items.

It was not planned so, but developed as a result of a continuous process which began with raising problems, discussing them with library senior staff and trying to find practical solutions with the present manpower. The discussions included topics such as problems related to improving the homepage and electronic services to the departmental libraries, cataloguing e-journals, the linkage between the library catalogue and the library homepage, technical problems related to the library integrated system, to local databases and more. Many issues were solved in a creative and efficient way; some are still not solved. Also, some mistakes were made and corrected as part of this process. The most important outcome was the sense of partnership and shared responsibility of

the senior team and the feelings of shared success and professional pride.

Librarians at all levels are encouraged to participate in courses that improve their computer capabilities. Such courses are organized for librarians, sometimes together with other Technion employees, in cooperation with the Technion manpower division. In-house lectures on special technical subjects are given from time to time to the librarians by the technical staff of the Central Library.

The Library as a Leader

Libraries' management already know that they must adjust themselves to a situation of constant change. The pace of development is influenced strongly by factors outside the library: many new databases and new e-journals are offered frequently in the market, sometimes in more than one interface and much research is required before reaching a decision regarding new products. There are long periods of preparation for the implementation of a new version or a new library integrated system and then it takes time to absorb it. Library hardware should be updated as a result of technology advancement, new Web-based university teaching materials should be accessed and combined in the virtual library, and user education is required on a larger scale and in various forms.

Library directors are also under a lot of pressure to achieve goals much faster in order to compete with others in the information world. Electronic information management has become prestigious, and in order to lead in this area the library should take initiatives and enter into new projects if they are related to its services. The Technion Central Library became a specialist in networked information, mainly in giving diverse unified services to all users of the campus network.

However, today there is much more knowledge and professional ability

in the libraries to control the faster pace of development and to direct it according to their needs. Many libraries have already proved their competence in dealing with new technologies and with the virtual or electronic library. Libraries can act today from a standpoint of power rather than be dictated to by others. Today, the status of the university library is higher at the university and in the eyes of the information vendors. As a result the library can much more influence its development pace and directions. Of course, this status is acquired by investing much continuous work, thoughts and planning and by making mistakes and correcting them.

Many libraries have reached a position of leadership. Leadership means more chances to proceed towards future goals as the library sees it. The library should make all efforts to keep this position by using vision as an administrative tool. This means encouraging new initiatives and ideas brought up by the library staff, and trying to create the future, instead of being led by others.

These opportunities are available now as a result of the electronic library development, and on the basis of the achievements of university libraries until now. Not only has librarianship changed into a modern profession on the cutting edge of technology, but libraries have used their traditional cooperation to create powerful consortia. Universities' management cannot ignore the impact of change brought by libraries to the academic community. Libraries are now experts in networked information, and as a result they can influence other related areas.

At the Technion, it was decided to change the technological approach towards videotaped basic courses. The courses are available now on video cassettes which can be watched via stand-alone television stations in the audiovisual library. It was decided to move to DVD technology and link the information to the campus network using a special server. The Central Library was

asked by Technion management to take responsibility for marketing the audiovisual collection in its new form. The filmed lectures will be available on the campus network via the library homepage.

The Central Library is also using its influence to convince the appropriate Technion authorities that a uniform set of rules is needed when putting teaching materials on the Web. The practical experience gathered by watching the pattern of use at the library computer-cluster serves as a tool for identifying additional needs of students other than traditional bibliographic requirements. The electronic library cannot be separated from a wide range of other aspects related to teaching.

The library should always be aware of future developments and be part of them. By ignoring them the library may lose new developments to competitors within the institution.

Centralization versus Decentralization

The old debate between centralization and decentralization is now definitely weighted in favor of centralization. In the age of virtual information there is no meaning to the physical location of the information, but there are great advantages, financial and bibliographic, to unifying and incorporating distributed systems.

Libraries need stronger power to succeed in their negotiations with the vendors of electronic information. Sometimes the vendors themselves prefer to sell e-information to larger bodies. The rebirth of consortia in its modern frame is a direct result of this process.

The problem of decentralization is usually an institutional problem. While libraries are ready to cooperate on a national or regional level, they find it much more difficult to do so on an institutional level. Cooperation in the electronic area means much more than interlibrary loans and coordination of acquisitions.

It sometimes means losing independence. Progress depends much more on centralization than on cooperation. However, cooperation is a positive tool to achieve centralization. In a distributed university library system, electronic databases and e-journals should be purchased only once and placed on the university network with access for all readers. In reality efficiency is not the only motive; prestige counts too and departmental librarians would not give it up easily. A major issue is who controls the library homepage and other centralized computerized bibliographic systems in a decentralized university library system. Voluntary cooperation among libraries on the campus can solve only part of the conflict. An official centralized management of the electronic library can ensure that the financial investments involved in developing the electronic library will be used efficiently to the benefit of all university users.

At the Technion, for example, there are 20 departmental libraries. There is a long tradition of cooperation among the libraries, and the technical services (acquisitions, budget control, cataloguing, classification, interlibrary loan) are centralized. Cooperation worked well for a long period. The Central Library took leadership in computerizing the traditional services of all the Technion libraries. The departmental librarians understood the benefits of the computerized system, added their local demands and as a result all the Technion libraries have one computerized catalogue and one readers file. As readers services were based mainly on the paper editions, the departmental libraries enjoyed the prestige of providing an important service to their readers.

At the beginning of the 1990s stand-alone databases on CD-ROM were introduced in some libraries. Networking was the next stage. The Central Library took the initiative and put the major databases on the campus network.

Networked CDs were not the desired solution for the campus net-

work. CDs can be accessed by PCs only via the campus Novell network. There were problems with other types of computers. In the mid-1990s when Internet technology was made available, the Central Library decided to use it as the backbone of its bibliographic services. The library homepage was created and databases were linked to it using an IP number for identification with no need for ID or PW. All Technion computers could reach the services via the campus network. When e-journals started to appear, the Central Library did not allow any private arrangement between a departmental library and the vendors. The Central Library made the licensing arrangements for the entire Technion and linked the journals to the central homepage. Links were made between the homepage and the central catalogue. Attempts were made by departmental libraries to develop independent homepages. The Central Library encouraged them for local faculty purposes, but not as parallel systems. The departmental libraries' homepages are linked to the main library homepage which is a part of the Technion homepage and represents the complete electronic library.

In order to prevent decentralization of the electronic collections, and to ensure that the electronic library will serve all campus users, the Central Library has been officially appointed to manage the electronic library. Most e-journals and bibliographic databases are paid from the Central Library's budget. The Central Library represents the Technion in the Israeli University Libraries Consortium.

Technical Support in the Library

The volume and level of computerization in modern university libraries, together with the library's responsibility for services via the campus network, dictates a more independent approach to the area of technical support. Relying on outside technical assistance or on the

university computer center services is a partial solution. Although the situation is different in various institutions, the trend is towards more independence of libraries in maintaining their networked information services. In fact university libraries serve as the technical centres of the electronic library.

A university library today has a large number of workstations. At the Technion libraries there are 300 workstations and the number is growing. Most or all staff members are working with PCs and readers' services are also based on them. Advanced libraries have created computer clusters for readers' use. Maintaining and upgrading such a large amount of equipment demands constant work. In addition, there are servers and communication equipment. The servers located at the library are related to library information systems or sometimes to the integrated library system. At the Technion Central Library there are five servers for different purposes related to local databases, the library homepage and for backup. The library's computer which is used for the "Aleph" integrated library system is located at the computer centre because of historical reasons. In order to operate all the systems efficiently, the library should have its own technical staff: an engineer or a technician. The library staff needs an immediate address when faced with technical problems, and library problems are the first priority for the library engineer.

The communication issue is a most important one. Library services are based on the campus network, which is usually maintained and developed by the university computer centre. The connection between the university library and the university computer centre is based first of all on network definitions and network activities. At the Technion the library proxy which is the gateway to remote databases and e-journals is maintained by the computer centre. Continual coordination is necessary and should be done by a professional person from the library side.

In addition to the equipment and communications mentioned above, the library maintains a large homepage, gives technical help to departmental libraries, assists network users, develops software solutions for problems not solved in the library integrated system and more.

In large decentralized library systems like that at the Technion, a continual dialogue is needed between the Central Library technical staff and faculty engineers in regard to problems related to the departmental library equipment.

In the past, the library relied much more on the computer center services and one or two experienced librarians who served as coordinators. Later when the level of computerization in libraries progressed, the lack of enough technical knowledge became a barrier for further development. The Internet opened new possibilities, staff members acquired more knowledge and techniques. In order to widen the library networked services and invest more funding in it, the level of technical maintenance must be assured.

The need for an engineering department in the library is a result of the development of the electronic library. This need is much more defined than other new tasks resulting from the electronic library. Once the library hires its own engineer, a wider range of opportunities are opened for improving electronic services. Librarians can rely upon a higher level of technical solutions. As the development of library computerized services continues there is a demand to solve more technical problems. In larger library systems, one person is not enough and gradually more staff will be hired for the engineering department.

Future Possible Changes

The changes in library management and manpower organization are highly affected by the development of the electronic library. It is difficult to predict the character and pace of change of the electronic

library, but these factors will determine the future of library organization.

As a result of the present achievements of the electronic library, the interlibrary and document delivery department already requires less manpower as more material is available via the network to the end-user. On the other hand, the serials department maintains two parallel systems, the print and the electronic. When electronic versions

will totally replace the paper editions, a considerable workload will be reduced in the serials department, but online access to the back volumes is still a major unsolved problem.

The vision of a library with very few librarians does not seem realistic. The library will still need its professional staff, but they should be prepared to move from one field to the other, or to incorporate additional duties frequently. Higher

qualifications and constant updating are essential for efficient work in the future library.

Electronic information is not less expensive than printed information. On the contrary, larger investments are needed. Libraries realize the benefit of cooperation and the number of consortia is growing. The electronic library is becoming more and more a part of the virtual campus, and is being integrated with virtual instruction.

New Gold Corporate Partner

IFLA is very proud to announce that **netLibrary** has joined IFLA as a Gold Corporate Partner

As the world's premier provider of electronic books (eBooks), netLibrary helps academic, public, corporate, and private libraries create a richer, more productive learning environment for their patrons. By combining the time-honored traditions of the library system with electronic publishing, netLibrary offers an easy-to-use information and retrieval system for accessing the full text of reference, scholarly, and professional books.

For more information about netLibrary, please have a look at www.netLibrary.com, or contact Mr. Mike Dale at:

NetLibrary Inc.
3080 Center Green Drive
Boulder, 80301 Colorado
USA
Tel: +(1)(303) 415 2548
Fax: +(1)(303) 415 0468
E-mail: MDale@netlibrary.com
WWW: www.netlibrary.com



Curriculum for "Social Information Science" – Evaluation and Application

Shifra Baruchson-Arbib

Ms Shifra Baruchson-Arbib is an associate professor in the Department of Information Science in Bar-Ilan University, Israel. She was head of the department between 1990 and 1998. During this time, she promoted the specialties of "Information Studies" and "Library Administration" and founded a new expertise for MA students, "Social Information Science".

