MARKETING AND INCOME GENERATION IN SCOTTISH PUBLIC LIBRARY SERVICES

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CHAPTER EIGHT

ADDITIONAL SOURCES OF PUBLIC LIBRARY FUNDING : LITERATURE REVIEW

8.1 Additional sources of public library funding: an introduction.

As the previous chapters have shown, there are various courses of action open to library managers who seek to make optimal use of the finance they have available. They may be able to improve efficiency through analysis of the ways in which staff carry out their duties, and through the introduction of new organisational structures and working practices. They may also target resources better in order to provide a more effective service. However, if libraries are successful in meeting the needs of their users this may generate greater demand: existing users will return and new users will be attracted. If customers are satisfied, their expectations may rise. These demands, at a time when there is a decline in traditional tax-financed funding and an increase in the costs associated with I.T. developments, have led many library managers to consider the means by which they may generate additional income.

Recent reports indicate that the generation of additional income will become a necessity for libraries. For example, the ASLIB *Review of the public library service in England and Wales* states that, even taking productivity improvements into account, "...increased demand will need both public sector funding and new, diverse sources of income" [1]. The latter may include fee-based services, direct sales, fund-raising events, grants and sponsorship.

To deal with the new challenges associated with funding requirements, the managers of public libraries in the twenty-first century will need to have special skills. As the ASLIB report states:

Authorities will need individuals who are aware of the service ethic, and who fully recognize the social, economic and political significance of their work. They must also have the financial and commercial know-how to develop large-scale funding from new and diverse sources [2].

This section of the thesis investigates the wide range of issues associated with income generation and the type of activities in which the next generation of library managers are likely to be involved. It considers the debate, which has ensued for many years, about whether libraries should charge for services, and it examines the constraints and incentives associated with income generation. It also reviews the range of sources of funding available to libraries in the UK and the projects in which libraries are already engaged (incorporating details of similar activities in selected other countries, for comparative purposes).

8.2 Charging for services: the fee v free debate.

8.2.1 The history of the debate.

In North America the issue of fee-based information services arose in the 1960s with the introduction of commercial databases [3]. The debate about user charges in libraries rose to the fore the following decade with the increasing potential, but associated additional costs, of computer-based information retrieval systems. Throughout the 1970s numerous articles were written on the subject by authors such as Berry, Blake, Perlmutter, Gell, and Kranich [4]. De Gennaro, writing on the topic in 1975, begins an article with the statement:

> The battle lines are being drawn for a great debate over the emotionally and politically charged issue of how library and information services are to be funded in the coming decades [5].

He goes on to comment that "most librarians" will favour the continuation of the traditional model of public library funding, i.e. a service that is supported from taxes and provides information at no direct cost to the user. He adds that, in contrast, "information industry people, publishers, government officials" and "even, perhaps, authors", amongst others, will advocate "a new concept of for-profit or pay libraries, user charges, and information as a salable commodity". In an article in the *Canadian Library Journal*, in 1981, Bassnett states that the debate has become "emotionally and politically charged, as both the logical and economic arguments provide support to each side, whether for or against charging for public library services" [6].

In the U.K., as early as 1969, Leicestershire County Council established a working party to consider the introduction of charges for public library services [7]. By the 1980s there was serious, widespread, concern about the threat to the free public library service, and a number of reports that were published during this decade highlight the need to consider introducing charges for services. For example, Flowerdew et al., in a report published by the British Library in 1984, state:

> Libraries are facing ever-increasing total costs, exponentially increasing according to some, as a result of attempting to meet the so-called information explosion. They are therefore likely to be under increasing pressure to recoup some at least of these costs through charging for some at least of their services [8].

Such a view is in keeping with government thinking in the mid 1980s, as illustrated in the 1986 Green Paper, *Paying for Local Government* [9]. It proposed a new local government finance system that would involve a direct link between payment for, and receipt of, services and it recommended giving local authorities "greater freedom over the level of fees and charges they levy" and "a greater incentive to maximise income from charges" [10]. The same

year, the Adam Smith Institute published the *Ex Libris* report, proposing the introduction of charges for a range of library services [11]. It suggested imposing annual membership fees, charging for each item borrowed, and charging for the use of reference and reading room facilities. The Library Association immediately condemned this report (which it described as "thinly argued" and "shoddy") and emphasised, in its response, that "charging was against its policies" [12].

Within the library profession, concern about the introduction of fees for services reached a peak in the late 1980s, following the publication of the 1988 Green Paper *Financing our Public Library Service: four subjects for debate* [13]. This consultative paper (which applied to England and Wales but dealt with issues equally relevant to Scotland) confirmed the government's commitment to the provision of a free basic public library service to individuals, but it attempted to encourage charging on a discretionary basis. It could be viewed as the first stage in an attempt to end the provision of a free service. Conversely, it could be judged to be just what it claimed i.e. an attempt to encourage library staff to consider diverse ways of financing their services at a time of general public expenditure constraints.

The Library Association opposed the Green Paper's attempt to define the services and facilities that could comprise the free basic public library service [14]. It was critical of the proposals that would create a situation that could discriminate against those who were not able to visit the library in person. It also expressed concern about the proposals relating to fees for inter-library loans, and the increase of charges to "economic levels", arguing that such developments could restrict access to information.

However, as Bailey points out, the ideas in the 1988 Green Paper need not be interpreted as being as radical as many members of the library profession first thought [15]. The existing legislation in England and Wales (i.e. the *Public Libraries and Museums Act* of 1964) already allowed libraries to charge for some services [16]. The 1988 paper only proposed that libraries could introduce charges for certain new services if they wished: it did not require library authorities to charge for services. In order to avoid the need for recurrent legislation as new services develop, the Green Paper suggested that the way forward would be for libraries to define a 'basic service' in a form that allowed all other services to be considered 'additional'. The former would be offered free and the latter could be made available, if considered appropriate, at a price.

The definition of a 'basic service', however, has proved problematic even though some fee-based 'additional' services have existed for years. (For example, a basic service might be the provision of reference books, sections of which could be copied out by hand free of charge, whereas the opportunity to use photocopying facilities, to save time and effort, could be considered an additional service). Despite the publication of Library Standards and performance indicators, there is no legislation to specify which 'basic' services should be provided to ensure parity of services throughout the country. As King points out, this has both advantages and disadvantages:

> ...there is a strong argument that this should be the case - each library authority can evaluate local need and respond accordingly. Yet this does mean that some authorities charge for business information while others do not, some make exorbitant charges for reservations so that only the most determined and affluent can proceed with requests... [17].

King also comments about the proposals in the Green Paper:

> It is disquieting to think of the national variation in public library services which would inevitably occur if the proposals were adopted. At the moment

Aberdeen provides all its services free, loaning everything from cassettes to pictures - while authorities like Surrey will undoubtedly make use of any new legal opportunities offered to increase income [18].

Ironically, less than ten years after this comment was made, and without any prompting from new legislation, Aberdeen City Library Service introduced a range of charges for services that had previously been free. These included an administration fee for non-residents who wish to borrow material, and a charge of £15 per half hour for local studies and business and technical enquiries which require over thirty minutes of staff time to answer. The range and level of the charges imposed were the subject of considerable local media coverage and some national coverage [19]. Yet, despite the adverse publicity, the Labour controlled council considered the decision necessary in the light of a major budget shortfall [20].

It is this argument, that charges are necessary if libraries are to be able to continue offering certain services at all, that has led, in recent years, to a degree of change in attitude amongst many members of the library profession. For example, as King comments:

> ...some librarians felt that charges were the only means by which new services could be introduced or, at the least, a way of restricting demand in order not to be overwhelmed... [21].

Such views are not unique to the U.K. Indeed, Lau, writing about events in Australia in 1993, reveals that there, too, one result of budget restrictions was a change in approach and a trend towards charging. She says, "Even those states that are reluctant to charge are considering some entrepreneurial activity to raise revenue" [22]. Fees may inhibit access to certain library services but, without additional income, budget constraints can limit the purchase of resources (resulting in an even greater number of people being denied access to the information they need). As Bailey comments, "In practice a blanket non-charging policy may be worse than a selective charges policy..." [23].

The question of the role of the public library is central to the debate about charging for services, particularly with regard to the provision of new or non-standard services. One of the problems associated with defining a 'basic' service is the assumption that basic means traditional i.e. the key services that have been offered by libraries in the past [24]. This definition may create an expectation that resources (such as books and journals) which are produced in paper format should be free whereas a fee may be levied for the provision of the same information in digital or audio-visual format.

Basing policies upon the means by which information is obtained, and the format in which it is produced, is short-sighted. Blake and Perlmutter's warning, given in 1977, still holds true: "Ultimately, we shall have to come to grips with the initiation and financing of a wide variey of information technology from which society can benefit, and we cannot proceed blithely and unthinkingly on the premise that it will all be solved by new and higher user fees" [25]. White argues that consideration of computer-based reference work as 'peripheral' and therefore potentially subject to a fee, is an indication of inflexible and unplanned budgeting practices in libraries rather than a reflection of priorities [26].

Writing about the situation in the U.S.A. in the late 1970s, Huston highlights the wide variation that existed with regard to libraries' policies on charging for online searching. She concludes that practices at this time ranged from full cost recovery and partial cost recovery (i.e. charging for direct costs such as connect time only), to flat fee charges and fully subsidised computer search services [27]. In the U.K., over the past two decades, many libraries have introduced fees for online searches, and policies on charging appear to be equally varied [28]. Some aim to recoup part of the cost of providing the service, some have a policy of cost recovery, and some consider charges as a means of limiting the number of

requests for searches. The variation in charging strategies employed by the providers of online services, in the 1990s, makes it difficult for libraries to have a clear policy even if they decide to pass on the full cost of the search to their users [29]. The increasing availability of the Internet in public libraries has brought further problems, and variation, as some library services have imposed charges for its use and others have not.

Batt, in his 1994 survey of the availablility of I.T. applications in public libraries, obtained details about online charging policies which reveal huge differences from one authority to another [30]. The replies range from 'no charge' to 'full charge', and a variety of fees and charging mechanisms appear to be employed:

- 50% of connect time cost
- actual cost + £3
- total cost + 10%

- 10p per printed page
- 10p for 5 minutes
- 5 minutes free / over 5 minutes £1 per minute or at cost

- cost + £5 per quarter hour
- all costs plus £30 an hour
- £30 per hour + add costs +VAT

- £2 per minute connect time
- £20 per search
- basic search £15 / full literature search from £20

Blake and Perlmutter argued, in the late 1970s, that publicly funded libraries should plan their budgets in a manner which avoids the introduction of fees for services [31]. They consider that costs could be constrained through restricting the provision of services to only those whom the libraries are mandated to serve i.e. through ceasing the provision of fee-based services to private corporations, information brokers, and profit-making businesses. Nowadays, this view might be considered controversial: many libraries in the U.K. pride themselves on the service they provide to local businesses, and many feel this is a vital role in terms of their status within the community. Indeed, Usherwood comments that although it is a tempting argument that public libraries should differentiate between services to the lay public and commercial organisations, it needs to be remembered that local firms contribute to local authority finances through the rating system [32].

Charging for services is a complex issue, which involves ideological, economic, and political considerations as well as questions of equity and administrative practicality [33]. However, the introduction of a fee-based service need not be a major problem for a library providing it has a clear mission statement and objectives. Fee-based services, like any other new services, need to emerge and expand in a planned way. Library managers must be clear about the role of their libraries in order to judge whether a service should be offered at all and, if so, whether it should be made available free or at a price.

