Foreword

Larry P. Alford, Guest Editor

Library managers have always needed to show that they are using their resources well and to demonstrate that the libraries they operate are effective, service oriented organizations. In today's financial and political climate, however, public institutions are subject to even greater scrutiny from governing boards, from their users, and from tax payers who want to know that public resources are being used wisely and effectively.

At the same time, librarians are faced with enormous changes in how they provide information services. Donald Riggs writes in *Strategic Planning For Library Managers*, "Libraries are ... being pressured by societal demands to do progressively more with progressively less."[1] New technologies such as CD-ROM and other kinds of automated information services are revolutionizing the way information is provided without replacing or reducing the cost of more traditional information services. College and university librarians are faced with competition from other campus units, such as computer centers, seeking to provide information services that have traditionally been the province of the library. Public librarians must compete with the private information broker and other purveyors of information services.

Further, in the last three or four years many libraries, especially the academic libraries, have been faced with an extraordinary increase in the cost of serials. This has resulted in the severe erosion of the purchasing power of those libraries' book budgets as they have struggled to maintain their serial and standing order collections. Many of these libraries face increasing criticism from the faculty and students whom they serve because of the perceived failure to provide the new information services that make the tasks of the researcher so much easier while maintaining the book collections in the face of the exploding cost of serials.

All of this means that librarians must be better prepared to demonstrate that they are accountable for the financial resources made available to them. Thus, this issue of *North Carolina Libraries* is devoted to finance in libraries.

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Clearly, that is a topic that covers a lot of ground. The financial issues facing libraries affect virtually every aspect of librarianship and could fill volumes. The guest editor decided, therefore, to focus the first part of this issue on the topics that are of most relevance to the overall operation of libraries, planning and management information.

Good planning is essential to good management. Good planning requires information about the activities in which the organization is engaged. Much of the knowledge of those activities comes from the financial transaction records and budget information maintained by the organization. Thus, the article written by Gary Byrd deals with strategic planning and its financial implications for a library. The Health Sciences Library at the University of North Carolina at Chapel Hill has been engaged in an extensive strategic planning effort for the past two years. Mr. Byrd has been actively involved in that effort and is intimately acquainted with the need to integrate the finances of a library with formal planning.

A management information system is the mechanism through which a library collects and analyzes the information it needs to plan systematically. John Ulmschneider provides an overview of information systems in libraries and their use in the decision-making process.

Finally, D.W. Schneider and Catherine Seay give some specific examples of the use of microcomputers to collect certain specific kinds of financial data. Their examples are not intended to be a comprehensive catalog, but they should give librarians many ideas on how to use microcomputers to improve the management information available in their libraries.

The second section of the issue deals with three topics that are of great importance to today's library managers. Many libraries are purchasing automated library systems including acquisitions systems, serials check-in systems, online catalogs, and circulation systems. Dale Gaddis has surveyed public librarians throughout the state of North Carolina to determine the problems they have encountered in implementing online systems. She provides a comprehensive list of the problems and the financial implications for automating a library. We have all heard the horror stories of libraries that bought a new compu-

ter only to discover upon delivery they needed another $15,000 to build a controlled environment computer room. This article should help librarians avoid those unanticipated costs.

October Ivins discusses the implications for managing the library materials budget with the explosion in serials prices noted previously. Most large research libraries have seen the purchasing power of their book budgets fall as the decline in the value of the dollar and inflation in serials and standing orders have eroded the money allocated for the purchase of monographs. Ms. Ivins provides a number of helpful solutions to libraries seeking to manage this serious problem.

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Finally, Joline Ezzell discusses fund-raising in libraries. Most libraries, whether tax supported or supported through the revenues of a private institution, cannot provide adequately all of the services demanded by their patrons from existing institutional or governmental budgets. Librarians must become entrepreneurs and bootstrap new services and new technologies if they are to maintain their position as frontline information providers into the twenty-first century. The best way to do that is not to reduce existing services in order to offer new services, although that approach has its place, but to seek innovative ways to find new monies from outside the tax or institutional receipt base. The most successful libraries in the next decade will be those able to supplement their usual budgets by unusual means.

Susan K. Martin writing about libraries and new technologies in the Winter 1989 issue of *Library Trends* says, "We must seize the initiative to ensure that we control, and are not controlled by, the technologies of the future."[2] To seize the initiative and to shape and control our future as information providers, we must have a firm understanding of the finances of our operations, even those of us who may not have direct responsibility for the budget. We must know how we are using our resources if we are to justify keeping and increasing those resources.

References

1. Donald E. Riggs, *Strategic Planing for Library Managers* (Phoenix, Arizona: Onyx Press, 1984), 8.
2. Susan K. Martin, "Library Management and Emerging Technology: The Immovable Force and the Irresistible Object," *Library Trends* 37 (Winter 1989): 382.

RTSS Announces New Award

The purpose of these awards is to recognize promising and practicing librarians. Each award will be for $250. The recipients will be recognized at the Fall Conference of NCLA. Deadline for nominations is July 31, 1989.

Student Awards

1. The award is open to any student actively enrolled in library education or pursuing a career in the library field as of July 1, 1989. If the student has graduated, he or she must be in the library profession in North Carolina.
2. The student must be intending to pursue a career in Technical Services.
3. The student must have a demonstrable potential for contribution in the field.
4. Self-nomination is permissible.

For applications contact:

Georgianna Francis
Asheville-Buncombe Library System
67 Haywood Street
Asheville, NC 28801

Significant Contribution Award

1. The librarian will have made a significant contribution to his or her institution or to the profession.
2. At least part of the applicant's current work must involve an aspect of technical services, acquisitions, cataloging, classification of resources, collection development, preservation of library materials, or related activities.
3. The applicant must work in North Carolina.
4. The applicant must be nominated by a current member of NCLA.

Submit nomination and supporting materials to:

Betty Meeham-Black
Acquisitions CB#3902
University of North Carolina at Chapel Hill
Chapel Hill, NC 27599-3902
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