Ms Baruchson-Arbib holds three degrees: BA in History, Bible and Information Science, MA in History and PhD in History. She specializes in the history and sociology of reading, printing and the information society, in social information, as well as in bibliography and data retrieval.

She has published many articles and two books on the above subjects. Her first book, *Books and Readers; the Reading Interests of Italian Jews at the Close of the Renaissance* (Bar-Ilan University Press, 1993) was awarded the prestigious Zalman Shazar Prize - named after the president of Israel. Her second book, *Social Information Science - Love, Health and the Information Society - The Challenge of the 21st Century* (Sussex Academic Press, 1996) suggests founding a new specialty in Information Studies that will educate new "Social Information Scientists" who in the future will enlarge the social role of the library and, in addition, build modern social and medical information banks.

Ms Baruchson-Arbib is a member of the editorial board of the Israeli journal "Information and Librarianship". She is also a member of the Ministry of Education committee for promotion of library education in Israel, as well as a member of IFLA and FID.

Ms Baruchson-Arbib can be contacted at the Department of Information

Science, Bar-Ilan University, Ramat Gan 52900, Israel (e-mail baruchs1@mail.biu.ac.il).

[Prof. Baruchson-Arbib's paper was delivered during the 66th IFLA General Conference and Council, Jerusalem, Israel, 13-18 August 2000.]

Introduction - What is Social Information Science?

Social Information Science is a new specialization in the framework of information studies and librarianship. It deals with the study of applications and development of



all the elements connected to the retrieval and processing of social and medical information, including the study of society's information needs, the characteristics of data retrieval sources, data processing methods, the ethics of providing information, the development of institutions such as social and medical information banks, and the creation of the new professional: the Social Information Scientist. This discipline was developed by the author as a special expertise for MA students in the Department of Information Science in Bar-Ilan University, Israel. The theoretical and scientific basis of the subject was covered at length in her book: *Social Information Science - Love, Health and the Information Society - The Challenge of the 21st Century* (Sussex Academic Press, Brighton, 1996).¹⁾

The basic assumption behind the need to develop this new field is that in addition to the technological

efforts and inventions that characterize the information society, we also need to develop the humanitarian and social aspects of the new society emerging before us. In a pioneer article about electronic publishing (1978), T.H. Nelson noted: "The paper world we lived in for so long may and perhaps should be supplanted by an electronic counterpart. But in this transformation, we have a chance to improve the world - a one time chance." ²⁾

The basic premise of the new field is that modern man needs two types of social information for his well-being: (1) direct information, such as: names of institutions, public and voluntary aid organizations, support groups, information on medical treatments and preventive medicine, etc.; and (2) supportive knowledge - meaning the knowledge and information found in literature, movies and poetry, from which one can draw comfort, support, insight, a new way of looking at problems, and original solutions found and tried by others. Social and medical information, when transmitted in a reliable and empathetic manner along with detailed explanations, will give modern man emotional and social stability, and reduce stress as much as possible.

Just as in the 20th century new academic disciplines have been established (e.g., psychology, criminology, educational guidance counselling, business management, computer sciences and others), now, at the threshold of the 21st century, it is important and worthwhile to create a new profession appropriate to the spirit of the times and the needs of society. The 20th century put man's social needs on the stage of scientific research. The 21st century should continue to find solutions for these needs by using new technology and new information channels to give man an anchor that will enable him to take responsibility for his life, to be involved in decisions affecting his life and to choose his best options. During the last 20 years, we have witnessed a growing awareness of this subject through the rise of new issues and projects such as: patient education, preven-

tive medicine, the establishment of medical information centers in hospitals, and the development of referral services in public libraries, all of which prove that there is a need for social and medical information.³⁾

The concept of using information and literature for the benefit of society is not new, as proven in the fields of bibliotherapy and psychoneuroimmunology.⁴⁾ In addition, there are a lot of different social, practical activities that are not sufficiently known to the general public.⁵⁾ What then is the innovation in the new field of Social Information Science? First, its interdisciplinary approach, which combines three elements: information technology, literature (in printed and electronic form) and the public's need for social and medical information; second, its application in library science as a unique expertise with the purpose of educating a new generation of qualified, responsible Social Information Scientists. As responsibility and credibility are essential in such a delicate field such as social information, creating a formal and recognized profession will prevent the penetration of nonprofessionals into this field.

The Conception of the Bar-Ilan University Programme

The official purpose of Social Information Science is to create institutions called social and medical information banks, and a new professional - the Social Information Scientist, as the author explains in detail in her book (1996). The process of the entry of a new profession into society involves slow stages of trial and error. This phenomenon was taken into consideration during the development of the programme. It was also clear that transforming the librarian into a Social Information Scientist will not be an easy task in light of the librarian's conservative image and low library budgets. On the other hand, it is obvious that public and school libraries should look for new

challenges in wake of the decline of reading books and the expansion of new information technologies. Taking all these assumptions into consideration, the Bar-Ilan University programme has three aims: 1) the training of new librarians (Social Information Scientists) for hospitals, nursing and rehabilitation institutions; 2) educating specialists to develop self-help sections and social information banks in public and school libraries, community centers, and local municipalities; and 3) the encouragement of talented students to develop private initiatives in the field of social information. It has been explained from the start to all those who register for the programme that this is a new field and that there is no Social Information Science profession in Israel yet.

The Information Science Department in Bar-Ilan is the largest department of its kind in Israel (550 students) and its aim is to promote new fields in order to help Israeli society become an advanced information society. Social information is one of its new projects, in addition to other programmes: Information Management, Information Science, and Administration of Public and School Libraries.

Curriculum for Social Information Science

The programme began in 1993 as an MA specialization and includes two options:

1) Programme with a thesis (27 credits including 2 seminars); and
2) Programme without a thesis (37 credits including 3 seminars). Students with BA degrees in librarianship were exempt from taking the introductory courses (13 credits). The programme lasts 2-4 years. Only outstanding students with BA degrees in the social sciences were accepted.

The new specialization is based on an interdisciplinary approach and is built on four components:

1. Basic courses in information science and librarianship (data

- retrieval, cataloguing, classification, etc.);
- 2. Basic courses in psychology: "Introduction to Psychology" and an introductory course in group dynamics;
- 3. Study of the therapeutic aspects of all kinds of communication media: books, poetry, movies, Internet sites, etc. (bearing in mind different age groups: children, adolescents, adults and senior citizens); and
- 4. Studies of the potential applica-

tions of the new specialization in existing frameworks such as schools, public libraries, and libraries in hospitals, nursing and rehabilitation centres, as well as in new frameworks such as management of new social information banks.

The following is the programme curriculum. Please note that each year there are some changes made according to lessons learned during the course of the previous year.

Introductory courses: 13 credits

<u>Name of course</u>	<u>Credits*</u>
Introduction to information science	1
Introduction to computers	1
Research methods and statistics	2
Introduction to reference work	1
Cataloguing methods	1
Classification methods	1
Computer services in libraries	1
On-line data retrieval	2
Internet resources	1
Marketing of information services	1
Organizational behaviour	1

**Specialization: Social Information Science
Required introductory courses: 4 credits**

Introduction to psychology	2
Group dynamics	2

**Specialization courses: 8 credits required for thesis programme;
17 credits for non-thesis programme**

Library services for special populations	1
Medical bibliotherapy in health care institutions	1
Literature and movies as means of support and insight	2
Bibliotherapy for senior citizens	1
Bibliotherapy for children	1
Advanced course in bibliotherapy for senior citizens	1
Bibliotherapeutic evaluation of children's literature	1
Data bases in the social sciences	1
Social information in social services	1
Evaluation of reading abilities	1
Basic skills of the Digital Information Scientist	1
Copyright and ethical issues	1
Elective courses on other subjects	4

**Required seminars: 2 credits for thesis programme;
3 credits for non-thesis programme**

Social Information Science	1
Scientific research in librarianship	1
Information systems in educational institutions	1

* 1 credit = 30 hours of learning = 1 semester.

**Evaluation and
Application - Data
and Methods**

After six years of activity, it is time to evaluate the success and practical application of the new field. From the point of view of the department, it is a success. During all these years, from 20-25% of the students have chosen this specialization despite the fact that it has been made clear to them that this is a new programme and there is no guarantee that they will find jobs at this stage. Most of the students have chosen the programme without a thesis since it offers a greater selection of credits, a fact that allows them to obtain widespread knowledge in other areas of information as well and will enable them to find jobs in the future in various places.

What is the academic profile of the students? Ninety-nine percent of them are women between the ages of 30 and 50. They all have BA degrees in the social sciences - education, psychology, social work; some of them also have teaching certificates and a BA degree in librarianship. From a professional point of view, most of them are already working: 30% as librarians and the rest as educational counselors and teachers. It was natural for students with a tendency to aid and support to choose this specialization.

In the middle of 1999, a survey was conducted among the students who had already completed the programme in order to evaluate the satisfaction from the programme and its success in the field of employment. The survey focused on four central questions: 1) What motivated the students to register for this specialization; 2) Did the studies influence their awareness to the social aspect of library science and their attitude towards readers; 3) Are they working in the field or have they developed at their places of work special projects such as: self-help sections in libraries, information centers for social services, preparation of a bibliotherapeutic

catalogue, preparation of a self-help literature catalogue or social Internet site?; and 4) Do they have private or public plans to apply it in the future.

The main findings of the survey follow. The survey was sent to 150 students and 73% of them responded. Most of them (52%) answered that they chose the specialization because it is a new and interesting field. Some of them (19%) responded that their work deals with related topics and their purpose is to develop social information activities within their libraries. Twenty-nine percent of them responded that they intended to learn a new profession and apply it in Israeli society.

Concerning their awareness of the subject, most of them (75%) said that the course expanded their awareness of the social potential of library science and improved their attention to readers' requests. Others (19%) responded that they had previous knowledge. The rest did not respond (6%).

Concerning the central question dealing with the practical aspect, we learned that 17 students (15% of the respondents) are involved with activities related to the new field. Here the answers were very varied and interesting. Four graduates work as teachers in this field. One, who was a member of the first graduating class and is a physician by profession, is now teaching courses in medical bibliotherapy, bibliotherapy for senior citizens and social information in social services, in our department at Bar-Ilan. This student also has a background in psychology and is also active in Israel in aid and welfare frameworks. The second graduate teaches bibliotherapy for children in the department; she is a librarian by profession with an MA degree in education. She also specialized in bibliotherapy within other frameworks as well, and now also teaches courses to kindergarten teachers on the subject. The third is a librarian by profession who teaches an introductory bibliotherapy course, as a special extension course for

librarians. The fourth, who holds a senior position in Israel in the field of library science, incorporates the subject of social information into her lectures. Two other respondents developed self-help sections for youths within the framework of school libraries. One of these projects, that took place in the town of Or Yehuda, was studied carefully and it clearly showed that this special self-help section contributed to an increase in the amount of reading and heightened interest in books dealing with teenage family problems, drugs, violence, sex, and others.⁶⁾ Two students are jointly building an Internet site on the subject of "breast cancer" for an Israeli association for prevention of breast cancer; they received funding for the project from the Ministry of Education. Another respondent, also a leading figure in the field of librarianship, prepared a "literature catalogue" classified according to bibliotherapeutic angles for the Central Library of Tel Aviv. Another respondent built a site for her library and added information on bibliotherapy. Four graduates are now developing databases in the framework of their jobs in libraries and government projects on the subjects of drugs, information services for senior citizens, television movies - and social values. Yet another graduate is involved in developing a municipal information center in one of the central libraries. Two other graduates are involved in bibliotherapy counselling - one with disabled army veterans, and the other with elderly stroke victims, both under the supervision of psychology experts.