In an article published in the U.S.A. in 1994, Young points out that, "Fundamental changes in the economic structure of library and information services over the last several decades are forcing a reexamination of the values and policies that serve as the basis for our practices and services" [34]. In an article that was published in the U.K. the same year, Tilson comments that, "There is evidence that libraries are expecting to attain target levels of income, set very often at a percentage of their running costs" [35]. Ward confirms the latter point in an unpublished work, written in the early 1990s, which describes the development of income generation strategies in Kent County Council Arts and Libraries Department [36]. He explains how an estimate of obtainable income was included in the Library's annual budget (and how, as an incentive to raise sums in excess of this figure, the department was allowed to retain any additional money) [37].

By the end of the 1990s, many library services were asking not 'whether charges should be levied', but which services should be made available for a fee, and how much that fee should be. On the other hand, there were still some librarians who vigorously opposed the imposition of any charges.

8.2.2 The arguments against charging for services.

In an article published in the U.S.A. in the late 1970s, Blake and Perlmutter comment that:

> User fees will ultimately create more problems and more serious problems than they can ever solve in libraries supported by public funds...
>
> Not only does the user fee limit the access of those who cannot afford the fee but it materially shifts the resources of the library without regard for the relative contributions of paying clients to the well-being of society as a whole [38].

They argue that the imposition of fees may lead to a situation where library administrators actively seek out paying customers, and that this in turn will lead to the acquisition of resources tailored to the needs of these particular users of the library service. Librarians may also be tempted to devote more time to meeting the needs of the people who pay for services (at the expense of those who do not). Clearly there is potential for user fees to distort collection development and service priorities, particularly where services, such as online searches, are of use only to individuals (and the money spent does not lead to the purchase of items that are added to stock). Furthermore, the administration involved in collecting fees may be extremely time consuming (especially where a system of exemptions is included) and inter-library co-operation might be damaged [39].

Blake and Perlmutter state, "No matter how extensive a library's funds may be, its services are finite and the careful allocation of scarce resources has to be assured for the ultimate benefit of the whole society and not merely for its affluent sectors" [40]. Similarly, in an article published in the U.S.A. in 1982, Braverman comments:

> We must guard against the easy options that suggest that for efficiency we serve only a "segment" of our "market" [41].

In an article entitled "Double Taxation" Berry condemns the idea of restricting access to information according to the citizens' ability to pay [42]. He says, "Public taxation is supposed to distribute the burden for services needed by all of society to all of its members. Library service is one of those social needs". Berry goes on to argue that by imposing fees, libraries are charging the public twice: "once in the tax bill and once at the door". Similarly, in an article entitled "Why should our users pay twice?", Stoakley argues that it is wrong to impose direct charges on library services [43].

In the U.K., in the 1970s and 1980s, the main opposition to charges from within the library profession appears to have been based on ideological grounds: the belief that freedom of access to information and culture should be available to everyone, and that the librarian's role includes ensuring that this is achieved. The article by Stoakley, published in the *Library Association Record* in 1977, includes comments typical of the views expressed by many members of the library profession at this time:

> Public libraries are the only source of recorded knowledge and information freely available to all members of the community. From their inception they have been funded jointly by the community to preserve their essential impartiality in serving the needs of all classes of users. If we are to have an educated and informed population we need a strong and open library system. If we believe in this basic principle, one which librarians have striven to maintain for more than a century and which has led to the development of one of the finest public library systems in the world, then we are likely to have to fight hard to retain it in the years ahead [44].

In the 1990s, there was still some strong opposition in principle to charging. Usherwood, for example, has made impassioned pleas for the retention of the free public library service [45]. As discussed in chapter three, a significant number of public library users make use of fiction and recreational reading material and some authors have suggested that this type of resource should not be provided from public funds. However, Lau's comments are typical of the views

of those who oppose this idea: "A policy of charging for recreational materials would be totally arbitrary, discriminatory and clearly unjustifiable" [46]. One of the strongest arguments in favour of providing access to fiction is the beneficial effect it can have on literacy levels. Unfortunately, however, it is difficult to measure or quantify this benefit.

Bailey argues that since it is difficult to assess how much libraries benefit the public, it is difficult to determine how much the service should be subsidised from tax revenues [47]. He acknowledges the points that are put forward by way of justification for the provision of free services (e.g. the low incomes of some users, public good characteristics, and economies of scale). However, he considers that these factors do not provide a rationale for the complete subsidisation of all library services. While stating this view, he recognises the potential problems associated with such an approach, i.e. that, "Increased revenue from charges may lead to a withdrawal of tax financed support in the future... " [48].

Opposition to charges focuses predominantly on the fact that infrequent and reluctant users might be deterred and the poorer members of society might be unable to take advantage of the service. There is, indeed, evidence that the introduction of fees can lead to a significant reduction in the level of use of services. For example, an article in the *Library Association Record* in 1977 reported that the introduction of charges for record-borrowing in libraries in Kensington and Chelsea had lead to a significant drop in levels of use, and an article in 1983 reported that the charges in force for library services in Derbyshire were acting as a disincentive to use [49]. Arguably, these changes, like the introduction of hire charges for the loan of choral music sets in 1994, might affect mainly those who could afford to pay for such non-standard services [50]. However, it is not always easy to identify, or categorise, who should be eligible for a subsidised, or free, service. The potential administrative difficulties

associated with defining which users which should be exempt from charges suggests that such an approach would be problematic and impractical. Moreover, as White discusses, any system that requires a means test (such as issuing library stamps to people on low-income) can be considered degrading to those involved [51].

The imposition of charges can also raise management problems if users consider that they are being penalised because of the stock purchase decisions of the librarians. For example, most libraries charge users for inter-library loan requests, yet readers could argue that a certain item should have been available in the local library because it is a standard title or information resource. White, describing the practice of charging for inter-library loans in academic libraries says, "This practice seems unfair because it makes the user responsible for the library's own, perhaps unwise, acquisitions decisions. Users charged for ILL items could argue that the library first fails to anticipate their needs in purchasing materials, then penalizes them financially for its "errors""[52].

There is clearly no easy way to decide which services should be provided free and which for a fee. Bassnet reports on the results of three large-scale surveys that were carried out in 1977 and 1978 in libraries in Canada and the U.S.A. [53]. The surveys reveal a wide variance in the number of libraries charging for specified services and a wide variance in the level of the charges imposed. From the results of the survey, Bassnet has compiled a "List of services that may be charged for, depending on legislation" but this list falls far short of providing a model upon which library managers could formulate legislation or base future planning [54]. Indeed Bassnet himself says of the tables of charges:

> Reactions to the summary tables are, firstly, how do public libraries decide to make a charge for a particular service, and, secondly, can there be any possible rationale for the amount of the charge made? [55]

In summary, the arguments against charging for services are:

- Library services are a public good and free access is a fundamental right of all citizens.

- There is a tradition that public libraries provide information at no direct cost to the user.

- Access to information should be based on need, not ability to pay.

- There is concern that charges may deter those who are least able to pay (but are, possibly, in most need of the service).

- Limiting services to those who can afford to pay for them suggests that they are not needed by the whole of society (and, therefore, that they do not deserve any public support).

- It is questionnable whether it is ethical to charge users for particular information simply because librarians have chosen to make it available in electronic or audio-visual format, or because a book that was overlooked in the stock selection process is available only on inter-library loan.

- Since users pay taxes to support the library service, the imposition of direct charges at point of use may be interpreted as requiring users to 'pay twice'.

- Fees may alienate users who object in principle to paying for the services.

- The income generated from the charges may not 'add' to the library budget if the local authority contribution is reduced by the corresponding amount. The long term effect of fees may be to reduce publicly funded support.

- The priorities of the service may become distorted as staff time and collection development decisions are geared towards satisfying the needs of those who pay for services. Resources might be diverted from core services to those that can generate an income, or from minority interest subjects to high turnover stock.

- Charges could lead to a reduction in the use of services, leaving stock and facilities under-utilized and creating the impression that libraries are not needed in the community.

- It is difficult to define, or distinguish between, basic 'core' services and 'special' services (for which a fee could be charged).

- Local authority policies or legislation may require certain services to provide free.

- The cost of the administration involved in collecting fees may outweigh the benefit of the additional income.

- There is concern that too few library managers have a good enough understanding of pricing policies to assign appropriate prices.

8.2.3 The arguments in favour of charging for services.

Giacoma, commenting on the situation in the U.S.A., might have been describing events in the U.K., when he wrote:

> While debate continues within the library profession, new fees are being adopted and old ones increased so frequently that one may justifiably wonder how many librarians are still listening to the voices arguing for the preservation of the free public library [56]

On a similar note, Cartmill asks the question, "With so many new pressures forced on the library service, with increasing demands, and increasing technology, can libraries avoid wider charges?" [57]. These comments make a significant point. So many library services are already being provided for a fee that it is difficult to argue against the imposition of new charges or the extension of existing ones. Indeed, a range of arguments have been put forward in support of charging for services.

One school of thought favours the idea that the imposition of charges can lead to a reduction in the frivolous use of services (such as inter-library loans) since, if people have to pay, they are likely only to request them when there is a genuine need or desire. Bailey points out that there is an argument that, as a result of charging for services, "excessive and unwanted provision" is avoided, as is the over-consumption of the service [58]. The imposition of fees may improve efficiency, and subsequent levels of demand may provide a rationale for resource allocation and new investment decisions.

The willingness of users to pay for a service may be indicative of the value they place upon it, but this takes no account of the fact that some people cannot afford to pay. The argument put forward by those in favour of charging for services is that, although some members of society

might have difficulty in paying fees, the majority of U.K. library users are not poor. As discussed in chapter three, the *Ex Libris* report, which was published by the Adam Smith Institute in 1986, makes the point that library users are predominantly educated, middle class people in white collar, professional, and management jobs [59]. Gell, commenting on the situation in the U.S.A. in the late 1970s, comments, "Surely there is something patently unfair about taxing an entire population to support a service used by only 20 percent - 40 percent, especially when most of those who do use libraries are economically capable of paying a fee" [60]. In an article published in 1988, Bailey puts forward the same argument [61].

Bailey makes the case that many of the arguments against the imposition of fees for library services are based upon the assumption that the choice is 'free versus fee' [62]. In contrast, he maintains that the real problem is determining the balance between subsidised services, freely available to all, and the provision of special services available at an appropriate cost. In certain circumstances, the income from fees might make the difference between a library being able to provide a service or not. In such cases, if charges are considered unacceptable, access to particular services could be denied to all library users. Indeed, Berry describes an extreme case, which became a major political issue in Albuquerque, New Mexico, in 1981: when the city council turned down the Mayor's proposal to raise a significant amount of revenue from the sale of library cards, it was left with a budget shortfall which resulted in a reduction in library opening hours [63].

In instances where only a small section of society (e.g. the business community) wish to have particular services provided, it may be argued that it would be unfair to use the general budget to purchase the specialised resources its members require. Indeed, the authors of a survey that was carried out in part of Strathclyde in 1989/90, conclude that, "It would seem that extra,

value added services such as business information or genealogical searches are acceptable as charge services as long as the basic service, the service which is provided at present, remains free of charge or at current levels of charging" [64]. Bailey gives examples of the type of library services for which a charge might be levied: fees for non-residents' use of the library, fees for book reservations (and notification when the title is available), fees for extended loan periods and additional borrowing allowances, fees for speedy access to newly published material, fees for inter-library loans, and fees for customised online searches [65]. Bailey emphasises the 'added-value' aspect of such services, arguing that charges are acceptable where special services are provided for the personal convenience of individual library users i.e. saving them time and effort.

Bailey suggests that the introduction of fees for the rental of items in heavy demand would be acceptable [66]. He argues that where a library does not want to purchase multiple copies of titles in categories such as popular fiction best sellers, it may choose to include a certain number in its ordinary stock, but make available other copies for a fee: "Those library users wishing to avoid the inconvenience of waiting for the free loan item to become available could then pay for one of the rental copies, the rental charge being less than the cost of purchase of the title from a commercial bookstore". On a related issue, Midwinter and McVicar raise an important issue when they quote a comment (made during an interview) about the imposition of charges for those services that are also provided locally by commercial sources [67]. In these circumstances there may be concern about the possibility that if a library offers a subsidised service, the private company could be put out of business. The selection of products offered, and the price at which they are made available, has to be decided with care. Where the library has to cover its full costs, it may be difficult to compete in what Fox

describes as "a cut-throat marketplace" and better to provide services and resources in niche areas where there is little competition [68].

