
I & R and Public Library Management

Donald Beagle

Much has been written about information and referral (I&R) as a public library service for patrons. To be sure, public need is the ultimate justification for any public library service. But I&R has the potential to meet an additional need: that of the library manager for information on community resources and problems confronted by area residents.

Briefly stated, I&R links people who have problems to people and agencies who can provide solutions. Before I&R staff can perform this function they must conduct an inventory of local resources; the word *resources* being broadly defined to include far-flung social programs as well as the local expert on beekeeping. This community resource file is then used to answer questions from the public, the goal being to refer callers to agencies or individuals who can address their needs.

Most I&R services also keep at least a minimal account of patron calls, and many record more detailed information about each transaction. Both the record of calls and the community resource file contain data that can impinge on management decisions in such areas as planning, collection development, adult programming, and public relations. This article briefly considers the use of I&R files as a management tool in each of these areas.

Planning

Users of the ALA publication *A Planning Process for Public Libraries* will be familiar with the need for extensive data collection prior to establishing goals and objectives. "The early steps of the planning process require information about the community and its population, its library and other information resources, and library performance."¹ Data collected toward this end is often compiled in a self-study and/or community analysis.

The I&R resource file and record of calls can provide valuable raw material, as well as a coher-

ent framework, for those portions of an analysis dealing with the community, its population, and its alternative information resources. This data would naturally need to be interpreted within the context of library planning requirements.

A second area of data collection in the planning process involves "... characteristics of users and non-users and reasons for non-use."² Citizen and staff surveys are discussed in this regard. The whole area of representative sampling (with its attendant problem of patron confidentiality) is too vast to be dealt with here. But at least one study has suggested that telephone information service is the library service most likely to attract traditional non-users.³ An established I&R service will include in its record of calls a significant number of queries from persons who use the library for no other purpose. Opportunities for surveys exist at two points in a typical I&R operation, either at the initial point of contact or during follow-up calls.

Is the type of information available to an I&R service appropriate for library surveys? Consider the sample survey in *A Planning Process*, described as being suitable for a ten- to fifteen-minute telephone interview. Its first section is "... designed to determine individual(s) perceptions of their information needs, how they meet such needs, and how well they are satisfied."⁴ This, of course, goes to the very heart of I&R; nearly every caller expresses such a need as well as the attempts they have already made to meet it.

Three of the five questions in this first section of the sample survey deal with specific population groups whose problems are routinely served by I&R programs: older adults who require special programs, consumers who want financial counseling, and newcomers who ask for directories of local agencies and services. Many communities establish specialized I&R services to deal with such groups individually. But a comprehensive, library-based I&R program can integrate its data into a broad overview of the community while serving the library manager's need for planning information.

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The second section of the survey deals with community activities. "Asking questions about community involvement allows planners to relate this type of activity to specific population groups ... Differentiating interest areas by population groups can help the library to design services to meet the needs of particular groups, especially the underserved."⁵ Again, the I&R service is likely to reach groups not served by other library departments, and the type of patron questions it will address are closely related to the survey rationale. (One study has indicated that informal and formal community involvement is a positive indicator of library use.⁶ It would be interesting to know whether a local I&R program fosters greater community and civic involvement.)

The planning process does not end with the first analysis. Evaluation of progress is cyclical, requiring periodic updates of the community study. Such updates, done by a hurried manager during a single week each year, will be at best a series of snapshots of a changing scene. But I&R files provide a picture of the community that evolves along with its subject. While not yielding the same quantity of data as the survey, the regular call files can capture changing currents of local interest not always reported in the popular media. When this author directed ACCESS Line in Cumberland County, I&R staff were aware of a newly formed "tax revolt" lobby group well before local newspapers caught the story.

Collection Development

An ever larger section of the reference collection consists of directories of organizations, subject specialists, and information networks and services. Such directories go beyond the role of traditional encyclopedic reference tools in that they provide secondary information the user may need to seek out primary answers. They may be seen as printed equivalents of I&R services. The reference librarian who includes such directories in a search strategy blurs the distinction between reference and I&R.

Has this distinction ever been valid? Reference librarians have used such directories for many years. The question goes beyond the proper scope of this article, but I would venture to say that many librarians have felt that their service responsibility (both in reference and collection development) begins with the patron and ends at the printed page. I would simply suggest that optimal selection and use of directories entails a service responsibility that begins with the patron and extends beyond the printed page into the

wider information environment of the community. Such a service responsibility is inherent in I&R.

The I&R service will reflect potential interest in the many specialized self-help manuals being published, especially in such areas as health, consumer rights, and the law. Local interest in the arts, crafts and recreation will also be indicated. Questions about topics on the cutting edge of the news may be the first clues to future widespread interest.