Concerning their plans for the future, 46% responded that they intend to develop the field within the framework of their working place or in a private framework. What about academic research on the subject? Besides articles that were published by the author of this paper, many seminar works have been written in addition to several excellent MA theses, for example: "Bibliotherapy and hypermedia", "Self-help Literature in Israel 1967-1997", "Research in bibliotherapy - in Israel and the world

- Bibliometric analysis", "Social Information in schools for special education", and "Alternative medicine in Israel and the world - Bibliometric analysis".⁷⁾

In addition to the direct results connected to the students of the department, there has also been increased interest in the subject among Israel's librarian organizations. The author was invited to give several lectures in the framework of The Instruction Center for Public Libraries and the Organization of Special Libraries, as well as in the framework of an international conference for school librarians held by the International Association of School Librarianship in 1998. Recently, the leading organization dealing with adult education and the development of community centers has been considering developing social information banks in a community center in Israel.

Conclusions

There is no doubt that the issue of social information should be developed and promoted as part of the changes characterizing the information society. But, like any new activity just beginning, the first stages are slow and it takes time for awareness to grow among scholars as well as the general public. From the point of view of library and information workers, this is a new field of activity, one of great interest and creative potential that in the future will allow the development of social information banks and academic specialists who will serve as certified Social Information Scientists. The very fact that there is so much interest in the subject among library students shows that they are looking for a new and interesting niche to develop in and to contribute to society. However, in the practical sense, development is slow because of lack of budget and lack of awareness of the issue. In this state of affairs, the activities carried out until now are noteworthy, and with a lot of patience, creativity and the right connections, we hope that Social Information Science will accelerate and contribute a human-

istic angle to the technological innovations of the information society.

References

1. See also: Baruchson-Arbib, S. "Hilf Durch Bücher in Medizinischen und Sozialen Einrichtungen in Israel." In: *Int. Gedenkschrift Dr. med Edith Mundt-Bücher als Magische Medizin*, München Deutscher Ärztinnenbund, 137-144 (1996).
2. Nelson T.H. "Electronic publishing and electronic literature." In: Edward C. Deland (Ed.), *Information Technology in Health Science Education*, New York, London: Plenum Press, 213 (1978).
3. Brawley, E.A. *Mass media and human services: Getting the message across*. Beverly Hills: Sage Publications (1983).
4. Gold, J. *Read for your life, literature as a life support system*. Markham: Ontario: Fitzhenry & Whiteside (1990).
5. Such as the Book Buddies project in San Francisco and "The Happy Children's Ward" in Munich, and a lot of other small social information projects such as Internet sights and health data bases. See: Baruchson-Arbib, *Social Information*, Chap. 4.
6. Baruchson-Arbib, S. "Social information science and the school library, education for all." *Proceeds of the 27th International Conference of the International Association of School*

Librarianship, Bar-Ilan University, Israel, 1-7 (July 1998).

7. See above (ibid, notes 1, 6).

Bibliography

Adeney, C. *Bibliotherapie bei kleinkindern in krankenhaus* (Europäische Hochschulschriften, Vol. 418). Frankfurt am Main: Peter Lang (1990).

Baruchson-Arbib, S. "Information and supportive literature in aid organizations: The case of Israel." *Libri* 46: 168-172 (1996).

Baruchson-Arbib, S. "Libraries in senior housing in Israel: Findings of a survey." *Information and Librarianship* 22: 13-18 (1996) (Hebrew).

Baruchson-Arbib, S. "The self-help section in public libraries - The case of Israel." *Public Library Quarterly* 16(3): 41-49 (1997).

Baruchson-Arbib, S. "The public library and the problem of hospital libraries for patients - The case of Israel." *Public Library Quarterly* 17(3): 79-88 (1999).

Childers, T. *Information & referral: Public libraries*. Norwood, NJ: Ablex Publishing Co. (1983).

Gann, R. "Consumer health information." In: L.T. Morton & S. Godbolt (Eds.), *Information sources in medical sciences* (4th ed.). London: Bowker-Saur, 545-555 (1992).

Ellis, A. "The advantages and disadvantages of self-help therapy material." *Professional Psychology - Research and Practice* 24: 335-339 (1993).

Hunt, S. "The clinical use of self help manuals." In: J.M. Clarke & E. Bostle (Eds.), *Reading therapy*. London: The Library Association, 82-105 (1988).

Hynes McCarty, A. & Hynes Berry, M. *Biblio/Poetry therapy - the interactive process: A handbook*. Boulder, CO: Westview Press (1986).

Parikh, N. & Schneider, M. "Book buddies, bringing stories to hospitalized children." *School Library Journal* 35: 35-39 (1988).

Rees, A.M. *Managing consumer health information services*. Phoenix, AZ: Oryx Press (1992).

Rubin, R. *Bibliotherapy source book*. Phoenix, AR: Oryx Press (1978).

Rubin, R. *Using bibliotherapy: A guide to theory and practice*. Phoenix, AR: Oryx Press (1978).

Schneider, M. *Book buddies volunteers bring stories to San Francisco hospitalized children*. San Francisco Library (1987).

Tolsma, D. "Patient education objectives in healthy people 2000 - policy and research issues." *Patient Education and Counselling* 22: 7-14 (1993).

Vollhardt, L.T. "Psychoneuroimmunology: A literature review." *American Journal of Orthopsychiatry* 61: 35-47 (1991).

Collaboration between Theory and Evidence-based Practice – Two Cultures: Librarians and Professors

Judith A. Segal

Judith Segal is currently a full professor on the library faculty of Western Washington University. In addition, she consults on library strategic planning and team facilitation and is a bibliotherapist. For the past seven years, Ms Segal served as a library director, at Hollins College and WWU. This paper is developed from a chapter of her doctoral dissertation. She received her D.L.S. and M.L.S. from Columbia University, an M.A. from Brandeis University and a B.A. from Brooklyn College. Ms Segal may be contacted by fax at +(1-360) 6507996 or e-mail: judith.segal@wwu.edu.

[Ms Segal's paper was delivered during the 66th IFLA General Conference and Council, Jerusalem, Israel, 13-18 August 2000.]

Some years ago, I began an historical investigation of the record of activities, goals and accomplishments of an academic librarians' grassroots association,



the Library Association of the City Colleges of New York, called by its acronym LACCNY. Much held in admiration for reputedly winning faculty rank and benefits for its membership, I was eager to learn the way in which they arrived at such a glorious nationally renowned victory. As the archival record showed LACCNY's seemingly endless and repeated failed attempts, over 26 years, to attain the association's primary goals of academic recognition and parity for its membership, my document searching turned into analytical probing. I knew that this evidence of record, in contrast with legend, replete with questionable practice by the association needed theoretical explanations. Why the failing tactics, why the unchanging efforts, indeed in light of its insignificance, what was its *raison d'être*? I was urged on by Michael Winter, who, in *The Culture and Control of Expertise*, said: "Sequential history, no matter how carefully documented, is not sufficient; chains of events must be placed in patterns of ideas, which come from several sources."¹

For 26 years, from 1939 to 1965, LACCNY, the Library Association of the City Colleges of New York, vigilantly, consistently and, alas, ineffectively, sought teaching faculty salary and rank parity for its academic librarian members. Although, in the end, the librarians were given what they wanted, it appeared that it was not because of LACCNY. Rather it was an accommodation to the needs and resources of the 1960s. In fact, had LACCNY paid more attention during the lost decades to social, political and economic external events and to values and trends that affected the fabric of higher education, and planned accordingly, the truly mistreated librarians might have reached their goal in less time.

Why study external events when what you want seems to lie within four walls in an office building in a city struggling with its own needs? Looking closer, though, we see, in those 26 years, a succession of national traumas and change: the United States entered the Second World War and came out of it to endure hard-hitting waves of inflation and recession; unionization and collective bargaining rose forcefully as a national movement while the Cold War raged at home and a hot war in Korea threw the American politic into a reactionary sweep of the nation for Communists; for twenty years, political fear enforced political complacency until newly growing disenfranchised groups discovered their power and used public demonstrations and civil disobedience to draw attention to their unmet needs.

LACCNY, it would seem, paid scant attention in the 1940s, its early years, both to the city's dichotomous commitments that included stabilizing its huge post-war fiscal burdens while maintaining loyal adherence to free higher education. Neither is there evidence that, as an organization, it was particularly

aware of the impact of the diverse and eccentric profiles of the students attending the colleges.²

Through the 1950s, the smallness of the association's size along with librarians' traditionally recumbent politics and, above all, their reliance on reasoned appeals, would bring them defeat time and time again.

They did win some battles, the most important just before they formally became an association. In 1938, the founding members gained recognition of the college libraries as college departments rather than civil service operations. From that victory, and some eight years later, as a benefit of their departmental status, their members gained voting rights in campus-wide bodies. Their major and sometimes ally, the Legislative Conference of academic faculty, vigorously fighting for the professoriate, did help them raise a salary ceiling or two in 1943 and 1946. But those gains and those faculty privileges did not largely affect overall salary ranges, enable advancement, promote collegial acceptance or their recognition as peers of the faculty.

The record is as full of the many stated and written protests, briefs, reports of LACCNY's leaders appearing at councils of more powerful bodies on and off campus and in government as much as it is empty of the benefits of such efforts. The librarians' varied academic backgrounds and qualifications left room for the city, state and campus administrations to pay them less and assign them longer working hours than the rest of the teaching faculty and justify placing and keeping them in categories least expensive to maintain. Their main goals, parity in title, work hours and work year as well as, and most importantly, salary were not gained through the careers of a generation or more of hard-working librarians.

Then it was 1965 and the goal was achieved. There came the Consultant, the angel of driven administrators seeking an elusive prize

whose need must be convincingly expressed in the language of boards. Chancellor Albert Bowker of the City Colleges, which by 1965 had become an amalgamated University, was keenly aware of one thing - the need for more librarians. He was not particularly aware of their talents, their values, their education, or their collegial dilemma, but he knew that there were fewer than could meet the need of the expanding city campuses of the 1960s. To fill positions, in a buyers' market, he also knew he had to raise salaries. To do that he needed the approval of the Board of Higher Education. So Bowker hired Robert Downs, a known advocate of full faculty status and rank for librarians, also advantageously an outsider and an academic Dean. It was Downs' arguments and Bowker's use of it and the feared and growing movement for faculty unionization and collective bargaining that convinced the Board of Higher Education. Simply said, it would be easier to recruit librarians with increased pay and faculty rank.