The implementation of a strict no-fee policy at a time of minimal public funding would inevitably result in limited provision of services. Consequently, many libraries have been forced to adopt the middle path, distinguishing between the fundamental services, which are provided free, and the value-added services, for which a charge is made. Examples of the latter include Westminster Libraries' Chinese Library Subscription Service (which provides a service to public libraries throughout the country) and 'Artxtra' (an arts research service) [69]. The difficulty in sustaining such specialised services is evident in the fact that, only two years after the official launch of 'Artxtra', Chapman described it as "effectively moribund" [70]. (The possible reasons given for this decline include lack of staff to maintain the marketing and operation of the service).

In most cases, fee-based services are not intended to produce a profit: the income is required to subsidise the running costs. Koenig and Goforth identify various reasons why libraries in the U.S.A. engage in cost recovery [71]. These vary from the expedient (e.g. avoiding the difficulty of having to budget for unpredictable costs such as those arising from online searching) to the more policy orientated (e.g. allowing the provision of services that would otherwise be unavailable). However, the key factor upon which any charging decisions should be based is the mission statement of the library. The selection of services for which a charge may be appropriate will vary from one authority to another, as will the level of income generated from the fees. As the LAMSAC report, that was produced for the Office of Arts and Libraries in 1983, concludes, libraries differ according to the local environment therefore,

"...it is not necessarily true that the income generating activities which are undertaken successfully in one authority can be transplanted into another" [72].

The key issue with regard to charging for library services is to distinguish between core services and value-added options at local level. As Gell points out, providing the income obtained from charging for library services supplements support from general tax revenue, and does not become an alternative to it, fees are an economically viable way of expanding some services and improving others: employed selectively, user fees, "will lead neither to the salvation of the public library nor to its demise" [73].

The arguments in favour of charging for selected services include the following:

- Users are used to paying for certain other public utilities such as sports facilities and museums.

- Fees are already charged for certain services provided by public libraries.

- There is concern that all tax payers make a contribution towards the cost of libraries, yet they are used predominantly by middle class people.

- Most library users can afford to pay the costs involved, and a system of concessions could be put in place to accommodate individuals who need assistance.

- Fees ensure that those who use the services pay for them.

- Fees encourage responsible use of resources and serve as a mechanism for rationing.

- The willingness of the public to pay for certain services gives an indication of demand and demonstrates the value they place upon them.

- Fees encourage higher productivity, more efficient working methods, and the better management of resources.

- There is concern that, if libraries do not generate additional income, all users may be denied access to services that the library cannot afford to provide.

- Fees allow selected, special, services to be expanded or developed in a way that would not necessarily be possible without additional money.

- Local authority policies, or legislation, may require libraries to charge for some services.

8.2.4 Pricing policies.

Pricing policies have been discussed by many authors, including King, Fowerdew et al., Webber, and Rowley [74]. The latter, in an article published in 1997, argues that, from the perspective of the individual organisation, price is the single most important decision in marketing [75]. The price of products and services affects the extent to which consumers can obtain them. It reflects the value that is attached to the item and it affects the consumer's perception of the level of customer service they should receive. Pricing policies affect resource allocation and prices have an impact on the level of use of the services.

Various factors may be taken into account when calculating prices e.g. the costs involved, the competition (for example, the amount charged by private information brokers for the supply of information to businesses), the client base, and, most importantly, the policies of the parent organisation. Prices may be set at a level intended to achieve a profit, to cover costs, to subsidise a service, or to limit demand i.e. as a means of achieving rationing. Libraries seldom price services at a level designed to recover full costs, and if the generation of a high level of income from fees results in a reduction in the budget allocated to the library the following year there may be little incentive to maximise income.

Charges may be attached to specific services or they may be applicable only to certain categories of user. Prices can vary according to the time the service is used, they may be differentiated to allow variation between different geographical locations, and they may be set at a level that does not undercut local businesses. The imposition of a fee may be a legal requirement (for example for library photocopying services). On the other hand, legislation may mean that charges are not allowed at all for certain services. An article in the *Library Association Record* in July 1998 highlights the complexity of the legal situation [76]. It

describes the complaints that arose as a result of the imposition of charges relating to the use of microfilm readers at the Family History Centre in Bristol, and the suggested solution that a charge might be levied to <u>reserve</u> the machines (i.e. not for the use of the machines).

Kinnell and MacDougall discuss the reasons why libraries have adopted particular charging policies, including the variation in approach towards concessions [77]. They conclude that political influence was usually the decisive factor and, by way of example, they contrast the situation in Edinburgh (which then had a no-charging policy) with the London Borough of Sutton (which appeared to charge for "everything legally permissable"). Ward provides further evidence of this view in his description of the introduction of concessions for specific user groups in Kent (which was the subject of a difference of opinion between Library managers and the councillors until political control of the council changed) [78]. Rose, however, serves a reminder that there is no consistency between authorities of corresponding political persuasion [79]. He comments that Labour controlled councils might be expected to resist the imposition of charges and Conservative administrations to endorse them, but that the results of a survey of various local authority services showed no such clear-cut distinction

With regard to the imposition of fines, a survey conducted by Sheffield City Libraries in 1987, on behalf of the Association of Metropolitan District Chief Librarians, revealed a wide variation in the level of charges for overdue items [80]. The amounts varied from one authority to another, and there was no consistency across the country in terms of concessions for children, the elderly, housebound or disabled people. The fines differed according to the type of material involved and several authorities even had three levels of fine for videos depending upon whether the overdue item was a feature film, an educational resource, or for children.

In practice, many organisations employ a range of different pricing strategies simultaneously, depending on the services or products involved. King discusses the methodology used by the British Library in the late 1980s to establish a policy for the pricing of services in line with its strategic plan [81]. Tilson describes the results of a survey which indicate that many public libraries employ differential pricing (in particular, allowing concessions for pensioners, children and the unemployed) [82]. The essential factor, as Dibb et al. point out, is that the pricing strategies and objectives must be consistent with the mission and purpose of the organisation [83].

In order to assign a realistic price to library services, library managers need to determine the extent to which the potential purchasers require or desire the service. Interestingly, Tilson's survey of libraries in the London area found that only 20% of the responding public libraries had performed market research analyses in order to determine their charging levels (and only a further 40% indicated that analyses had been carried out "in some cases") [84]. Titman advises that it is not usually possible to decide upon a market price on the basis only of what people say they would be willing to pay [85]. He suggests that a range of techniques should be employed to identify a realistic price range. These include: market survey research, market trials, statistical analysis, and consideration of market and competitor data. Warner, however, warns against too much reliance on the prices charged by other organisations when determining fees for a particular library service: she comments that there is rarely a "going rate" [86].

When setting the level of charges, library staff should take into account the workload involved and the resource input that is required. For example, if renting exhibition space, the disruption and effort involved in organising a large number of small displays may outweigh the benefit of

generating a little extra money. Similarly, from an administrative point of view, when setting overdue or reservation prices, it may be more effective to select round figures, such as 10p or 50p. A higher figure may result in a slight increase in income but cause significant practical difficulties for those involved in collecting the money and providing change. Whatever the level of fee attached to a service, it is essential that the providers are aware of the real cost of providing it. Any decision regarding the continuity of a service, the level at which it should be provided, or the level of fee to be imposed, must take into account the costs involved to provide it.

Information itself is difficult to price. Unlike most tradeable commodities, information has no intrinsic value in itself. Rowley summarises the problem, saying, "Value depends on context and use by particular users on particular occasions. Hence, the value of information is impossible to determine in advance" [87]. As Akeroyd says, "...its ultimate value derives entirely from the perception of its recipient and user as to what benefits they see accruing from its provision" [88]. Information is often needed only for its contribution towards the creation of another product or service. Often the benefit is not fully appreciated until a much later date; for example, the value of information provided to a business may only become apparent once the end product is made and profits assessed. On the other hand, as Flowerdew et al. point out (using the stock market as an example) the time at which information is made available is sometimes of critical importance [89].

The main difficulty involved in assessing the value of information and being able to assign a price to it is, as indentified by Flowerdew et al., the fact that it is not easy for consumers to know how much value they are going to place upon a piece of information until they have it, and at that stage they may feel that they no longer need to pay [90]. Skyrme lists some of the

ways in which values can be added to information [91]. These include timeliness, usability, quality (i.e. accuracy and reliability), and customisation (filtering and formatting it to meet the specific needs of the user). Norton suggests that charges may be incurred for the provision of information if the service involves: speed, in-depth analysis, packaging, tailoring, confidentiality, labour-intensiveness, specialist knowledge or skills, and a time-saving element [92]. In an article entitled, "How to turn a library into a profit center", Doherty describes how this can be achieved using the example of a law library. He says, "Billable services are limitless. The first and main item to bill is your time" [93]. This serves as a useful reminder that one of the most expensive aspects of the library service, staff time, is often overlooked.

In summary, charges for library services vary according to the purpose for which they are intended. There is no 'recommended' price for a particular type of service. The main categories of price are listed below, along with examples of the circumstances in which it would be appropriate to use them:

- No charge - for services which must be provided by the library either as a legal requirement or as a result of established policy.

- Partial cost recovery - for services which the library wishes to promote but which are not a priority for free provision.

- Direct cost recovery - for services which the library wishes to provide but for which there is not adequate funding to provide from the existing budget.

- Total cost recovery - for value-added services for which users are prepared to pay but which are not considered part of the mainstream library service.

- Demand- orientated pricing - setting the price at the highest amount that users are prepared to pay.

- Priority pricing - charging for services for which there is multiple demand for the same items e.g. fees for speedy access to new books.

- Competitor-orientated pricing - taking account of the amount competitors and other, similar, organisations assign to similar services.

- Promotional pricing - special, below cost, prices to draw attention to new services, to gain custom quickly, or to encourage more use.

- Psychologically acceptable prices - prices which 'sound acceptable' e.g. under £1 or under £10.

- Use-limiting prices - set at a level intended to restrict demand to only those cases where there is real need of the service.

The factors which affect pricing decisions include:

- the mission and objectives of the organisation

- the purpose for which charges have been introduced

- the use to which the income is going to be put

- the amount of resources available

- the value the potential customer attaches, or is likely to attach, to the product or service

- environmental and economic considerations regarding the relative affluence of the potential users of the service

- Conjecture - assigning prices on the basis of estimates of demand and the cost of the work involved in providing the service.

- the stage at which the product or service is within its lifecycle

- the extent to which the price of one product or service may impact upon the price of others provided by the organisation

8.2.5 Differential charges and market segmentation.

8.2.5.1 Services to businesses.

An article published in 1986 by the U.S. National Commission on Libraries and Information Science states that, "When differentiating fee structures are employed, the primary distinction is between what the library perceives as its primary and secondary clentele" [94]. (Businesses and non-residents are cited as examples of the latter). Smith explains that it is to serve

'nonprimary clientele' that some libraries have established separate, fee-based services. She

also identifies the provision of information to business as an example of such a service [95].

In a report for the Scottish Library and Information Council in 1993, Mackay Consultants

stated that:

> We suspect that many businesses do not appreciate the real usefulness of some
> information and that may be reflected in their apparent reluctance to pay for it
> (or pay a realistic price). There is therefore a need to market business
> information (or, more correctly, specific types of information) in ways which
> will eventually convince the users of its value. That implies taking a pro-active
> approach.
> Some of the LECs are now doing this, as are the two European Information
> Centres in Scotland (Glasgow and Inverness), but it has been less common for
> libraries to do so [96].