A recent issue of *Popular Government* profiled a municipal documents collection and an adult education project as examples of emerging library information services.⁷ It is worth noting that use of such special collections can be facilitated by comprehensive I&R services. Through their regular contacts with personnel in government and education, I&R staff stay abreast of new programs which inevitably generate printed materials. Conversely, collections of governmental and institutional documents greatly help staff who provide information and referrals to patrons.

Adult Programming

"The sensitive programmer can keep informed about the needs of the community by making the library an active member of strategic local organizations."⁸ Patricia M. Grim has given us this advice in her primer for programming. I would only add that there is no more strategic organization for identifying community needs than the I&R service. The programmer should indeed keep close contact with local I&R staff. And if such do not already exist in a community, then the library manager has the option of establishing the I&R service as a "member" of his own organization.

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ACCESS Line has shown that an I&R service can mount effective community programming on its own.⁹ Its files can be used in two ways: in identification of topics likely to be of interest and in identification of resource people to serve as speakers or moderators. Every community has individuals with unique talents and abilities. The I&R inventory will have identified and contacted many of them.

The I&R program can directly serve groups as well as individuals. Americans are joiners, and community groups form around topics of common concern. The same linking function applies whether the question is expressed by one person or by the entire membership of an organization. The referral provided by I&R staff applies whether it means giving one phone number to one patron or arranging for an entire panel of resource people to speak at a community meeting.

Finally, the library with an I&R service may well have a higher profile in the minds of other agency staff members than will a library with no such service. This is because many I&R programs are initiated by community advisory boards or involvement councils, with representatives from the agencies in question. Certainly, the library manager who wishes to maximize the I&R program's benefit to the library should invite such participation. Service providers in many fields are expected to do programming. They should more readily think of the library as a cooperative agent for their programs when they helped to establish its I&R department and handle referrals from its staff.

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Public Relations

"By representing the library, a programmer can offer to locate needed information for another agency, keep abreast of community activities and needs, publicize a program or service, and generate positive public relations for the library."¹⁰ True; and when I&R staff are themselves representing the library in daily contacts as well as in interagency meetings, the public relations potential described above is, if anything, enhanced.

In times of tight money, every unit of government is called upon to defend its relevance to taxpayer needs. While the call may be voiced by elected officials, the final arbiter will be the average citizen who asks "How is the library important to me?" I&R questions are different from reference queries. The difference between the question "In what year did the Lusitania sink?" and "Where do I appeal the denial of my claim for workman's

compensation?" is more than the difference between any two random questions. I would only again suggest that a proper response to the second question requires a different stance toward the community. Without slighting the importance of the first question, I would also suggest that a library that will not deal with the second risks being perceived as a luxury rather than as a necessity. At the very least, the library manager who can point to areas of urgent community interest that the I&R program has addressed has a handy wedge to drive in any debate over the relevance of libraries today.

The I&R inventory can be an excellent time to improve interagency relations. Opportunities for support and coordination may be missed if there is a lack of regular communication. Again, Patricia Grim's primer warns us against unnecessary duplication of effort among agencies. It was to expressly avoid such duplication that the United Way began a nationwide promotion of I&R services.

The results of the I&R inventory may be compiled in a booklet format for community distribution. Such a directory can be an effective public relations tool so long as its contents are accurate and up to date. It can be organized to highlight the library's own contributions to the cultural and intellectual life of the community. Portions of the directory dealing with services to particular groups could be reprinted as brochures and distributed to those constituencies in the area.

Conclusion

The use of I&R as a library management tool is not a panacea. This article has deliberately stressed its potential advantages. But no manager should hope to sit back and let I&R staff do the planning, programming, and public relations for the library. And while I have described I&R as a library-based service, it exists as an independent agency in many localities. Even so, it offers the library manager potential tools for understanding and serving his or her community.

Effective use of these tools requires confronting a number of questions. How can the inventory be best conducted to supply answers for analysis and planning? How can follow-up calls best be structured to allow for user surveys? How closely should the I&R service be identified with the library in its publicity? Such questions admit no general answers, only special solutions for each individual library.

Nor can the solutions be arbitrarily or conclusively given. Library staff continually face

novelty in the form of new questions, new community needs, new political pressures, and new opportunities. Novelty forces our plans, our collections, our programs, and our public relations to change. I&R offers us a channel for sensing and responding to change.

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10. Grim, 75.

Cape Fear Union List of Serials

The sixth edition (1984) of the Cape Fear Union List of Serials is now available. The Union List includes approximately two thousand serials titles held by Cape Fear area libraries, including Fayetteville State University, Fayetteville Technical Institute, Command Reference Center and Main Post Library (Fort Bragg), Methodist College, Pembroke State University, Base Library (Pope Air Force Base), and Cumberland County Public Library and Information Center.

CFLA would like to extend special thanks to Barbara Beattie, Cape Fear Valley Medical Center, for her work in compiling this year's list. The list is available for \$7.00. Orders may be sent to

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