It was Chancellor Bowker who created the machinery that enabled the Board to adopt a resolution crafted by LACCNY seven years earlier, born out of a wistful dream 20 years before that.

To portray LACCNY as ineffective is not to dishonor or discredit its membership and its dedicated leaders, but to emphasize that the impact of the larger social context is the predominant source of individual response, not the virtue of associations or the correctness of their arguments and beliefs. It is also to point out that a group bent on changing response needs to engage politically, armed with a strong knowledge base of its culture and context, built on self-studies and mastery of administrative aims, important referral groups, current political and economic issues and government timetables; its representatives need to be skilled in the art of negotiation and of compromise. For as Sayre and Kaufman³ describe it, political life is a contest involving competitors and prizes, core groups and satellites.

Repeatedly, LACCNY focused not on winning but on due process and reasoning. It had neither a strategic plan for achieving its goals nor a political action plan for adept use of lobbying, advocacy and public relations. It did not seek to attract or involve other groups that could gain benefits from the larger effort. LACCNY members did not appear engaged in political life, not even as having a consciousness of itself in its social context. The city college libraries in those years, as William Myrick, Jr. shows, in the only other in-depth study of them, were unable even to coordinate their collection building and borrowing and could only barely cooperate with each other.⁴

"Curiouser and curiouser," as the saying goes, and as I researched the record of the association, the history of the colleges, the era and its events and people, I asked myself numerous times why did LACCNY's membership keep growing and its activities remain unchanged for so long despite its failures? Theory comes into play here.

There were the studies of occupational sociologists, Harmon Zeigler⁵ and Robert Zussman.⁶ Zeigler, observing the associations of teachers, found them guardians of the status quo, not agents for change; in the days before the National Education Association (NEA) and the American Association of University Professors (AAUP) became more active, teacher associations, similar to LACCNY, provided a place for its members to remain together in nonpolitical alienation.

Zussman's study of engineers likewise revealed an apolitical group which he attributed to their entrenchment in mid-level professionalism. Their goal was security in an increasingly insecure society. Dramatic or political involvement in the life beyond their communities and offices was not advisable.

The teachers and the engineers, like the librarians, appeared to construe activism as planning local activities, not change. These sociologists called them alienated claiming that

alienation begets alliances of the alienated, not for assimilation, but for maintenance. The alienated have a hard time influencing the powerful as long as they remain in their alienation.

The most instructive theories were those of Albert Meister⁷, a Swiss sociologist, and student of associations. Meister theorized that in times or places where people would be anxious about rightfully belonging, their need for security is heightened. They seek the shelter of an association which then is primarily compelled by its members' emotional needs. Its importance to them, and their loyalty to it, depends more on the perceived security and support it offers than on the successful accomplishment of its stated goals.

Then, as now, an association forms out of the belief that it can make a difference in matters involving power and control. Yet change in society is complex and resisted by existing systems of values and operations. LACCNY's 26-year grievance was fostered in a spirit of increased personal expectations, out of the shadows of the Great Depression which, for some time, continued to bite at the heels of growing prosperity. In theory it should have fought like a union and planned like an organization to realize its goals of radical change. In practice, it was a small group, afraid of social activism, cautious, idealistic, and mired in the complacent values and rhetoric of its time including slow, cautious, persistent efforts to influence legislation through relentless but polite lobbying.

When louder social action and grander battles for civil rights became more acceptable, even LACCNY members talked among themselves of work actions; head librarians dared to relay to their college presidents dire administrative dilemmas with regard to overwork and understaffing. They were, however, consistent in not linking their cause with the causes of others, did not affiliate or derive any policies from organizations not sanctioned by city and campus administration.

The approved group the librarians doggedly tagged was the Legislative Conference of the colleges' faculties because it was the one "approved" group. But, to that Congress, also slow and cautious, LACCNY's struggles were a continuous and seemingly insolvable dilemma that did not take precedence over its many larger concerns.

LACCNY might have served as a vehicle to promote union of librarians and teaching faculty. It did not. It did not publicize to the faculty its shared commitment to scholarship, knowledge building, publishing. Instead it argued for equality on the basis of its "teaching" activities. And LACCNY did not understand what "teaching" meant to academicians. The librarians equated their "teaching" with that of classroom instruction, viewing bibliographic instruction as equal to a developed theoretically-based curriculum. LACCNY held Institutes meant to be similar to academic conferences but their guest speakers were not librarians, were in fact, celebrities and popular idols; conference presentations and discussions were not officially recorded nor published in the academic literature.

And, again, why not? Surrounded by academicians and the literature of scholarship, they did not understand how the culture of academic librarianship significantly differed from the culture of academic in higher education. Across the nation, when teaching faculty wrested their power from boards and presidents, they moved from institutional loyalty to intensely competitive disciplinary groups. The professors' own social status, conferred hierarchically by rank and discipline, was guarded jealously with deliberately ambiguous peer control. The librarians did not weigh the pressure that the highly competitive academic world places for approval of its constituents based on their degrees, grants and publications. Entry alone into the discipline and acceptance by the group, almost without exception, required a doctorate and other scholarly accoutrements not in the general experience of the larger base of librarians.

According to Wilson Logan, the degree is important because it implies "research competency as well as specialized knowledge and general understanding, in contrast with technical proficiency"⁸ and Belle Zeller, the legislative champion for faculty rights in New York City, said "Let us face the fact that librarians are not considered as equals by their equals, and this is where librarians get caught up in a vicious cycle".⁹ Knowingly or unknowingly, librarians were not deemed the peers of the faculty.

Which brings us to the theory of "status anxiety" which historian Robert W. Doherty established as one thread to explore in historical interpretation: "[Since] few institutional supports for social status exist in nonaristocratic societies such as the United States, shifts in deference and authority produce anxiety in the minds of persons who belong to displaced sectors of society and also among those who have risen in position."¹⁰

During the time of this effort, were the librarians and or the teaching faculty evidencing "status anxiety"? Based on a report issued by an AAUP committee, during the depression years, it appears that the nation's economic stresses fostered campus community divisiveness between administration and faculty and among junior and senior faculty as well.¹¹ In the McCarthy era, Schrecker¹² showed a mirroring of the nation's fear and anxiety in academic circles as they accommodated to political repression.

We know that collective organization, historically, has been the resource of those who find themselves powerless. We now know, from Meister, et al, why LACCNY, as a voluntary association and not a union, formed to gain power, but remained powerless, surviving nonetheless. It did not become a union because of its members' general distrust of unions. It did not change its tactics because of its belief in the triumph of reason and those professional values that reveal disinterest in the mechanisms of power struggles and

power alliances. Not acting on Belle Zeller's recommendation that the Association educate the academics by producing a "profile" of the librarian, they made true her prediction "we will never dispel the myths that now prevail among our colleagues".¹³

From left field, we can bring in Paulo Freire,¹⁴ expert on political consciousness, for whom groups evolve politically first from general conformity, then to naïve reform and then, finally, to refusal of anything but that which assures them the power and recognition they deserve. LACCNY was stuck in the middle stage. Each of the association's decisions - to directly petition the Board of Higher Education, to entrust its future with the Legislative Conference, to defer to their superiors, to turn down external litigious defenders, to disdain the Workers' Defense League and the United Federation of College Teachers (UFCT) - was made absent a realistic analysis of its own place in the academic environment.

The rhetoric of librarianship differs from the views of the professoriate. Amitai Etzioni explores this bind. "[Librarians] most significant reference group is the university professor, who believes his mastery of his own field is superior...as is his knowledge of related areas. Nor does the average professor have the experience of being saved from a serious difficulty by the scientific knowledge of the librarian".¹⁵

LACCNY did not have the resources, know-how or sufficient support to attain its goals. It remained an intact association because it satisfied its generally apathetic membership with a sense of professional identity that promised security. Actual success or failure did not change the association's value; it was not organized for the only change it could make - self-change. It did provide a training ground in democratic due process, a peek at political workings, and a future for today's librarians still struggling with much of the same struggles. LACCNY's story is no longer a puzzle but an antiquated model from which reforming librarians must learn to enter the fray, recognize their image, get involved in changes, and wisely assimilate the larger values of academia.

References

- 1 Winter, Michael E. *The Culture and Control of Expertise: Toward a Sociological Understanding of Librarianship*. New York: Greenwood, 1988, p.146.
- 2 Aaron, B. as cited in Duryea, Edwin and Robert S. Fisk. *Faculty Unions and Collective Bargaining*. San Francisco: Jossey-Bass, 1973, p. 43.
- 3 Sayre, Wallace S. and Herbert Kaufman. *Governing New York City: Politics in the Metropolis*. NY: Russell Sage, 1960.
- 4 Myrick, William J., Jr. *Coordination: Concept or Reality? A Study of Libraries in a University System*. Metuchen, NJ: Scarecrow, 1975.
- 5 Zeigler, Harmon. *The Political Life of American Teachers*. Englewood Cliffs: Prentice-Hall, 1967.
- 6 Zussman, Robert. *Mechanics of the Middle Class: Work and Politics Among American Engineers*. Berkeley: Univ. of California, 1985.
- 7 Meister, Albert. *Participation, Associations, Development and Change*. New Brunswick, NJ: Transaction, 1984.
- 8 Wilson, Logan. *American Academics: Then & Now*. NY: Oxford Univ., 1979, p. 43.
- 9 Zeller, Belle. "The Academic Librarian: Collective Bargaining and Faculty Status." Conference on the Academic Librarian. New York State Department of Education. Syracuse, NY, February 27, 1975. Mimeographed report, p. 3.
- 10 Doherty, Robert W. "Status Anxiety and American Reform: Some Alternatives." *American Quarterly* 19 (1967): 329 -337.
- 11 American Association of University Professors. Committee Y. *Depression, Recovery and Higher Education*. NY: McGraw-Hill, 1937.
- 12 Schrecker, Ellen W. *No Ivory Tower: McCarthyism and the Universities*. NY: Oxford, 1986.
- 13 Zeller, p.4.
- 14 As cited in Modra, Helen M. "Political Literacy; A New Agenda for Library Education?" *Libraries After 1984 - Proceedings of the LAA/NZLA Conference*. Brisbane, 1984, pp.453 - 464.
- 15 Etzioni, Amitai, ed. *The Semi-Professions and Their Organization: Teachers, Nurses and Social Workers*. NY: Free Press, 1969, p.286.

The Information Right and the Information Policies in Latin America

Estela Morales

Estela Morales has been Director General of Academic Affairs at the National Autonomous University of Mexico (UNAM) since 1997. She has also held the positions of Academic Secretary of the Humanities Coordination, Director of University Centre of Librarianship Research, and Vice-Director of General Direction of Libraries, all at UNAM. She is currently involved in a project which will study information technology and social minorities, information in Latin America, and Mexico and its information production about Latin America. She has written on subjects such as library education; automation; and planning, new technologies, information and infodiversity in Latin America.

Ms Morales can be contacted at the Universidad Nacional Autónoma de México, Edificio C y D, 4o. piso, Circuito Cultural Universitario, 04510 México, D.F. Mexico (fax: +(52-25)56660256; e-mail: moce@servidor.unam.mx).