At the time that this was written, information of help to those who were considering

introducing fee-based services to businesses already existed. For example, a British Library

Research Paper by Hyde, published in 1988, describes a project which aimed:

> To establish guidelines for those in the public sector developing library and
> information services to business and industry on
> a) levels of service
> b) charging by level of services [97].

Hyde argues that by moving away from the application of differentiated charges based on

types of user, and by concentrating on establishing a 'levels of service' approach, libraries can

still maintain the ideal of freedom of access to information. The income from fees may be used

to support the free service, for example by enabling the continuation of a specialised collection

that was otherwise under threat, by allowing stock to be purchased to enlarge or improve a

collection, or by providing funding for specialist staff posts which are of value to the library in

general. A fee-based service (which may be either subscription-based or pay-as-you-go) may

allow businesses to have extensive information searches done on their behalf and it may

guarantee responses within a given time. It should be seen very much as a 'value-added' service and not as a means of introducing charges for existing services.

If charges are made for information, the customers may expect a higher standard of service. Edmonds suggests that, although all information professionals should be concerned about the quality of the information they provide, for those in the fee-based sector this issue takes on more significance due to the threat of legal action if customers are dissatisfied [98]. Sykes emphasises this point, saying that:

> Though liability can arise regardless of whether money is paid or not, payment does, in practice, make a significant difference. Firstly, the courts would be reluctant on "public policy" grounds, to penalize providers of free information, because this would lead to withdrawal or drastic curtailment of such services. They would have no such compunction with regard to commercial operators. Secondly, the degree of reliance a client places upon information is likely to be greater if money changes hands. Significant decisions may be made on the basis of information thus provided... [99].

Despite such concerns, there are many examples of fee-based business information services. Indeed, Duncan comments in 1990 that, "More and more companies are waking up to the fact that information is an asset, particularly in terms of competitor intelligence, and it is in the field of business information that there is a marked growth in fee-based services" [100]. One of the first in Scotland was the Business Users Service in Glasgow City Libraries which opened in 1988 [101]. The following year, Birmingham Public Libraries established 'Information Direct' [102]. It was intended to meet the growing demands of business enquiries by allowing an enhanced level of service to be provided for a fee and by 1993, McGuire was able to report that, "... Information Direct has consistently overachieved on its income predictions, thus contributing to other services and projects for Birmingham" [103]. A similar comment is made in 1994 by Harrow, who writes about the City of Westminster Reference

Library's fee-based information service, "In a very short period of time we have evolved from a cost recovery exercise to a valuable source of incremental income to the library" [104].

Harrow also comments that the expectation that clients would be recruited from amongst existing library users did not reflect what happened in practice. He says, "In our experience users of the public reference service rarely convert to fee-paying clients". This view is echoed by Diamond, who adds that:

> An information service targeted at these new customers needs to employ
> different promotional and operational techniques to those normally found in
> public libraries [105]

If the service is aimed at the commercial sector, rather than individual members of the public, the prices assigned to the different levels of service should reflect this fact. Advice about how to establish the costs of providing such a service is available. (For example, Favret, in an article about Bromley's Business Information Service, identifies the main direct and indirect costs involved, and discusses a method of calculating the fees that are required in order to offset them [106]). Nevertheless, the issue of price setting has proved problematic for some libraries. For example, Russell comments that even though the aims of Westminster's "Information for Business" were the provision of a value-added service and income generation, the subscription level was initially set too low [107].

Writing in 1994, soon after the Business Information Service at Warwick had shut down, Mendelsohn sounds a note of caution about the profitability of such ventures [108]. Providing a fee-based service to local businesses may give the library a higher profile but it will not necessarily generate a profit. Webber also emphasises the costs involved in establishing and running an information service aimed at the business sector [109]. She comments that there is

little likelihood of such a service making a profit (unless related undertakings, such as publications or seminars, are taken into account). However she, too, stresses that there may be a number of important reasons, other than the generation of a profit, for providing such a service. For example, making more use of existing resources might be the key aim. This serves as a reminder that the question of how much to charge for business information in many ways reflects the more general issue of price-setting for services offered by public libraries, i.e. it depends upon the purpose of the fee.

Pricing considerations are, in turn, related to the mission of the library. As Giacoma comments, "The fee issue is intimately tied to the broader issue of the purpose of the library... The two are interdependent" [110]. The ultimate question is, 'whose needs is the library aiming to meet?'.

8.2.5.2 Services to non-residents.

In a 'conference call' discussion in *American Libraries*, Coffman and Freedman disagree about a number of issues connected with charging fees for library services, yet neither considers the application of charges for library cards for non-residents to be a matter of concern [111]. Internationally, however, the policy has both supporters and opponents. The main argument in favour of charging non-residents is that they have not contributed towards the cost of the services through their local taxes. The arguments against charging are based predominantly on the belief in freedom of access to information. In some countries, including Scotland, the debate also centres round the interpretation of relevant legislation [112].

A survey of the literature on this subject reveals the extent of the difference of opinion, both within and outwith the library profession, on this issue. For example, Akeroyd describes the events surrounding the controversial decision to introduce fees for non-residents using Denver Public Library, in Colorado, in 1981 [113]. He comments on the mix of praise and condemnation that was received from colleagues and patrons. In another example from the U.S., Hicks describes the introduction of a non-resident fee card programme in Dallas, and the effect it had on the level of use of public library services by patrons from outwith the area [114]. Bassnett's survey of library services in Canada reveals that a high percentage of the libraries there charge non-residents for a library card [115]. The latter survey also reveals that there is a wide variation in the price of this card (from $4 to $30).

When considering pricing levels, it is important to take into account the reason why charges are being introduced. For example, in Denver the purpose was to reduce the workload of the Central Library (or to obtain additional funds to support the provision of services to all state residents) in order to "continue providing the best possible service to the Denver taxpayer" [116]. In Scotland, in 1997, Aberdeen introduced an 'administrative charge' of £15 for non-residents as a means of increasing income to help to make up some of the shortfall resulting from budget cuts [117]. Despite the controversy surrounding the latter policy, Aberdeen is not the only Scottish library service to have introduced such charges. Edinburgh City Libraries impose a £10 fee on those who do not live, work or study in the city. Indeed, the survey on income generation that was undertaken on behalf of LISC(S) in 1988 identifies several examples of services for which differential charges apply to non-residents [118]. These include charges (or extra charges) for non-residents to borrow from audio collections, to have written and telephone requests for genealogical information dealt with, and, in the case of the North East of Scotland Library Service, to obtain book collections for use on North Sea oil

production platforms. In an article about Glasgow District Libraries in 1989, Miller highlights a concern that is common to many large Library Services, when he asks, "...why should the people of Glasgow provide a free enquiry service to people from elsewhere in Scotland, Britain or as is often the case, from abroad?" [119].

One of the significant differences between the situation in Denver and that in the Scottish authorities is that the former charged for access to the resources of the library whereas the latter still allow free use of the facilities for reference purposes. For a time, a one-day reference pass was available for purchase in Denver. However, the high level of concern at this restriction of access to information led to the intervention of the Denver Regional Council of Governments and resulted in a cost-sharing agreement between the State and the metropolitan counties. This agreement involved the removal of fees for access to the building and for the use of reference services by the inhabitants of the participating counties.

8.3 Other sources of income.

8.3.1 Referenda and local taxes.

In the U.S.A. referenda are held periodically to seek approval for additional finance (from 'general obligation bonds', property taxes, utility taxes, special taxes, and sales taxes) for library capital projects and operating funds [120]. Curley comments on the diverse nature of the taxation structures throughout the United States and the effect that the variation in local government finance has on libraries [121]. Even the system of referenda can produce variable results: Hall comments that the season in which the election takes appears to have a bearing on the result, as does the nature of the other issues upon which voters are asked to air an opinion at the same time [122].

There is a considerable amount of work involved in organising and carrying out a library campaign prior to a referendum. Indeed, the list of campaign methods cited by Hall, as having been of significance in 1987 and 1988, is quite extensive [123]. However, the success rate of the referenda in the U.S. is encouraging. With the exception of 1991/1992 (though, even then, 74% of the capital campaigns were successful), the vast majority of campaigns in the 1990s have produced positive results [124]. Curley describes instances of "stunning reaffirmations of popular belief in the importance of the public library" when the electorate was allowed to vote directly on library issues [125].

The *Library Journal* has published data on U.S. library referenda: details relating to capital improvements since 1987, and details relating to operating levies since 1994 [126]. Hall states that, "Of the 64 referenda seeking to garner capital funds between July 1, 1995 and June 30, 1996... 57 campaigns (89%) were successful, with only seven failing" [127]. He explains that, "86% ($248 million) of the $288 million sought was approved by the voters, with only $40 million rejected" [128]. The position with regard to operating funds was equally successful, with 63 of the 75 referenda (84%) successful and $78 million of the $86 million that was requested being approved.

The ASLIB *Review of the public library service in England and Wales*, which was published in 1995, recommended that, "...library authorities be enabled to seek local electoral backing for special additional funds, specifically to support the maintenance and development of 'core' library services" [129]. In Scotland, following the 'Yes' vote in the 1998 referendum on whether a new Scottish Parliament should have additional tax raising powers, the idea of inviting the public to vote on whether they would be prepared to pay more for particular local services does not appear out of place. Interestingly, one of the findings of the ASLIB review

of the public library service in England and Wales relates to the public's views on the idea of increasing taxes to support libraries. The report states:

> "Our trade-off analysis suggests that, on average, English and Welsh people would spend an extra £5 - £10 per household annually to see improvements in public library services - with more books and longer opening hours ranking high on their list of priorities" [130].

8.3.2 Fund-raising and 'Friends Groups'.

An alternative to tax funding, or the imposition of fees, is fund-raising. The term covers a wide range of issues. As Wilkinson comments, it includes both philanthropy (gifts, donations and endowments) and development campaigns [131]. People make donations to 'good causes' for a number of reasons. Wilkinson's list includes: belief in the cause, the desire to be associated with success or a prestigious institution, loyalty to an institution with which one has had a personal connection, the wish to achieve personal recognition, or the pleasure of feeling that a good deed has been done [132].

House describes how professional fund-raisers communicate with their audiences, and the range of media they utilise, to motivate and persuade individuals to make donations to selected causes [133]. The need to appeal to the values and ideals of the target audience is highlighted alongside the main rhetorical criteria which need to be taken into account. House identifies various mistakes which fund-raisers may make and he draws attention to the fact that potential donors receive numerous appeals from different organisations. He emphasises the type of communication skills (and the approach) that the fund-raiser needs to adopt in order to be successful. Such an account illustrates the need for fund-raisers to be properly trained and to be aware of the approaches which are most likely to result in the contribution of funds.

Bryant warns that the availability of private funding may lead to a reduction in public funds [134]. (Similarly, White comments that it is reasonable to raise money for special, additional, services, but short-sighted to use such finance to support activities that should be part of the basic publicly-funded provision [135]). Bryant also points out that difficulties can arise if donors stipulate that their money is only to be used for a particular purpose: he advises that if the restrictions prove incompatible with the library's objectives, the gift should be rejected [136].

Potts and Roper comment that:

> American libraries tend to have a more organized and aggressive approach to fund-raising. This results in much larger amounts of funds actually being raised.
> In Britain most libraries tend to adopt a more *ad hoc* approach. It has had some successes but libraries could have raised much more with a structured approach [137].