[Ms Morales' paper was delivered during the 66th IFLA General Conference and Council, Jerusalem, Israel, 13-18 August 2000.]

Society and Information

Information, as the representation of thought and knowledge, has led us to consider that society receives and is exposed to information from the language used by the



mass media as well as from the language generated by the literary, scientific and technical texts of specialized literature. In both cases society produces the information resulting in a conscious and unconscious interest of transmitting it individually and collectively. This strategic information may be available only to a select group or to everybody. It may be sought, needed and used by individuals or groups in power like the State, commercial partnerships or political groups. The participation of society is decisive in the process of generating and using information, and society is in charge of assigning it its value and function.

It is still thought that since information is generated so easily, it must be considered part of our natural heritage, as much as the forests, rivers, and the sea. Different ecologist groups have reported that this natural heritage is endangered, with measures being adopted to prevent its loss. We have thus

become aware of the cost to rescue it and preserve it. Such is the case with both oral and written information. We always believed that in as much as information is a required element in all our actions, no effort is involved in its production, access, organization and dissemination. However, the situation is very different. If we in Latin America fail to act and do not strive to acquire and deliver to our people the information needed for development, we will not be actually using it and this development will also become questionable.

Acquiring and organizing information is not enough. It is also necessary that it be available when required. Technologically we have all the facilities to make information available to all users. Nonetheless, securing information is not so simple because we cannot ignore political and economic restrictions, standardization deficiencies and the limitations imposed by groups in power such as censorship, filters and influences that have an impact on information in each process. Information can also be enriched or impoverished by the interpretation of those who select, analyze or summarize it, by those who assign descriptors and search for it in a catalogue or database as a technical aspect of their work or for the convenience of political systems, economic groups or simple marketing elements.

The Right to Information

Information is a response to the need human beings have of expressing themselves and learning what others have expressed. It is the response to a need that at a certain moment becomes an essential human right because, as free people, we have the right to express ourselves, to inform and be informed. This natural privilege should be guaranteed by the State

and defended by society. This right should also be considered as a whole. We must not only think of the creation of information and the manifestation of ideas and knowledge but also of its circulation, availability, use and interpretation.

As a result of the agreements reached in a meeting held in November 1995, UNESCO published a document in May 1996 entitled *UNESCO and an Information Society for All*, containing an educational, scientific and cultural project related to new information and communication technologies. One of the decrees of the General Assembly itself engages the participation of the UNO to promote the free flow of ideas by means of words and images. It also assumes the obligation of promoting international cooperation in communication, information and informatics in an effort to decrease the prevailing inequality between developed and developing countries. Regarding medium-term strategies planned for the years 1996-2001, there is special emphasis on the use of communication and information technologies in the service of development, democracy and peace.

This is the condition that will allow the information society to reach its ultimate goal: autonomy for each and every citizen by means of access to knowledge, and the ability to use it. The "information society for all" is both global and local, comprised of individuals and social groups which participate in the informational whole and contribute local information and their point of view to the information surrounding us.

Information Policies

To make the right to information come true, there must be a close relationship between society and the State, with mutual interactions so that, in the face of the approaching future, new behaviours, attitudes and values of global society may be taken into account, with an awareness of the strategic value of knowledge, information and

exchange in the development and democratization of Latin American societies.

The information policies we will establish will be closely related to the general policies of each country, with public policies pertaining to education and cultures, and the historical and social realities of the nation itself and the Latin American region.

The examples of information policies in Latin America are not necessarily all-embracing because it is possible to see partial efforts inter-related to the activities and products that enable the inhabitants of a country to use and read information. We have laws, agreements or State initiatives relevant to the policy a certain State has established in the public and cultural or information and literacy domain. There are also Acts from which policies on libraries, books, copyright and information resources and systems may be inferred.

Informatics Policies

Information technologies and networks today own new ingredients converging into information and its use. Information networks, equipment, programmes and systems exist because they transmit information while life in today's world is surrounded by information and the possibilities involved in approaching and acquiring knowledge. Although they are an essential part of information policies, countries and international institutions generally consider technological issues separately and deal with them as informatics policies. The following are some examples of the efforts in certain Latin American countries regarding information policies.

Mexico

Throughout its contemporary history, Mexico offers different examples of its attempt to consolidate cultural policies related to books and libraries as a means to make world culture available to its people.

Nonetheless, these policies have always been subjected to personalities who play an important part in the political and cultural life of the country, and are seldom translated into actions beyond the individuals' political term, their power domain and their decision-making possibilities. This at times is due to the lack of a legal framework and at others to the scarce continuity of actions, the joint planning of the educational process and the poor relationship between cultural projects and development plans in the government sector.

a) *The right to information*

This right originated in the Mexican ordinance as a consequence of the freedom of speech, considered one of the fundamental privileges of human beings and the essence of 20th century liberal ideology.

The 6th article of Mexico's current Constitution states that "The manifestation of ideas shall not be subjected to any judicial or administrative inquisition. If the attack to moral and the rights of third parties provokes a crime or threatens public order, the right to information shall be warranted by the State."

This article deals in fact with two aspects: firstly, the natural need of expression of human beings, and secondly, the preservation of the prerogative society demands from the State, engaging its compromise to warrant this exercise through the right to information.

b) *General Library Act*

The actions to guarantee the right to information should be simultaneous with the creation of mechanisms to guarantee its compliance and exercise regardless of the economic, social and political costs it may involve.

The General Library Act was passed on 21 January 1988, and is observed throughout the Republic, sustained on the objectives of the aforementioned programme. This Act declares free attention to anybody who wishes to consult library

material, and refers to public libraries as institutions that offer democratically book consultation services and other complementary cultural services enabling the population to acquire, transmit, increase and freely preserve knowledge from every domain and in any means containing information, while relating library policies to the National Plan of Development.

c) The Copyright Federal Act

The current Mexican Copyright Federal Act was published in the *Diario Oficial* on 24 December 1986 and is a compilation of editorial concerns, rather than those related to library users.

The concern to protect an author's copyright, the result of his intellectual effort, is among these that have materialized more as a policy for the intellectual and artistic world, propitiating an act and ordinance for the protection of this right. Nonetheless, just as public opinion is in favour of defending this right, it is also true that citizens themselves violate this law too easily, at times because of ignorance and at others by deceit. This situation has led to dangers which may work against the right to information, making the access to information and the possibilities to have and create knowledge considerably difficult.

The defense of an author's copyright is of interest to creators throughout the world and is positively accepted concerning formal aspects and the acknowledgment of authorship and bibliographical references. However, the intention to impose a restrictive use on information has been the object of study by high-ranking international associations that deal with information, such as IFLA and the International Federation of Documentation (FID), which have expressed their view about this and invited authors and publishers to accept the social role which libraries must play, as institutions that offer free information to different social groups. On the other hand, these associations require libraries and information

centres to make judicious and careful use of the reproduction means of original works and those received by electronic means.

d) The Book Act

Public policies concerning the culture of many Latin American countries, especially Mexico, acknowledge technological development and the power of electronic media, although books are still one of its main decisive elements. This is why legislation has been established to protect this tool and to promote its production, commercialization, and use.

Legislative attempts in this regard are actually derived from the interest publishers have to sell more books because this segment unfortunately measures reading rates in each country according to the number of copies of books they sell.

The most recent efforts to establish a book act in Mexico took place in 1996, as an initiative by the National Chamber of the Mexican Publishing Industry which proposed a project for the Mexican Book Act and Promotion of Reading (as yet not passed).

e) The Programme for Informatics Development

At a national level, this programme is found within the *National Development Plan 1995-2000* which considers informatics as a strategic element for national development because of its value as an agent that has had an impact on practically all domains and activities. Information in turn is considered inherent to the existence of human beings and societies in their search for knowledge.

The main goals of this programme are to promote the use and development of the informatics industry, fostering the creation of an informatics culture and increasing the network and equipment infrastructure. However, not all of this is linked to the origins of development, education and the indispensable use of information as a requirement for knowledge acquisition.

Some Experiences in Latin America

Latin America has new means to disseminate information and knowledge and therefore new possibilities to construct an information society with a Latin American personality where the State will promote and promulgate information resources.

Information policies in the area have been influenced by the guidelines of international institutions such as UNESCO, OAS, and IFLA which have worked on a constant basis to sensitize professionals and government officials. Highly developed countries in this domain have also been involved as technical and academic leaders and large producers of hardware and software programmes.

Several Latin American countries have attempted to create their own information policies; sometimes holistically organized and, at others, as individual efforts considered relevant at certain moments. Most importantly, however, are the already existing efforts which have marked the beginning of a coordinated action for national coverage that will enable each country and the region itself to live in an currently globalized world.

Argentina

In 1995, eminent professionals from the 1940s, such as Carlos Víctor Penna and Josefa Sabor felt the need to promote new efforts so that the Argentine Republic would have its own National Information System to implement previously defined information policies that would be useful for their country's development. They congregated young people in workshops and their efforts culminated in the plans for a project to legislate the creation of a Federal System of Library and Information Services.

The first workshop was held on 1 April 1995 with the participation of

information specialists who analyzed the document "National System of Library and Information Services" with the purpose to "[...] ensure that all Argentines, regardless of their schooling, geographical location in the national territory and their profession or activity, would have free access to bibliographical and documentary resources, notwithstanding their format, and without any kind of limitation [...]"

The final version includes a first chapter on national policies on library and information services, whose first article states that: *Citizenship participation in the development of a fully democratic Republic; the modernization of State institutions and private organizations; the right to information and knowledge for all Argentines; the concurrence of the country in scientific, cultural, financial and commercial segments; its incorporation to regional integration projects such as MERCOSUR; and the implemented plans leading to the improvement of the level of life of the Argentine people increasingly require an efficiently informed population for the Nation to reach its high objectives and successfully participate in the concert of nations.*

In April 1995, the final version of the preliminary plan to legislate the Federal System of Library and Information Services was delivered to the Cultural Commission deputies. At the time the Act for the Promotion of Books and Reading was already in Congress, with the objectives of fostering the production of books and essentially to disseminate the habit of reading. As of now, neither of these laws has been passed by Congress. The efforts reviewed here are at a national level, although in the provinces there are two examples of information policies and local systems already underway.

Colombia

This country has a long tradition in cooperative work related to infor-

mation, reading and libraries. Thanks to this and the growing publishing industry, Colombia has created efficient national information policies, having even in the 1970s set the groundwork for the National Information System. This system has mainly been supported by the organizations founded by administrative reform, such as the Colombian Institute of Culture (Colcultura), the Colombian Institute for the Promotion of Higher Education (ICFES), the Colombian Fund for Scientific Research and Special Projects (Colciencias) and the National Council for Science and Technology, all which have constituted an institutional basis at national level to promote information-related policies.

In 1973 the project for the National Information System was legally integrated to Colciencias and a year later UNESCO designated Colombia as a focal point of the UNISIST (Information System in Science and Technology). The goals of this System were consequently outlined: "to make the existing information resources in the country available to the national community by coordinating actions and the necessary resources, and developing a network of national libraries and information services [...]"

In 1988, Colciencias established basic guidelines for a national information policy, with the goal of guaranteeing the production, exchange, dissemination and use of information and knowledge to ensure its integration to national development processes in all its aspects.

That National Culture Plan (1992-1994) cites as a priority the creation and implementation of the National Information System in the area in an effort to articulate culture and education as the main axis for the country's development.

Costa Rica

This is the Central American country that has worked more systematically on the field of information,

advancing firmly towards the implementation of information policies to sustain public actions related to education and development. Although the National Information System was legally established in 1974, it has only been consolidated through sectional efforts, out of which those pertaining to science and technology are worthy of mention. In the 1980s the Science and Technology Ministry coordinated national activities for the development of a programme to advance scientific and technological development within the country. This required establishing four fundamental policies to constitute a National System of Science and Technology: the necessary resources, industrial reconversion, aggregate value and the popularization of science and technology. Noteworthy is the system's following objective: "The development and conservation of an information, statistical and documentation system in science and technology at the service of different segments within the country".

All the actions needed to develop a national informatics policy were compiled in the National Science and Technology Program (1986-1990) and in 1990-1994, underscoring the necessity to strengthen state and private information services.

Costa Rica has also had the goal to promote high-speed links by means of advanced communication technology among scientists from universities, institutes and research laboratories, technological component industries and national and other Central American corporations with colleagues and peers worldwide.

There has also been an interest in intellectual copyright and Costa Rica boasts an important tradition concerning the legislation of "Copyright Registration and Related Issues" and is now part of the Universal Copyright Convention. Its national policy likewise considers introducing children to the use of information and its technology. Steps have also been taken in public and university libraries to pro-

mote information access and use, and to practice reading.

Chile

With a similar tradition to other American Latin countries, Chile has also been interested in protecting authorship and has participated in the Bern and Paris Conventions on this subject. Decree 74, published on 21 July 1955, established compliance of the agreements reached in the Interamerican Copyright Convention for literary, scientific and artistic works, which were signed by the American Republics in an effort to perfect authorship protection. This action was completed with the decree published on 26 July 1955 where the Universal Copyright Convention was considered.

The content and coverage of these agreements were later enriched under Law 17336 on intellectual property, published on 2 October 1970, according to which the rights of both Chilean and foreign authors living within national boundaries are protected.

Chile is interested in book policies and similar information registers and has joined efforts and actions to allow for a more extensive policy that will benefit the publishing industry, the availability of reading material and the readers themselves. The Act for the Promotion of Books and Reading was made public on 1 July 1993 in a ceremony led by the President of the Republic. It is relevant to point out that besides protecting books from the publishing perspective with respect to piracy and illegal reproduction, this arrangement deals extensively with reading, the importance of books and literary creation.

The legal standards to protect computer programmes date from 1970 and 1971 (with their respective modifications, undertaken in 1972, 1985, 1990 and 1991, having the same objectives). Just like printed matter, authors of programmes have moral and patrimonial rights which are included in the Act of

Intellectual Authorship. Additionally, the adaptation and lawful and unlawful reproduction of programmes is specified.

Likewise, by means of the National Commission for Scientific Technological Research (CONICYT), the use of communication and information networks like Internet have been promoted to make this service available to Chileans, as well as giving them access to remote bases and all the information found on the Web.

Peru

Peru has not been an exception. Outstanding among the efforts to develop an official policy in the informatics domain are the ones undertaken in 1981, in which the Peruvian Association of Librarians and UNESCO, through its General Information Programme (PGI), organized a National Congress on Library Science and Information having as the main subject the lack of national information policies, the need for a national information system for development and, therefore, the definition of public policies. A preliminary project was also presented to legalize the organization and operations of the National System of Information for Development. This project privileged the role of libraries and considered that information in a developing country is dealt with and mainly transferred through these actions, thus collaborating with educational goals - an essential element in the plans for economic and social development.

After this project and other efforts undertaken in October 1993, national regulations of information policies were partially achieved through declaration D.S. No. 33-83-DE that, once established, regulated the National Library System, where the National Library was the main organization to which four main activities were assigned, with a number of other Directions: of School Libraries, of Public Libraries, of National Bibliography and of Authorship. All of this is

dependent on the Ministry of Education. The National Library was in charge of specifying and implementing policy to promote books and reading, while the other institutions had the responsibility of standardizing, guiding, coordinating, assessing and supervising actions inherent to their field, directing and offering technical assistance to the institutions involved in their field and participating in the establishment of library policies.

Venezuela

Owing to the work carried out by institutions and professionals related to books, libraries and reading, in 1976 the necessary resources were compiled for the creation on 9 September of the National Commission for the Organization of the National System of Library Services and Humanistic, Scientific and Technological Information, which depended directly on the Presidency of the Republic. This initiative considered humanistic, scientific and technological information as an indispensable resource for integral national development and, consequently, deemed the expeditious and efficient use of information by society as essential.

Fortunately, this measure did not remain on paper but was implemented by many actions to benefit information users (children, high school students, researchers, university students and the population at large), based on the leadership of the Autonomous Institute of the National Library and Library Services, the Book Bank, and the different information systems and networks, as well as on the interaction with providers of technology and other essential elements that currently enable the adequate use of information. In 1987 a seminar on National Information Policies was held in Caracas by the government of Venezuela, with support from UNESCO, to discuss the proposition of a national information policy and strategies for its implementation. This work was an effort to define policies linking information from national development, access to

information, promotion of national information, production and support for the efficient use of information, information technology and the development of human resources.

A Regional Effort

After this brief review of some of the actions that have been undertaken in Latin America, there is no doubt that, at least conceptually and in the different projects of each country, the importance of information is manifest in developmental processes. Nonetheless, the facts and general results in each of the cited examples do not enable us to conclude that the information has actually been used for decision-making and that the plans have been included in government programmes of the social, economic and political sectors. This is more notorious in the education segment where it is unforgivable to propose modalities involving a great physical and technological infrastructure without the informative component that leads to knowledge.

Accomplishments in Latin America regarding the development of national and regional information infrastructures are multiplying and have increasingly received more financial and political support. Likewise information is also increasingly mentioned and considered an essential issue in government programmes and projects in the different segments of the

national life in each of our countries.

Communication is not yet fluent from one country to the other within the region. This has led to the need to require information to a developed nation, alien to the area, to which a Latin American State had previously relinquished or sold its information, thus enabling the former to develop an informative product with aggregate value that it then resells at a higher price to the solicitor. Since this situation is still unsolved, the Regional Program for Strengthening Cooperation among National Information Systems and Networks for Latin America and the Caribbean (INFOLAC) has been underway since the 1980s, having striven since the beginning to find information for development. Based on the activities inherent to national systems and networks, as well as to regional networks, this programme has established ways to deal with problems of common interest as a whole which, because of their complexity and importance, could hardly be solved individually or particularly.

The driving force behind this programme is naturally information, considered as an economic resource requiring cost coverage for its transformation into a useful and precise element in intellectual processes related to decision-making. Many solitary efforts have been made in the region, but not all that are really needed--often beyond national

information policies. Because they are absent or have not been considered, this has become a task that must be dealt with if we want to lower costs and get more efficient final results in decision-making at national and regional levels which will ultimately be useful for the population at large.

Because as a programme it is still alive, although not very active as of late, its general purpose has been and is to strengthen autonomy and the individual and joint abilities of the national institutions in Latin America and the Caribbean to create and operate organization mechanisms and access to information resources, enhancing their use by establishing, implementing, assessing and managing their respective development plans, programmes, policies and actions.

The years have gone by and accomplishments have not been uniform in all Latin American countries. Some, like Mexico, Costa Rica, Venezuela, Colombia, Chile, Argentina, and Brazil, have been more successful. Nevertheless, advances have not been those required for the development needed in the region if our goal is to achieve something equivalent to what is found in developed countries, and if the interaction among governments, individuals and groups in a globalized world interconnected by telecommunications and the interactive flow of information is considered indispensable.

The Birth and Re-birth of the ISBDs: Process and Procedures for Creating and Revising the International Standard Bibliographic Descriptions

John D. Byrum, Jr.

John D. Byrum is currently chief of the Regional and Cooperative Cataloging Division at the Library of Congress where he has been employed since 1974. In his current position, he is responsible for the Library's cataloguing of materials from or about the Middle East and all of Asia as well as for serving as the Library's secretariat in support of the Program for Cooperative Cataloging.

Byrum was given the Esther J. Piercy Award in 1975 for outstanding contributions to technical services and the Margaret Mann Award in 1997, the American Library Association's highest honor in the fields of cataloging and classification. He also received the Library of Congress Award for Special Achievement, the Award of Meritorious Service, and its Award for Superior Service.

Byrum has been active in IFLA for more than two decades in various roles. He is currently honorary member the Standing Committee of the Section on Cataloguing and is completing a term as secretary to the Standing Committee of the Section on Bibliography. He was chair of the Working Groups which produced ISBD(CF) and ISBD(ER). Byrum has chaired of the ISBD Review Group since 1986. He has authored numerous articles on a range of cataloguing topics. Mr Byrum can be contacted at the Regional & Cooperative Cataloging Division, Library of Congress LM-535, Washington, D.C. 20540-4380, USA (fax: +(1-202)7076511; e-mail: jbyr@loc.gov)

[Mr Byrum's paper was delivered during the 66th IFLA General Conference and Council, Jerusalem, Israel, 13-18 August 2000.]

Before discussing the procedures by which the ISBDs are prepared and updated, let me provide some background information about this important IFLA initiative.¹



The ISBDs date back to 1969, when the Committee on Cataloguing sponsored an International Meeting of Cataloguing Experts. This meeting produced a resolution which proposed creation of standards to regularize the form and content of bibliographic descriptions.

As a result, the Section on Cataloguing put into motion work which ultimately would provide the means for a considerable increase in the sharing and exchange of bibliographic data. This work resulted in the concept of the International Standard Bibliographic Description (ISBD), which has now endured for nearly 30 years. In the view of many bibliographic experts throughout the world, the birth and maturing of the ISBDs have proved to be IFLA's most successful effort at promoting the cause of cataloguing standardization. Indeed, one might venture the opinion that in the history of cataloguing no other standard has enjoyed such a high degree of acceptance as that accorded to the ISBD concept. The indi-

vidual formats to which the ISBD concept have been applied are now used by bibliographic agencies, national and multinational cataloguing codes, and cataloguers throughout the world.

The first of the ISBDs to be published was the *International Standard Bibliographic Description for Monographic Publications (ISBD(M))*, which appeared in 1971. There have followed projects to produce ISBDs for Serials, Non-Book Materials, Cartographic Materials, Rare Books, Printed music, and, most recently Electronic Resources. For article level publications, *Guidelines for the application of the ISBDs to the description of component parts* was issued.

During the early years, especially in relationship to the first two ISBDs, that for monographs and that for serials, there was clearly lacking a consistent foundation for the program in terms of definition of data elements and specification of principles for bibliographic description across all formats. So, it developed that ISBD(S), for example, deviated from ISBD(M) in some basic ways; the most prominent difference was in their variant rules for recording titles and statements of authorship. As a result and to insure that the separate ISBDs would thereafter be harmonious in their treatment of data elements and prescribed punctuation, IFLA representatives met with the Joint Steering Committee for Revision of AACR2 to prepare the ISBD(General). ISBD(G) has provided a frame-work to which all ISBDs have been made to conform ever since.