Burlingame comments on the situation in the U.S.A. in 1994. He states that there is a large quantity of practical fund-raising literature, but that "there has not been a significant body of research developed, although some progress is beginning to be made" [138]. Fischler, in an article published seven years earlier, comments that part of the difficulty when trying to identify relevant publications is that the research is not grouped together under one index term: items are to be found under headings as diverse as 'gifts', 'building campaigns', 'taxation for libraries', and 'Friends Groups' [139]. Nevertheless, many librarians have experience of formal fund-raising activities, and some have published details of the strategies and techniques they adopted. For example, Fischler describes a survey that was undertaken in 1985 to identify which fund-raising methods were being employed by academic and public libraries and how successful they were [140]. (1150 public libraries received questionnaires and, although only about a third replied, useful information was gained. The results show that many of the libraries had been successful in raising funds and, even where the effort was not

considered cost-effective, the exercise was generally considered to have been positive and worthwhile in terms of public relations). In the U.S.A., the Development and Promotion Co-ordinator at the Sterling C. Evans Library at Texas A & M University is amongst those who have published information [141]. In the U.K., Lomax et al. have produced a useful publication about additional sources of funding [142].

Potts and Roper describe a variety of ways in which American libraries raise funds, e.g. through donations (including bequests in wills), Foundations and Trusts, and 'Friends of the Library' groups [143]. In some cases individuals participate in an annual donation programme and, in return, receive privileges such as invitations to special events. Potts and Roper draw attention to the fact that organising Foundations and Trusts is a serious business, since they need to be established formally - with a Board and clear aims and objectives relating to their fund-raising work. Similarly, a number of issues need to be given serious consideration when establishing a 'Friends' group. These include health and safety issues (such as insurance for volunteer workers), security, audit procedures, the level of involvement of library staff in the activities of the group, and the decision-making process relating to how the money raised by the group should be spent [144]. Providing the remit and objectives of Friends Groups are clearly understood, they can fulfil a useful role with regard to both lobbying and generating income. (By way of comparison, Boylan discusses the major contribution that such groups have made to museums and to cathedrals, churches and historic building restoration appeals [145]).

In a forceful article in the *Library journal*, in 1994, Schuman and Curley describe the American Library Association's campaign to mobilise public support for increased federal spending on libraries [146]. The scale of the campaign, targeting politicians and the media at

both local and national level, is impressive. Training workshops were organised to impart advice on topics such as public speaking, interviewing skills and lobbying. The importance of the role that could be played by Friends groups was not overlooked.

Hall, in an article about the use of referenda to obtain funding for public library buildings, comments, with regard to campaign methods, that, "...the participation of a library Friends group in numerous activities was considered essential in many cases" [147]. Voluntary work, contacting library users by phone and assisting with mass mailings, was identified as being of particular value. Indeed, voluntary workers, either as part of a formal Friends group or as individuals, can provide a significant amount of help to libraries. Volunteers may target their efforts upon areas of work which Library Staff are not best positioned to undertake. For example, a newspaper article, in 1997, describes a system in operation in Dundee where retired people encourage other older people to use the computers in libraries [148]. Moreover, the results of a survey undertaken by Jervis reveal the great extent to which many U.K. libraries rely on volunteers to assist with the provision of services to housebound people [149].

In an article about the success of the 'Friends Group' at Gustavus Adolphus College, in Minnesota, however, Haeuser emphasises the importance of ensuring that the efforts of the volunteer fund-raising organisation do not work at cross purposes with those of the professional staff employed to undertake such activities [150]. (For example, there is a possibility that volunteers could become too involved in professional activities such as stock selection [151]). Haeuser describes an initial goal of the college 'Friends' i.e. to raise the library's proportion of a challenge grant offered by the National Endowment for the Humanities. This type of activity has the benefit of allowing a library to pursue a challenge

grant without having to commit mainstream money to the project. Lomax et al. comment on similar issues in their publication about the results of a survey relating to the experience of Friends Groups in the U.K. [152]. They warn that the groups may take up more professional staff time than their activities merit, yet they point out that there are benefits in having assistance with the time-consuming tasks such as grant applications.

In an article published in 1984, Usherwood comments that, "Friends and library support groups have been established in America since the early 1920s and there have recently been a few examples of such groups being established in Great Britain" [153]. A decade later, in 1994, Reeder described the activities of the Hertfordshire 'Friends of Chorleywood Library' at a C.P.I. seminar [154]. Only four years after that a whole seminar, organised by C.P.I., was devoted to the topic of 'Friends of Libraries' [155]. The same year, the 'mailbase' list 'lis-pub-libs' included discussions on this matter [156]. By 1999 an article in *Shelf Life* reported that there were over 2,500 'Friends of Libraries' groups in the U.S.A., with a total of over a million members, and that about 150 such groups had been established in public and academic libraries in the U.K. [157]. By February 2000, the Library Association Record was able to report that there were over 160 Friends groups in existence and that, "A national federation of Friends of Libraries, suggested by consultants CPI in a study funded by the Library & Information Commission (LIC), is one step nearer" [158].

8.3.3 Sponsorship

Dibb et al. define sponsorship as, "The financial or material support of an event, activity, person, organisation or product by an unrelated organisation or donor" [159]. There is a commercial aspect involved in sponsorship that allows this activity to be distinguished from

patronage (such as that demonstrated by Carnegie). Wynne draws attention to this fact, emphasising that, in exchange for the provision of funding, businesses expect their name, product or service to be promoted [160]. A similar point is also made by Bird in his comment that, "Sponsorship is not a charity, which is the giving of money or goods without any thought of reward. Sponsorship is not patronage which involves personal promotion but not corporate promotion" [161].

Sponsorship should be seen as a business transaction between two partners, each of whom gains from the arrangement. Pia advises that, "Successful sponsorship needs successful partnerships and clearly defined objectives of mutual benefit" [162]. She points out that many businesses become involved in sponsorship in order to raise their profile and increase their market share, and that, "Many businesses actively avoid being associated with high-profile spending on what might be perceived as 'unnecessary' artistic events". Sponsors want their money to be put to good use. They desire to have their name associated with successful events organised by respected institutions. If libraries engage in sponsorship arrangements, they must also ensure that the companies with which they become involved are suitable. The definition of what is considered appropriate (by the local council and the users of the service) may change over time. For example, as McMenemy points out, the source of funding that was used to establish the Mitchell Library in Glasgow (i.e. the bequest of the Victorian tobacco merchant Stephen Mitchell) might be considered inappropriate nowadays [163].

In an article about the deal between the Library Association and Peters Library Service, relating to the sponsorship of the Carnegie and Kate Greenaway awards, Dyer and Sheldon provide the librarian's view and the sponsor's view of the issues involved in establishing a successful partnership [164]. Bird, in a seminar paper published in 1993, considers that, at

that time, sponsorship of events and promotions such as Arts festivals, childrens' book weeks and competitions, was the most common form of such initiatives [165]. The investigations by Lomax et al. concluded that sponsorship was sought frequently for publications [166]. It was also considered useful in connection with other non-core costs such as the provision of refreshments at events.

Sponsorship need not take the form of cash. As de Graff points out, it may be in the form of goods (such as stock or equipment), services (such as printing leaflets), or people (for example, additional staff to work on a specific project) [167]. Indeed, an article in the *Library Association Record* in 1996 describes the services available at the new library in Wokingham, Berkshire, and the 'unique sponsorship deal' with Microsoft which involved the latter supplying the network operating system and a considerable quantity of software and C.D. ROM licences [168].

In an article about the Sir Thomas Lipton Collection Sponsorship Project at Glasgow City Libraries, Macpherson stresses the importance of honesty in sponsorship and partnership arrangements [169]. The Mitchell Library holds a major collection associated with the life of Lipton, and the Unilever company has contributed significantly to the preservation and upkeep of the resources. (The company was keen to draw the public's attention to the link between Lipton products and Unilever, and the link between Lipton and Glasgow). Macpherson describes the support provided by Unilever, from the initial financial contribution to cover the costs of conservation work, and the sponsorship of a member of staff, to the more ambitious plans that developed later. The latter centred on a major exhibition that was organised by the library in Glasgow's Royal Concert Hall in 1995. However, the project ultimately also involved the sponsorship of a concert by the Royal Scottish National Orchestra, liaison with

Glasgow Art Galleries (which lent Lipton's Yachting trophies, etc. for the display), and the publication of a book (written by Bob Crampsey) by the City Libraries. The project received one of the L.A. / T.C. Farries Public Relations and Publicity Awards in 1996. It serves as an example of what can be achieved, over a period of time with a high level of sponsorship.

The Mitchell Library project is one of four case studies considered by McMenemy in his MSc. dissertation on sponsorship [170]. Two of the others are from the U.S.A: a project at the Free Library of Philadelphia (which aimed to raise a considerable amount of funding), and a project at Seattle Public Library (which McMenemy uses to illustrate the potential role of 'Friends' groups, 'Foundations' and the value of personal contacts). Potts and Roper highlight the fact that in the U.S.A. corporations donate millions of dollars (as well as goods and services) annually to charities and other organisations [171]. The amounts of money involved in U.K. library activities are markedly smaller than in the U.S. examples and, having compared British and American strategies towards sponsorship and fundraising, Potts and Roper conclude that the former could learn from the practices of the latter.

Some action has been taken to try to improve the situation in the U.K. For example, the British Library Research and Development Department (on behalf of the Office of Arts and Libraries) commissioned ASLIB to examine sponsorship in public libraries. The results, which were based on evidence obtained from a study of libraries in the Midlands, were publicised in a report in 1992 [172]. The research found that the librarians were 'product orientated not market orientated', that the expectations of sponsors were low but that they were willing "to entertain appropriate proposals", and that most users felt that, with certain particular exceptions, the use of sponsors was acceptable [173]. The overall conclusion of the report is that libraries have the potential to develop more income from sponsorship, although

this form of funding is unlikely to ever become a major element of their budget. The report identifies areas in which libraries could make improvements in order to take full advantage of the opportunities available to them. It asserts that libraries have a lack of clear aims and objectives, and that there is inadequate co-operation between authorities (e.g. to ensure that neighbouring authorities are not competing for sponsorship for similar events from the same companies) [174]. Other problem areas mentioned include: poor media coverage at national level (as opposed to the good publicity at local level), and the fact that staff have not been adequately trained in marketing techniques.

The ASLIB report states that library suppliers are the most regular sponsors of library initiatives [175]. The companies receive many requests for sponsorship and they could favour the authorities that have the greatest purchasing power (since this is where they might achieve the highest amount of sales and therefore maximum profit). Consequently, smaller authorities may find that targetting national library suppliers is not the best strategy for them. Other potential sponsors might be more interested in obtaining access to the members of the public who use the library, or who attend particular events organised by the library.

Sponsorship can provide companies with a cost effective way of targetting specific audiences therefore libraries need to consider carefully the type of sponsor they should approach in order to maximise their chances of success. Wadley et al., making reference to examples also quoted by Kinnell and MacDougall, state:

> Commercial sponsorship of libraries is an emerging solution to the funding problem. Current examples include Huyton Library in Knowsley and Ferndown Library in Dorset, which are sponsored by Asda and Tesco respectively. This can be a mutually beneficial arrangement in which the library enjoys another source of income and the sponsor gains valuable advertising. However, acquiring sponsorship entails a long process of negotiation, and many companies, under financial pressure themselves, may be unwilling even to consider such a scheme [176].

The sponsorship training manual which ASLIB produced in 1992 provides information about how to attract sponsorship, the issues which need to be taken into account (e.g. the implications of involving more than one sponsor) and ethical considerations [177]. Some of these points are also made in the report on a project that was undertaken by North Yorkshire County Library with funding from the Public Library Development Incentive Scheme [178]. This feasibility study investigated 'sponsorship, joint ventures and appropriate advertising' in a rural authority. The results showed the divisions in staff attitudes towards the concept of commercial sponsorship, the emphasis placed by businesses upon both involvement in the local community and the awareness of their name (rather than promotion of the product itself). The importance of press coverage and the relevance of the project to the sponsor's corporate image also emerged as significant factors, as did the amount of work involved in establishing sponsorship deals. Bird concludes, from the results of the ASLIB review of sponsorship in libraries, that:

> ...libraries will continue to attract sponsorship but it will be small scale and will fail to increase as a proportion of income until full marketing strategies are adopted by public libraries [179].