Next there followed what might be called "the first general review project". To conduct this project, an ISBD Review Committee was formed. It first met in August 1981 and has been in place to serve as the IFLA Cataloguing Section's

Maintenance Agency ever since (although for a period of time its name was changed to the ISBD Maintenance Committee for reasons which will be explained below). Ultimately it was renamed the ISBD Review Group.

There were three major objectives set out for the first general review project:

- (1) to harmonize provisions, achieving increased consistency;
- (2) to improve examples; and
- (3) to make the provisions more applicable to cataloguers working with materials published in non-roman scripts.

In addition, two narrower objectives motivated this particular revision effort:

- (1) to review the use of the equals sign (as its use in bibliographic descriptions has been the source of some controversy); and,
- (2) to consider proposals regarding the ISBD for Non Book Materials emanating from specialist groups such as the International Association of Music Librarians (most prominent of which was to remove "machine-readable data files" as a format from this standard).

By the end of the decade, the ISBDs had been thoroughly considered, and they were re-published in "Revised editions". In addition, a separate ISBD was created for machine-readable data files, which appeared in 1988 as the International Standard Bibliographic Description for Computer Files (ISBD(CF)). However, because of the rapid advancements in technology, the need for revision of this ISBD quickly arose, resulting in the publication of the ISBD for Electronic Resources (ISBD(ER)).

In the early 1990s, the Cataloguing Section with the cooperation of the Section on Classification and Indexing set up a Study Group on the Functional Requirements for Bibliographic Records (FRBR). One immediate consequence of this development was the decision to suspend most revision work on the

ISBDs while the FRBR Group pursued its charge to "recommend a basic level of functionality and basic data requirements for records created by national bibliographic agencies." Also suspended to await the results of the FRBR study was a project then in progress to identify the components of a "Concise ISBD(M)" - that is, a standard setting out the minimal bibliographic features of an acceptable record. This project was put on hold because it was expected that FRBR's findings would in effect provide such a base-line. During this period, the ISBD Review Group became the ISBD Maintenance Group, a change of name reflecting a decision that it should deal only with ISBD problems that needed attention prior to issuance of the FRBR recommendations.

In 1998, the FRBR Study Group did publish its Final Report after its recommendations were approved by the IFLA Section on Cataloguing's Standing Committee.² At that time the ISBD Review Group was reconstituted to resume its traditional work. As expected, Cataloguing's Standing Committee asked the ISBD Review Group to initiate a full-scale review of the ISBDs. The objective of this "second general review project" was to ensure conformity between the provisions of the ISBDs and FRBR's data requirements for the "basic level national bibliographic record."

In the ISBDs, national bibliographic agencies are called upon to "prepare the definitive description containing all the mandatory elements set out in the relevant ISBD insofar as the information is applicable to the publication being described." To facilitate implementation of this principle, the ISBDs designate as "optional" those data elements which are not mandatory when applicable; in the case of particular ISBDs, a review of the Outline (consistently provided in each standard at paragraph 0.3) will reveal which data elements are optional. Therefore, the main task in pursuing the second general review has entailed a close look at the ISBD data elements which are mandatory to

make optional any which are optional in FRBR. (In no case is a data element mandatory in FRBR but optional in the ISBDs.)

The ISBD Review Group began by examining the *International Standard Bibliographic Description for Monographic Publications (ISBD(M))*, last revised in 1987. The changes which the Review Group proposed to make in the next iteration of this standard were posted on IFLANET. The availability of the proposal was widely announced on appropriate electronic discussion lists, and those with comments were asked to reply by July 15th. The Review Group considered suggestions received from several individuals, institutions, and cataloguing groups at its meeting held in conjunction with the August 2000 IFLA Conference. A draft revision has now been produced and will soon be posted to IFLANET.

In addition to this general review now underway, there are currently also underway special projects to revise the ISBD for Serials and the ISBD for Cartographic Materials. Although there are several goals being pursued, both projects are seeking to incorporate provisions to deal with electronic versions of publications within the scope of these two ISBDs. These two ISBDs will also need to incorporate the specifications for basic level national bibliographic records.

Thus, after 30 years, IFLA's ISBD program has yielded standards for representing bibliographic data for all types of library materials and maintained these standards through one or more revision processes. To make the ISBDs more readily available and to make them available at no cost, the ISBD Review Group has begun to convert the texts to machine-readable form for posting on IFLANET. Last year, ISBD(ER) was published electronically, and very shortly the ISBD for rare books and the General ISBD will be brought up on IFLANET. The Group is hoping that all the other ISBDs will be digitized and mounted later this year and next.

Meanwhile, the Review Group has asked the UBCIM Director to publicize an authoritative list of the "ISBD Family" on IFLANET, and this was accomplished in early 2000.³ In addition, UBCIM is soliciting through its regional offices information regarding translations of the ISBDs for the purposes of identifying for the public definitive versions available in languages other than English. So far, information regarding Dutch, Finnish, French, Hungarian, Italian, Latvian, Macedonian, Slovak, Slovenian, and Spanish language translations has been provided and can be accessed through links on IFLANET.⁴

Procedures are essential in all standardization work in order to ensure that the steps by which a document becomes a new or revised standard are well known and meticulously accomplished. The ISBDs are no exception to this rule. As a result, at the 1989 IFLA Conference, the Section on Cataloguing adopted a schedule and established procedures for development and distribution of such documents as new or revised ISBDs.

Normally, initiation or revision of an ISBD will result from work accomplished by a Working Group appointed by the Section on Cataloguing's Standing Committee - sometimes in cooperation with other IFLA sections. In view of recent developments, it is well to stress here that it is the Section on Cataloguing which enjoys "ownership" of the ISBD program. Other Sections or groups which would like to propose new or revised ISBDs are not free to undertake such ventures on their own: they need to begin the process by communicating recommendations to Cataloguing. In any case, where desired format expertise is available elsewhere in other IFLA sections or in other organizations, the Standing Committee will seek to establish ISBD projects jointly.

To initiate an ISBD project, Cataloguing's Standing Committee appoints a chair and the membership of a Working Group to take responsibility for it. The Working

Group is expected to generally conform with an overall schedule for the preparation, review, and publication of documents, which is set down at the beginning of every ISBD project. The time required to develop and revise the text will vary according to the complexity of issues to be resolved; normally projects take a minimum of two years to complete.

There are nine steps to accomplish between the start up and finish of an ISBD project.

1. Development of draft text
2. Duplication and distribution for worldwide review
3. Worldwide review and comment
4. Revision of draft text
5. Review by ISBD Review Group
6. Final revision
7. Duplication and distribution for voting
8. Voting by Standing Committee(s)
9. Final editing and publication of manuscript (print and electronic)

Regarding these steps, some further details are worth highlighting. First, any appointed Working Group is expected to work closely with the Director of the UBCIM Programme who is well prepared to help with the coordination of activities and provide procedural guidance. The Working Group is also expected to keep the Cataloguing Section and any other participating section well informed regarding the progress of their ISBD project. The membership of the standing committees sponsoring and participating sections participate in the worldwide review. In addition, also entitled to participate in the review are all association, institutional honorary and affiliate members of the Section on Cataloguing, and of any other sponsoring Section as well as members of the ISBD Review Group. Following the conclusion of a world-wide review, the chairperson of the Working Group, in consultation with the other members of the Working Group, is expected to consider all comments received and to revise the draft text accordingly. Nevertheless, the Working Group as a whole retains authority for deciding on the disposition of comments

and determining the contents of the resulting text.

Once the Working Group is satisfied with the draft, it is forwarded to the chairperson of the ISBD Review Group to review it for general conformance to the overarching ISBD principles and particular conformance to the provisions of ISBD(G). This step is necessary to provide consistency across the entire "family of ISDBs", so that bibliographic records for different formats can be efficiently processed and integrated when desired into single databases. The chairperson of the Working Group next prepares a final text. At that point the new or revised ISBD is ready for balloting. If the majority vote is affirmative, the UBCIM Programme Director proceeds to establish arrangements for publication, both for purchase in print and freely available in an electronic version on IFLANET. Although procedures allow for negative vote - in which case, the chairperson of the Working Group will consult with the Standing Committee to determine what course of action to pursue - such an outcome has never occurred.

The procedures were established more than a decade before the advent of electronic communications which have made possible conducting business more efficiently on the Internet. Today, as is well known, it is easy to dispatch even long documents almost instantaneously to colleagues throughout much of the world and to exchange correspondence without the considerable delays often encountered when using postal systems for international mailing. It is also routine to mount a document on a web site and to conduct professional exchanges as members of electronic discussion networks. Contrast the advantages of today's "instantaneous" flow of messaging with the inefficiencies of the "manual" mode in terms of standardization processes! Implementation of the ISBD procedures had proved quite costly; for example, more than 400 copies of the proposed ISBD for Electronic Resources, a large document, had to be photocopied and mailed to desti-

nations on every continent. In addition, because "snail" mail is often slow to reach its destination, the impact on the ISBD procedures resulted in six month periods for worldwide review for document delivery, evaluation, and return of comments. Even then replies often would continue to trickle in long after a particular group had finished evaluating the replies that were timely.

Thus, because of the economy which it provides, both in relation to postage saved and in terms of time saved in distributing documentation, the ISBD Review Group has become interested in modifying its procedures to take advantage of the Internet. This explains why the Group decided experimentally to handle the recent proposal to update ISBD(M) by using the web as the primary vehicle for conducting the worldwide review. The changes were posted prominently on IFLANET and their availability for study and comment was announced on IFLANET and several other electronic lists. Since the proposed changes were considered likely not to be controversial the Group decided to set the review period at four months. The ISBD Review Group was thus able to have in hand at its August 2000 meeting the comments resulting from this review and to make final decisions regarding them at that time. This experiment was judged a success!

As a result, the Review Group has decided that henceforth all ISBD origination and update work should make use of the Internet, although a general mailing to the section membership will offer to continue hard-copy drafts sent via airmail to any members who certify lack of connectivity to the Internet. New or changed ISBDs will be posted to IFLANET and also be available upon request for e-mail transfer as

textual attachments. The schedule for worldwide review will be adjusted to allow normally three to six months for study and comments. Early alerts will be posted to IFLANET and other e-lists so that groups could organize themselves for study and comment during the period allowed.

Thus, in this area, IFLA is undertaking to maximize the opportunities which today's technology offers by way of improving the interchange of information and views in its cataloguing standardization work. Not only will projects benefit from more timely development but also the technology will save considerable costs in terms of reproducing draft texts and purchasing their delivery.