8.3.4 Joint ventures.

Joint ventures between public libraries and other organisations in the public or private sector may be a means of providing services that could not be established or sustained otherwise. Involvement of the private sector can allow cost-effective exploitation of resources that would otherwise remain little used. However, negotiations must be entered into with caution. For example, as the 1987 *Joint Enterprise* report by LISC and the British Library Research and Development Department (on behalf of the Office of Arts and Libraries) warns, library managers need to be aware of the dangers of signing away the rights to information which is

currently under the control of the public sector [180]. Areas of liability need to be defined in a contract, and care must be taken to ensure that the library does not appear to be recommending particular private businesses to the detriment of others. The above report identified two barriers to increased activity in the area of joint ventures: lack of knowledge in the private sector that libraries hold resources that could be commercially exploited, and lack of awareness in the public sector that some of the material held by libraries could be attractive to commercial organisations [181].

The provision of information for business and industry is one area where there has been successful collaboration between public libraries and Higher Education libraries for many years. For example, as early as the 1950s, the Hertfordshire Technical Library and Information Service (HERTIS) was established to provide services to academic institutions and the industrial community and, in 1979, it introduced a 'Commercial Information Service' in partnership with the public library service [182]. More recently, in 1990, 'Information in Business' was established as a joint venture between the then Leicester Polytechnic and Leicestershire County Council Libraries and Information Service (L.L.I.S.). Towlson, writing about the latter, draws attention to the work that is involved in setting up such a service [183]. She describes how it was only after lengthy discussion that a five-year contract was signed, by which the L.L.I.S. contracted out the provision of a public business information service to the Polytechnic.

A business information service, operated by a private information broking firm using the resources of Suffolk County Information and Library Service, is one of the case studies discussed in the 1987 *Joint Enterprise* report [184]. The examples selected cover a variety of information services. They include: Devon County Council's publications project (which was

undertaken in partnership with a commercial publisher), Gloucestershire County Library's press cuttings service (which was carried out under contract for the Countryside Commission), and the Gateshead Shopping and Information Service. (The year after this report was published, the 1988 Green Paper, *Financing our Public Library Service: Four Subjects for Debate*, provided further encouragement for library managers to engage in joint ventures [185]). By 1991, Oakeshott and White were able to provide details of the progress made by projects described in the 1986 report, as well as information about a range of new activities involving public libraries and the private sector [186]. The extension or enhancement of services, the accumulation of expertise, improvement of status within the local authority and income generation, are amongst the benefits listed by the authors [187]. Publishing is identified as a particularly useful way in which joint ventures can make existing information available more widely, and generate income for libraries.

8.3.5 Grants.

Grant funding is another source of income open to libraries. However, the range of available grants changes constantly, and there may be complex, lengthy, application procedures and conditions associated with the awards. It is time consuming to keep abreast of developments and opportunities as the bodies and agencies that award grants, and the criteria involved, change over the years. There is also a danger that alterations to the criteria may leave those who had previously relied on grants in a difficult position if they are suddenly no longer eligible for funding. For example, many libraries benefited from grants made by the Home Office, under Section 11 of the 1966 Local Government Act, to employ staff to help meet the needs of certain immigrant groups [188]. However, changes introduced by the Home Office in 1990 left many of the jobs insecure [189].

Since the late 1980s a significant number of libraries have been involved in the grant application process. Indeed, formulating and submitting grant aid proposals was the subject of a C.P.I. seminar in 1988 [190]. In some authorities, library managers have gained experience in compiling good quality bids, and have been awarded substantial sums of money as a result. In others, either applications have been unsuccessful or little (or no) effort has been made to obtain grant funding. This situation is likely to lead to a greater disparity in the services provided by different libraries. Future research, notably the investigation to be carried out (by staff at the Information Management Research Institute at the University of Northumbria at Newcastle) into the effects of becoming involved in this 'bidding culture' should shed more light on the consequences of this activity [191].

With regard to the grants themselves, a major source of funding in England, for a number of years was the 'Public Library Development Incentive Scheme' (P.L.D.I.S.). It was administered by the British Library Research and Development Department (originally on behalf of the Office of Arts and Libraries and later on behalf of the Department of National Heritage) [192]. The P.L.D.I.S. began in 1987, with the aim of encouraging new enterprises that were designed to extend or improve public library services and, initially, £250,000 was set aside for each of the first three years of the programme. The scheme was subsequently extended and by the time it ended, in 1996, it had received 312 proposals and made 54 awards. The latter ranged in amount from £3,200 to £60,000 and covered a wide range of topics. However, it is interesting to note that the final report on the project states that, "It will be seen that the number of applications reduced steadily through the life of the scheme" [193]. The report suggests various reasons why this might have happened, and comments that:

> By the later years of the scheme, the feeling was also expressed by some authorities that their own funding could not be committed to projects in times of funding constraints; not only was matching funding a problem but, in some cases, the lengthy timetable of the Scheme was seen as inappropriate when there was a need to respond rapidly to local changes.

Many of the projects continued after the end of the P.L.D.I.S. Scheme, and many authorities benefited from the experience of working with new partners in both the public and private sectors. Indeed, marketing and collaborate ventures featured amongst the priority areas. However, not all authorities found the scheme to be the solution to their funding problems. For example, in 1993, the *Library Association Record* reported that Cumbria County Library had to reject two awards it had been offered under the P.L.D.I.S. because it could not make available the required matching funds [194]. The aim of 'Challenge Funding' is to provide a degree of assurance to those providing the finance that the receiving authority has a genuine commitment to the project. However, the requirement for matching funds may deter the less well off authorities from applying and it may further distort the overall spending pattern of the successful libraries libraries.

In England, the D.C.M.S. / Wolfson Public Libraries Challenge Fund has, since it was established in 1997, provided a major source of income for some public libraries [195]. A letter from the Department for Culture Media and Sport in April 1998 stated that £3 million would be made available in 1998/99 [196]. £2 of this was from the Department and £1 million was from the Wolfson Foundation. The funding was intended to support projects which established or developed I.T. network facilities in public libraries, and applications were encouraged for grants in the range of £100,000 - £250,000. The projects were expected to demonstrate long-term sustainability, and authorities were expected to contribute 50% matching funding (at least half of which was to be in the form of cash from either their local authority budget or another source). Securing such levels of funding would be more difficult for some Library Services than others, and could lead to further divisions between large and small authorities and between wealthy and poorer authorities. Indeed it is interesting to note that of the 18 successful bids in 1999, two authorities (Birmingham City Council and

Derbyshire County Council) had received an award each year it had been available [197]. In addition to this, the number of grants awarded was reduced over the years: in 1997 thirty public libraries were awarded a share of the fund, in 1998 twenty-one grants were made, and in 1999 only eighteen projects were successful [198].

By the year 2000, the D.C.M.S. / Wolfson funding had changed direction. It moved away from I.T. developments, aimed at helping libraries to participate in the People's Network, and towards the promotion of reading (both in general and in terms of targeting particular groups) and the enhancement of British history collections [199]. This year there was a further change in policy in that the matched funding element was reduced to 25% of the cost of the total project. The latter arrangements should open access to the awards to a greater number of authorities, although the scale of the projects is still likely to be large and, therefore, demanding in terms of staffing resources.

In contrast to the amounts available to public libraries in England, 'Challenge Funds' in Scotland are on a much smaller scale. For example, in April 1999, the Scottish Library & Information Council newsletter announced that, as a result of discussions between SLIC, the Scottish Office and the Scottish University for Industry Development Team, money was to be made available to public libraries to support the establishment of pilot Learning Centres [200]. The Scottish Office and Scottish Enterprise committed £102,000 to a 'Challenge Fund', and the projects were to secure a minimum of 25% partnership funding [201]. Six successful projects (in Angus, East Ayrshire, East Renfrewshire, Fife, Moray and Stirling) were announced in December [202].

A variety of other grants are also available to Scottish public libraries, but many are for relatively small amounts. For example, grants are awarded annually by the Scottish Library & Information Council (SLIC) for projects in one of a small number of priority areas. (The details are published in the SLIC 'Newsletter'). In 1999 over thirty applications were received and a total of £22,938 was allocated for the financial year 1999/2000, the maximum single grant being £6,500 [203]. In 2000/01 the grants ranged from under £1,000 to £6,500 [204]. At the SLIC AGM in June 2000 it was agreed that in future fewer grants should be allocated, allowing each successful project to receive a greater amount. Even so, the figures in question are not substantial.

Opportunities do exist, however, for Scottish libraries to bid for significant levels of funding for major projects, for example from European Union grants. However, the application procedure for the latter can be complicated and competition is fierce. As Johnson comments of European Union funding, "The success of a number of UK public library authorities has been heartening, but for others the exhaustive application procedures have been off-putting" [205]. In the U.S.A., many libraries that do not have substantial funds of their own have benefited from Gates Learning Foundation grants. For example, St. Lifer writes:

> Chicago and Seattle have been the beneficiaries of millions of dollars that will help them transform and update their entire systems. Los Angeles, Queens, and Brooklyn - as well as countless other libraries across the country - have made the most of Gates Learning Foundation grants, which have helped them provide much-needed Internet access to their patrons [206].

As St. Lifer reports in the *Library Journal* in 1997, "...Gates and Microsoft have been participating in connecting public libraries to the net since December 1995, with initial forays conducted through the Libraries Online! pilot program ...By the year 2002, Gates is seeking to wire to the net every library in every economically disadvantaged community - urban or rural -

in the country" [207]. To achieve this, Gates is providing $200 million in cash (for communications, training and support) and $200 million in software. In an interview with St. Lifer, Gates makes it clear that, "Microsoft is giving software to the library market" i.e. that this is "a philanthropic gesture" [208]. In October 1998 the *Library Association Record* included an article which commented that the Gates Library Foundation had "made its first step outside the US by appointing an International Library Programs Manager" [209]. The article then went on to speculate that, "..early indications are that, if any investment is made in the UK, it will be targeted on deprived areas rather than forming part of a larger programme".

In the U.K. the main source of funding for I.T. related activities is currently the 'New Opportunities Fund' (N.O.F.). It was established as a Lottery Distributor as result of the National Lottery Act 1998, and it is engaged in three programme areas [210]. £230 million has been allocated to train teachers and school librarians in the effective use of Information and Communications Technology, £20 million is available for similar training for public library staff, and £50 million has been assigned for digitising education and learning materials. The sums involved are significant, and enough to make a real difference to the level of training available. However, public libraries will need to plan how they will finance the ongoing training needs that will be constant feature in future years.

Prior to the establishment of the New Opportunities Fund, some libraries benefited from other sources of National Lottery funding. Indeed, the extent to which libraries are eligible for National Lottery funding was the subject of debate at a C.P.I. seminar in 1995 [211]. Of the five areas originally designated (arts, sport, national heritage, charities, and projects to mark the new millenium), the National Heritage Memorial Fund and Heritage Lottery Fund appear to be the most relevant to public libraries. Projects involving special collections, acquisitions,

conservation, cataloguing, improving public access, new buildings and extensions or refurbishment of buildings, are all considered potential beneficiaries of lottery funds. The funding is intended for 'additional' projects; it is not to replace money currently provided for the purchase of material in fulfilment of a local authority's statutory obligations. (Ironically, the difficulties that have been experienced in the past, in defining a 'core' service, may work to the advantage of libraries now, since a wide variety of activities and resources can be considered 'additional') [212]. Some libraries have benefited significantly from lottery funding, not just from the heritage grants but also from the Millenium Commission and Arts Council funds. For example, the public art scheme at Lincoln Central Library received over £61,000 in 1995 and the new Norfolk and Norwich Millenium Library forms part of a £60 million building that was awarded £30 million by the Millenium Commission [213].