Beyond these considerations, ISBD standardization procedures should be continuously reviewed to enable IFLA to maintain its cataloguing leadership, during what is now proving to be yet another transition period. Such standards as the ISBDs have guided the work of national cataloguing committees in updating their codes to foster internationally accepted practices. Today's publications patterns are changing, largely as a result of the electronic environment in which we increasingly function. As interest in metadata to promote control and access to electronic resources increases, the ISBDs will enjoy new opportunities to influence content and use of these schemes, since most of them will define data elements already familiar to the ISBDs. On the other hand, not only are there new bibliographic situations to consider, but not every bibliographic practice already in place continues to be as useful now as it was formerly.

The Anglo-American Cataloguing Rules (AACR) and the Regeln für die alphabetische Katalogisierung

(RAK), to name but two of the world's most prominent cataloguing codes, are engaged on major revision projects. The challenge to IFLA is to be sure that these code revision projects continue to recognize the need and importance of international harmonization and do not unfold in isolation. The ISBD Review Group is well positioned to assist the Cataloguing Section in the area of bibliographic description by initiating communications with groups revising national cataloguing rules to seek their cooperation in maintaining an internationally acceptable framework. No doubt the national code revision projects will have many suggestions by way of improving the ISBDs, and IFLA should welcome this possibility as a means of ensuring the vitality of its own standards. Modern procedures for standards development and review will play a major role in enabling IFLA to meet this challenge.

Therefore, it is necessary for IFLA to maintain leadership in coordinating such projects with its own standardization efforts and to rekindle commitments of national libraries and national and multi-national cataloguing committees to cooperation in maintaining bibliographic practices that will enable exchange of cataloguing data in the cost-effective manner which will benefit users throughout the world.

References

- ¹ For a more detailed introduction to the ISBDs, see: Byrum, John, "The ISBD's: What They Are and How They Are Used" *International Cataloguing and Bibliographic Control* v. 23, no 4: 67-71 (Oct./Dec. 1994).
- ² Available at <http://www.ifla.org/VII/s13/frbr/frbr.htm>
- ³ Available at <http://www.ifla.org/VI/3/nd1/isbdlist.htm>
- ⁴ Available at <http://www.ifla.org/VI/3/nd1/isbdtran.htm>

Transforming Libraries For the Blind in the Learning Culture of the Information Age: The Role of IFLA and the World Blind Union (WBU)

Presented to:

The Fifth General Assembly of the World Blind Union, Melbourne, Australia, 20-25 November 2000 by Rosemary Kavanagh, Chair Standing Committee IFLA Section of Libraries for the Blind (SLB) (E-mail: kavanar@lib.cnib.ca)

My task today is to explain the work of the International Federation of Library Associations and why cooperation is imperative between the World Blind Union (WBU) and IFLA's Section of Libraries for the Blind (SLB).

Library service is about the organization and distribution of all expressions of knowledge and it is fundamental to literacy and the culture of learning. Free library service is the foundation of democracy, citizenship, economic and social development, scholarship and education in progressive societies. The following quote is taken from the Okinawa Charter on the Global Information Society of the G8 Summit in Japan, July 22, 2000:

"a key component of our strategy must be the continued drive toward universal and affordable access...we will continue to...pay particular attention to the needs and constraints of the socially under - privileged, people with disabilities and older persons and actively pursue measures to facilitate their access and use.. We are committed to provide all our citizens with an opportunity to nurture IT Literacy and skills through education, lifelong learning and training. We will continue to work toward this ambitious goal by getting schools, classrooms and libraries online and teachers skilled in IT and multimedia resources"¹

Leaders from the most powerful and wealthiest countries recognize the importance of intellectual capital, skills and libraries in transforming social and economic condi-

tions. What they hold as good for all of society we too must hold as good also for blind people everywhere.

The challenges are enormous. 80% of the world's blind people live in developing countries, most are not literate and have no access to libraries. They live in poverty and social circumstances more extreme than the general population, the 'poorest of the poor'². 95% of blind children do not attend school in many parts of the world and do not learn to read braille. In a world where information doubles every two to three years and less than 3% - 5% of published materials are accessible, we ask our blind students to excel on less than 5% of what sighted students have available to them, and in many developing countries we have nothing for them at all. Accessible information remains the single most profound issue for libraries serving blind people.

Libraries for the blind are the largest producers and distributors of accessible content but are they well positioned to take advantage of new developments in digital library services? The SLB is the only body dedicated to improving the opportunities, circumstances and understanding of the special library needs of blind people anywhere. The WBU is the largest body representing the interests and needs of blind people worldwide. I am going to outline twelve initiatives the WBU and IFLA must consider in order to improve library services for blind people everywhere. I hope this will promote a better understanding of libraries.

Advocate access to information as a fundamental human right of blind people

Access to information is a basic human right recognized in article

19 of the Universal Declaration of Human Rights and endorsed by library legislation in many countries. Many countries recognize this by providing funding and legislating free library services and setting up national networks to ensure that information as a national resource is shared, regardless of circumstances or borders. Use public libraries as benchmarks for the type of service freely available to the general public which blind people subsidize through their taxes. Work with national and local libraries to develop advocacy and marketing programs which educate governments and consumers.

Distinguish between library services and transcription services

Many libraries for the blind originated outside mainstream libraries, primarily as a transcription service in blindness organizations. It is often easy to confuse the two. A good library service will ensure that you have the best information on a topic and if you cannot find a specific book it will find alternatives or better sources of this information. More and more of that content in today's world will be in a format you can convert to braille or listen to with a speech reader. We see blind users waiting for months or years for a book to be transcribed while the information on that subject is available from other sources and often in an electronic format.

Develop Zero Tolerance for Duplication

Duplication is costly, regressive and widespread. The same book may be produced several times within a country and internationally. Duplication occurs because libraries do not have the ability to research suitable alternatives. Make avoidance

of duplication a necessity for funding.

Insist that libraries for the blind adhere to mainstream library standards for organizing and distributing collections

Standards are seen as a luxury to be ignored. However, without standards libraries cannot record, retrieve and share content as part of a wider network or family of libraries. Libraries unable to implement accepted standards are excluding themselves from best content and from developing interconnected digital libraries of the future.

Seek cooperative arrangements for sharing resources

We have seen expensive equipment placed where without a good distribution mechanism it had little impact on increasing content. Good libraries do not work alone and too many libraries for the blind work in isolation. Seek partnerships with universities and local libraries who have access to the Internet and can assist in locating electronic content for conversion to braille or other formats or train staff in libraries for the blind; share bookmobile services to deliver braille books, play-back equipment or books on tapes to remote areas and those who are housebound. Establish cooperative, regional networks that share equipment, collections, technologies and expertise. Include the Ministers of Education from these regions or key leaders in the information technology industry who can help advance library service.

Support inclusive service models

Blind people and their families need service and access to information in their communities. Inclusive models promote working with local

public, academic or national libraries in the communities where blind people live. The IFLA/UNESCO manifesto for public libraries enshrines the duty of publicly funded libraries to serve all members of a community including blind people. The Guidelines for Library Service to Braille Users are published. Use these tools to urge publicly funded libraries to develop policies for serving people in their communities. Demand a share of the public initiative to provide free information to everyone regardless of circumstances. This does not mean that libraries for the blind will be replaced by public libraries but that they will partner to explore complementary relationships.

Promote Best Practices

Study successful operations and urge governments around the world to be cognizant of these successes. Do not re-invent the wheel. Libraries for the blind around the world will be invited to submit projects to a Best Practices Panel sponsored by IFLA SLB. The winners will be announced at the SLB Pre-conference to be held in 2001.

Set up worldwide arrangements with publishers and vendors

Copyright limits what can be produced or even loaned among libraries. It would take forever to change and align copyright laws in every single country of the world. It is time to try other solutions. The SLB is examining international concessions from rights holders and publishers for libraries for the blind to acquire their audio and electronic files for unabridged content.

Use the digital technologies of the information age to create more content for blind people

Today both mainstream libraries and libraries for the blind are

preparing for more and more electronic information and its distribution. The move towards digital audio books is only one aspect of this. Electronic content will enable faster transcription of materials into an alternate format. Linking libraries through technologies will enable access to more information. It is imperative that libraries for the blind and the WBU ensure that the needs of blind people for training and access are included in national plans for IT literacy.

Participate in the union catalogue developed by the Library of Congress

Our Section endorsed the Library of Congress' union catalogue which includes the holdings of many libraries for the blind in the world. Use it to locate material before producing it. You can get copies of this catalogue on CD-ROM to keep in your own countries today or it can be accessed online via the Internet.

Recruit the right skills

Libraries require staff who know how to acquire, organize and distribute information, are subject specialists, familiar with library networks, the Internet, information technologies, transmission systems and can apply these technologies and standards. If you cannot hire good professional staff, partner with an institution which does. We know that many staff from libraries for the blind do not participate in some of the excellent programs at IFLA because their own lack of training makes them unable to do so.

Urge Participation in IFLA and the Section of Libraries for the Blind

IFLA should be part of every library's training budget. It represents over 135 countries and fosters library service development worldwide. We are a volunteer organization of library professionals. IFLA does not provide funding for library

development. For example the SLB'S entire budget for the year is 1,000 guilders.

The SLB has a Standing Committee of approximately 20 members from all over the world. It provides the best opportunity for cooperative project development, training and awareness of library service, technologies and digital library developments. In March 2000 the first workshop on Library Systems and Internet Services for Libraries for the Blind was held in the United Kingdom. A Pre-conference for Libraries for the Blind is planned for Washington, DC on August 15 - 18, 2001. The theme is 'Digital Libraries for the Blind and the Culture of Learning in the Information Age'. We want to examine our future, in helping students, professionals and anyone engaged in life long learning. In February 2001 we are combining our business meeting with a Forum for leaders in Greece who can help make a difference in library services for the blind in their country. There are many more initiatives, training opportunities and working groups but not

enough libraries for the blind participate actively in IFLA for these purposes.

Over 80 libraries for the blind are members of the SLB and there are vacancies for six new members on the Standing Committee. Together with the FORCE Foundation SLB is seeking funding for one representative each from Asia, Africa and Latin America for the next four years to ensure consistent representation and success for initiatives in those parts of the world. We work closely with other Sections and Divisions within IFLA who cover areas such as UNESCO and the World Trade Organization on our behalf and establish the techniques and standards which we apply but could never afford to develop on our own.

Libraries are fundamental to literacy and culture in civil society. IFLA SLB cannot solve the technological and resource gaps in developing countries nor can we build successful libraries by donating a few books or a few braille embossers. "Old shoes for Bangladesh" are not

solutions for future success. We must move developing countries into the information age but 'Will' and 'Skill' are mighty forces for success. IFLA through the SLB offers the opportunity to set a framework in which future libraries for the blind are interconnected, part of the global information network with the same set of aspirations for all its users regardless of their economic or other circumstances. There are problems and standards libraries for the blind need to solve together but the WBU and IFLA must work together to advocate and build good library services. I close with an old Jamaican farewell, 'Walk Good My Friends' but to this I add, let us walk together with a better understanding of how libraries work best in literacy and culture.

¹ Okinawa Charter on Global Information Society. <http://www.g8kyushu-okinawa.go.jp/e/documents/it1.html>

² World Blind Union Brief to the 22nd Congress of the Universal Postal Union, Beijing, China, September 8, 1999