For those libraries that choose to make the acquisition of grant funding one of their objectives, there is advice, and a wealth of opportunities, available. In addition to the national schemes, such as those described above, there are many charities and Trusts that provide funding for projects that meet particular criteria. Moore and Kempson discuss the organisations that provided grants, and the types of projects that received money, in the mid 1980s [214]. Lomax et al. list the sources of funding available in the mid 1990s [215]. Library literature provides many examples of projects that have been made possible through the acquisition of grant funding. However, as Gertzog warns, "Some librarians have found the sweet experience of winning a grant soured by an unexpected cut of a comparable amount in the next year's funding allocation" [216].

8.3.6 Sales, advertising and agency services.

In recent years, many libraries have started selling a range of products in order to meet the needs of users or to generate income. The sale of library publications is an established means of achieving both of these aims. For example, Oakeshott and White describe large-scale publishing activities that were taking place in Sheffield and the London Borough of Sutton in the mid 1980s [217]. They report that, in 1986, Sheffield Libraries had about forty titles in print, including postcards, maps, catalogues, illustrated local studies leaflets and books of local interest. Sutton had an even greater number of items in print, and Tilson's survey of public libraries in the London area in 1992 revealed that 90% of the respondents offered publications for sale (these included both publications produced by the library, or parent institution, and those produced elsewhere) [218].

Turner lists eleven reasons for library publishing [219]. These include: promoting an aspect of the Library Service, exploiting information that is already available, providing current community information, encouraging an awareness of the local heritage, promoting tourism and generating income. Local studies material often fulfils many of these criteria and, in Scotland, many of the successful publishing projects concentrate on this area. For example, Renfrew District Libraries have produced a series of 'Discover' books aimed at upper primary and lower secondary age pupils (an age group that requires local history material for project work, but for whom most of the available literature is too advanced) [220]. Glasgow City Libraries also have an extensive selection of publications including postcards, prints, bookmarks and books. One of the most successful examples of the latter is Michael Munro's *The Patter* (well over 100,000 copies of which were sold).

Another means of generating income that has been adopted by most libraries, is the sale of withdrawn stock. This can produce considerable sums of money, compared to the amount raised from the sale of new publications. However, as mentioned in the introduction to this thesis, there have been occasions when the sale of particular, antiquarian, items has resulted in controversy and adverse media coverage. For example, an item in the Scotsman newspaper in October 1997, refers to Stirling Council's ban on the disposal of rare books following the sale of a valuable 15th century item [221]. Similarly, later the same year, there were protests in Edinburgh at the proposed sell-off of 240 rare books [222]. Such activities result in the loss of existing assets (in terms of both the financial and the historical value of the items). They may also jeopardise potential future bequests, since people who are considering donating material may lose faith in a guarantee that the library receiving the collection will keep it for posterity.

Books are perhaps the most obvious item for libraries to sell, but some provide other merchandise as well. For example, Smith, commenting about the London Borough of Sutton, in a paper presented in 1987, states, "Our coffee shop is never empty and our book, jigsaw and souvenir sales produce a healthy profit and add to the spirit of the place" [223]. Sales on the scale of those in Sutton, however, appear to be rare in the late 1980s. Indeed, in an article about public libraries, which was based on the findings of a survey undertaken for *Which* magazine, in 1989, Land refers to library shops as a new idea:

> I was struck by the relatively high response in our survey supporting the introduction of video *hire*. If video hire, why not other income-generating services? National Trust shops, cathedral shops, art gallery and museum shops - all are commonplace these days... why not library shops? [224].

By the late 1990s, some libraries were selling a wide range of items and there was a considerable amount of discussion on the subject. For example, the lis-link and lis-pub-libs mailbase lists on the Internet included queries and answers relating to the establishment of

library shops and the sale of C.D.s and cassettes on a commercial basis [225]. There is also evidence that businesses are beginning to see libraries as useful outlets for their products. For example, since the deregulation of the reading glass market over ten years ago, at least one company has started supplying libraries with reading glasses to sell to the public (at a price that allows the libraries a profit margin) [226].

Even if commercial products are not sold directly, some libraries generate income through charging for advertising. Local politics may dictate whether it is deemed acceptable for libraries to engage in such an activity, and there may be restrictions on the type of products or services that are advertised. However, for those authorities that do wish to become involved in this area, there are companies that will provide the link between Library Services and the businesses that want to advertise. For example, 'Libad'/'Youth' (used by some Scottish academic libraries) and 'Visual Display Services' (used by some Scottish public libraries) provide posters from selected businesses, together with the appropriate picture frames, and pay libraries for displaying the material [227]. With I.T developments increasing the range of advertising possibilities (from Web page to screen saver adverts) this is an area of considerable potential for income generation.

As well as selling individual items, or advertising space, some libraries provide complete services to other organisations for a fee. For example, some provide a library service on an agency basis to schools, hospitals and prisons. The charges are not intended to generate a profit; they are intended to cover the costs of providing the service, or to contribute towards the costs.

Kent Arts and Libraries Department was one of the first to adopt marketing techniques to identify the services required by schools, and to introduce charges (in the form of a 'Learning Resources Subscription Agreement') for these services [228]. In Scotland, at the time that this was happening (i.e. in the early 1990s), budgets were not delegated to schools, and there was less activity in this area. Nevertheless, the provision of services from public libraries varied across the country as the Regional, Island and District Councils operated different systems: in the majority of cases the service was provided by Education Departments, but some public libraries were funded to provide full or support services [229]. A small number of private schools also purchased library services from their local authority [230].

As the 1988 LISC (S) survey on income generation illustrates, the principal agency services provided by Scottish libraries at this time were to penal establishments, hospitals and housebound people [231]. In the case of the former, a standard per capita rate is paid by central government. With regard to the provision of services to hospitals, public libraries usually have an agreement with the relevant Health Boards. The arrangements for services to housebound people vary according to local agreements. Moore and Kempson provide details of the funding of prison and hospital library services in the U.K. in the mid 1980s [232]. The findings of the 1988 LISC (S) survey, and the survey that was undertaken in 1996 for this thesis, are discussed in the following chapter.

CHAPTER NINE

INCOME GENERATION : SURVEY RESULTS

9.1 <u>The background to the survey.</u>

As discussed in chapter seven, fact-finding visits to selected public library services in 1994 and 1995 helped with the identification of key topics for inclusion in a questionnaire that was distributed to all Scottish local authorities in 1996. The third section of the questionnaire examines the extent to which the library services engage in activities designed to generate income. To allow comparisons to be made, some of the questions reflect those in a survey that was commissioned by the Library and Information Services Committee (Scotland) and undertaken, in 1988, by Brenda White Associates [1].

This chapter of the thesis considers the findings of the above visits and questionnaires. It also compares these results with those of a survey on income generation that was undertaken as the basis of an undergraduate dissertation in 1997/1998 [2]. Finally, in order to add to this insight into the developments that have occurred since the reorganisation of local government, it includes details of two case studies that were undertaken in 1999.

9.2 <u>Fact-finding visits in1994 and 1995.</u>

Discussions with members of staff in Kent County Council Arts and Libraries Department, in 1994, revealed that this library service generated income from a wide variety of sources. At the time of the visit the latter included fines for overdue books, reservation fees, the sale of withdrawn stock, and the hire of rooms. It also included the profit from vending machines and

commission from the sale of art work that was on display. A charge was made for some children's 'summer activities' and some events benefited from sponsorship (e.g. from South East Arts). Various items of stationery, etc., were sold in some libraries, and a 'Trading Services Manager' was employed. Each geographical group had a target for income generation but there appeared to be no pressure upon Group Managers to achieve this target by particular means. Within policy guidelines, librarians were free to provide and charge for those services most likely to generate a profit in their local area. As a result, a variety of fee-based services existed, ranging from extensive video collections to colour photocopiers.

The Scottish library services that were visited in 1995 appeared to display a less aggressive approach towards income generation. For example, none mentioned the existence of specific income targets (although, as the questionnaire responses in section 9.3.3.2 illustrate, this practice was employed by at least one large authority in Scotland). The visits revealed evidence of efforts being made by librarians to ensure that their prices (for example, for room hire) did not undercut those of other council departments. There was similar concern about the potential affect on local businesses. For example, one interviewee commented that their recommended fee for photocopying could be adjusted to ensure that the library did not charge less than the local Post Office. Moreover, three authorities had tried to avoid becoming engaged in conflict with local commercial video loan outlets. One had made a deliberate decision not to include feature films in its collection, one stocked only 'educational' subjects, and the other provided only 'information' and foreign language material.

The need to review fees regularly, and to increase them gradually, was highlighted by one interviewee. So, too, was the preference for setting charges at amounts (such as 10p) that were easy to collect. Exhibitions provided a small amount of income for some libraries where a

percentage of the sale price of art work was collected, and items on sale to the public ranged from local publications to magnifying glasses. There was variation with regard to the extent to which libraries sold stationery. One authority that had tried to sell cards had found little success and had subsequently abandoned the practice. Another avoided establishing 'shops within libraries' because of the potentially detrimental effect it could have on local businesses. However, elsewhere, sales did take place. One major city library even had plans to open a shop in neighbouring premises (selling items such as maps and prints derived from library holdings). More than one authority produced its own publications (either independently or as a joint venture with the private sector), but the objective for this appeared to be as much to fill a stock gap, or to make existing information more readily available, as to generate income.

There was evidence that some (successful) applications had been made for SLIC funding and for European grants. There was also evidence of sponsorship. (For example, Highland Region's library cards bear a reminder, from the Royal Mail, to use postcodes). The Scottish Arts Council and book suppliers ranked amongst those contributing finance for author visits, and a ferry company had funded prizes for a children's competition. Overall, however, the amount of income generated by the authorities that were visited was not substantial compared to the amount needed to provide each of the library services.

9.3 Responses to the 1996 questionnaire.

9.3.1 The purpose of the questionnaire.

The questionnaire was designed to elicit information relating to policies on charging and the constraints and incentives associated with income generation. It seeks details of the services

for which charges are payable, the range of items libraries sell to the public, and recent examples of sponsorship, grants, and joint ventures with the private sector. It also includes a question relating to staff training. An analysis of the responses (to part C of the questionnaire) gives an indication of the level of activity, and professional attitude towards, income generation in 1996.

9.3.2 Charging policies.

The first part of the questionnaire asked recipients to state their library's policy on charging for services. They were also asked to enclose a copy of the relevant policy document if possible. 29 responses were received. Only one respondent stated that no written policy was available, yet only 2 respondents provided additional papers which detailed the range of charges involved. Many others, however, provided a summary of their approach towards charging and information about some of their prices. The replies are listed in Appendix V.

Only one authority indicated a very positive approach towards charging, stating that there is a "requirement generally to increase income as a component of annual budget option". Another authority indicated that the introduction of fees was a possibility for the future, stating that, "At present there is a policy of not charging - this may change if further budget cuts are imposed". In contrast, a number of responses indicate that charges were kept to a minimum deliberately. The 'additional papers' that were enclosed reveal that at least one library service was employing differential pricing policies (in that the price of certain services varied according to whether the user was a resident or non-resident).

Of those authorities that listed the services for which fees were payable, the majority mentioned photocopying, fax, overdues and requests. Lengthy research was also cited as an

example of a service for which a fee is imposed, and 12 respondents indicated that borrowing audio-visual material incurred a charge. Interestingly, some of the latter were amongst those which refered to 'core services' being free, revealing that audio material, videos, and CDs, were considered outside the 'core service'.

9.3.3 Income generation: constraints and incentives.

9.3.3.1 Constraints.

Recipients of the questionnaire were asked to identify the two main constraints on income generation for their library service from the following list: lack of staff time, lack of start up costs, inability to use the revenue, professional attitudes, institutional policies, competition from local private businesses, fear of problems if the project is unsuccessful, or 'other' reasons. In the case of the latter, they were asked to provide further details. The responses are as shown in Table 35.

The responses from the seven authorities with a population less than 50,000 include three that identified the two main constraints (as requested), two which ticked only one category (one of which pointedly ticked 'staff time' twice), one which commented 'None', and one which ticked three of the categories. The responses with none, one and two ticks are included, the one with three ticks has been omitted. The results show that for authorities of this size, the practical issues of lack of staff time (50%) and lack of start up costs (33%) appear to be the main constraints. (Institutional policies and professional attitudes do not feature at all amongst the main constraints).

Table 35

Main constraints on income generation					
Library Service Area Population	Lack of staff time	Lack of start up costs	Inability to use revenue	Professional attitudes	Institutional policies
≤ 50,000	3 (50%)	2 (33 %)	0 (0%)	0 (0 %)	0 (0%)
50,001-100,000	6 (60%)	3 (30 %)	5 (50%)	1 (10 %)	2(20%)
100,001-200,000	7 (64%)	5 (45.5%)	1(9%)	5 (45.5%)	0 (0%)
>200,000	3 (50%)	1 (17%)	0 (0%)	0 (0%)	3 (50%)
Total	**19 (58%)**	**11(33%)**	**6 (18%)**	**6 (18%)**	**5 (15%)**

Main constraints on income generation					
Library Service Area Population	Local Comp.	Problems if unsuccessful	Other reasons	Missing 2nd reasons	No.of authorities replying
≤ 50,000	1 (17%)	1 (17%)	0 (0 %)	5 (83%)	6
50,001-100,000	0 (0%)	0 (0%)	3 (30%)	0 (0%)	10
100,001-200,000	1 (9%)	0 (0%)	1 (9%)	2 (18%)	11
>200,000	1 (17%)	0 (0%)	3 (50 %)	1 (17%)	6
Total	**3 (9%)**	**1 (3%)**	**7 (21 %)**	**8 (24%)**	**33**

Some library services in every population band cited lack of staff time as a main constraint. Overall this appears to be the main problem, with 58% of the 33 respondents identifying it as an issue. Lack of start up costs was also shown to be a major constraint for some library services in every band. Overall this was the second highest response, selected by 11 (33%) of the respondents. The responses to this question, however, reveal that there were regional differences, and differences according to the size of the authority. For example, the library services serving a population over 200,000 differed from the others in that half of them considered institutional policies to be a major factor restricting the extent to which charges

could be imposed. Had the questionnaire response that had three categories ticked been included in the analysis, it would have shown that 2 of the 3 island authorities identified 'local competition' (i.e. the potential impact on local businesses) as a significant issue.

Although, overall, only five authorities stated that institutional policies were a main constraint, political issues were a factor. One respondent stated that the "Council is not keen on associating the library with charges", and another replied that, "Charging for services is not compatible with public service paid for by the community in their council tax". Of the returns that identified 'other' factors of relevance, two gave 'customer resistance' as a main reason. Other replies included 'lack of specialist skills', 'low return for staff time', and 'time better used in providing effective services', suggesting that there is some concern about the extent to which the introduction of fee-paying services can detract from the mainstream service.

9.3.3.2 Incentives.

The questionnaire also asked respondents to identify, from a list, what they considered to be the two main incentives to generating income. The choices were: necessity (in order to maintain existing services), the opportunity to enhance the range of services provided, political importance, or another reason. Respondents were asked to provide details if the latter option was selected. The results are shown in Table 36.

Of the library services serving a population under 50,000, all 7 (100%) saw income generation as an opportunity to enhance the range of services they provided, and 4 (57%) identified 'necessity' as one of the main incemtives. Only one indicated that political importance was a major factor, and none identified any additional incentives.

Table 36

Library Service Area Population	Main incentives to generate income					
	To maintain existing services	To enhance the range of services provided	Politically important	Other	Missing 2nd reasons	No. of authorities replying
≤ 50,000	4 (57 %)	7 (100 %)	1 (14 %)	0 (0 %)	2 (29%)	7
50,001-100,000	4 (33 %)	9 (75%)	5 (42 %)	2 (17 %)	4 (33 %)	12
100,001-200,000	6 (60 %)	9 (90 %)	1 (10 %)	1 (10 %)	3 (30%)	10
>200,000	3 (75%)	3 (75%)	0 (0 %)	2 (50%)	0 (0 %)	4
Total	**17 (52 %)**	**28 (85 %)**	**7 (21 %)**	**5(15%)**	**9 (27%)**	**33**

Of the 12 library services within the population band 50,001 - 100,000 that responded, the majority (75%) saw the possibility to enhance services as a main incentive. Otherwise, the responses were varied: 5 (42%) considered political importance a significant factor, and 4 (33%) saw it as a necessity to maintain existing services. Of the 10 library services within the population band 100,001 - 200,000 that responded, the vast majority (90%) identified enhancing services as a main consideration. 6 (60%) stated necessity, and only one identified political importance as an issue.

Of the 6 library services serving a population in excess of 200,000, one left this question blank and one stated that, 'no major incentives operate at present'. Of the 4 that answered the question, 3 (75%) identified the necessity to maintain existing services as a key incentive. A similar number identified the enhancement of services as a main factor. The 2 remaining replies gave 'other' reasons. These were: 'to meet income targets', and 'public expectation to pay' (especially those requesting information from abroad).

As Table 36 shows, overall, the main incentive to generate income appears to have been more to do with budgetary pressures than political expedience. 28 (85%) of the 33 authorities that replied considered it important as a means of enhancing the range of services they provided, and 17 (52%) considered it an important way of avoiding cuts to existing services.

9.3.4 <u>Charges: trends in recent years</u>.

In order to identify whether there have been any significant trends relating to charges over the past five years, the survey included questions about increases in the level of fees/fines and the introduction of new charges. The replies to the question, "Over the past five years, have you increased the level of fees/fines charged (e.g. for overdues, reservations, video loans)?" reveal a clear pattern, as shown in Table 37.

Table 37

Library Services that have increased the level of fees / fines charged over the past five years?				
Library Service Area Population	Yes (Most)	Yes (Some)	No	Number of authorities replying
≤ 50,000	1 (14 %)	4 (57 %)	2 (29 %)	7
50,001-100,000	5 (42 %)	6 (50 %)	1 (8 %)	12
100,001-200,000	4 (33 %)	6 (50 %)	2 (17 %)	12
>200,000	5 (83 %)	1 (17 %)	0 (0 %)	6
Total	**15 (40.5 %)**	**17 (46 %)**	**5 (13.5 %)**	**37**

Overall, the vast majority (86.5%) of the authorities reported that they have increased the level of at least some of their charges within the past five years. In almost half of these cases, most of the charges have been increased. All of the library services serving populations over 200,000 have raised some of their fees or fines, and 5 (83%) of the 6 indicate that the increases affected most of the services for which charges are applicable. 12 replies were

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received from each of the middle-sized authorities. There was little variation between their responses: 6 (50%) library services in each category replied that they had increased some fees or fines, and the majority of the others stated that they had increased 'most'. Only 3 out of the 24 had not raised their charges. In contrast, 5 (71%) of the 7 authorities that served the smallest population band stated that 'some' or 'most' charges had increased, and 2 (29%) replied that they had not increased charges.

As Table 37 illustrates, there is a clear variation in the responses according to the size of the population served. Under three-quarters of the authorities serving less than 50,000 people had increased their charges, over 80% of those serving medium sized populations had increased their fees or fines, and all of the library services providing a service to over 200,000 people had raised their prices.

In response to the question "Over the past five years, have you introduced charges for any services which were free / unavailable previously?", a significant number (78%) indicated that they had not. Again, however, there was variation between the different groups (as shown in Table 38). The majority (67%) of the library services serving the largest populations had introduced charges, but none of those serving populations under 50,000 had done so. The two middle size groups gave identical responses: only 2 (17%) authorities having introduced new charges. The results show that, although overall there has been little attempt at introducing new services on a fee-paying basis or introducing charges for services that were previously free, there is a clear division between the activities of the larger library services and the rest. Considering these responses alongside those to the previous question, it appears that the majority of authorities have chosen to increase the level of fees on services for which a charge is already made rather than introduce charges in new areas.

Table 38

Library Services introducing fees for services which were previously free or unavailable.			
Library Service Area Population	YES	NO	No. of authorities replying
≤ 50,000	0 (0 %)	7 (100 %)	7
50,001-100,000	2 (17 %)	10 (83 %)	12
100,001-200,000	2 (17 %)	10 (83 %)	12
>200,000	4 (67 %)	2 (33 %)	6
Total	**8 (22 %)**	**29 (78 %)**	**37**

Libraries already have a history of charging for a wide range of services, common examples being the loan of videos, records and cassettes. The ASLIB *Review of the public library service in England and Wales* comments that, "The rationale of charging for the loan of audio and video materials, and not for books, is difficult to explain, but it would be unrealistic to suggest the abolition of these charges, at least in the short term" [3]. The report recommends that "no new direct charge for present library services should be introduced, and that the principle of free and equal access to library materials and services should be extended when conditions allow" [4]. It goes on to argue that when libraries make use of the 'information superhighway' there should be no charges to the user for accessing information which is available 'free' i.e. at no cost other than the telecommunications connection. The report, however, considers that charging for 'value added' services is acceptable: such services would include, for example, document delivery or lengthy searches to meet the needs of businesses.

The 1996 survey results, shown in Table 39, indicate that this approach has been followed to a large extent by the majority of the Scottish library services. For example, none of the 37 authorities that responded to this section of the questionnaire charged for the provision of community information, and only 2 (5%) charged for Internet access, whereas 7 (19%) charged for genealogical information. Only 3 (8%) of the authorities charged for business

information, however, only the larger library services have substantial collections in this subject area and, of the 6 that serve a population in excess of 200,000, 33% applied charges.

Table 39

Library services charging for selected special services.					
Library Service Area Population	Business information	Community information	Genealogical information	Internet access	No. of authorities replying
≤ 50,000	0 (0 %)	0 (0 %)	0 (0 %)	0 (0 %)	7
50,001-100,000	0 (0 %)	0 (0 %)	3 (25 %)	0 (0 %)	12
100,001-200,000	1 (8 %)	0 (0 %)	3 (25 %)	2 (17 %)	12
>200,000	2 (33 %)	0 (0 %)	1 (17 %)	0 (0 %)	6
Total	**3 (8 %)**	**0 (0 %)**	**7 (19 %)**	**2 (5 %)**	**37**

9.3.5 The financial basis of agency services.

Some libraries charge for providing services on an agency basis. Although not intended to generate income to produce a profit, this is another way in which libraries can offer services that they might not otherwise be able to afford. Recipients of the questionnaire were asked to describe the financial basis of agency services they provided to penal establishments, hospitals, the housebound and schools. The responses are shown in Table 40.

Table 40

The financial basis of agency services			
Institution served	Not applicable	Free	Charge applied	No. of authorities replying
Penal establishments	15 (48%)	0	16 (52%)	31
Hospitals	12 (40%)	16 (53%)	2 (7%)	30
Housebound	31 (100%)		0	31
Schools	28 (90%)		3 (10%)	31

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The figures show that the provision of services to penal establishments was the only major source of income for libraries. Where respondents provided additional comments, they took the form of statements that the amount charged was based upon the COSLA guidelines / Scottish Office formula. None of respondents provided free services to prisons. At the other extreme, none of the libraries charged for the provision of services to housebound people. Some respondents stated that this service was free; others commented that it was not provided on an agency basis since it was an integral (free) part of the library service.

Only 2 of the respondents replied that they received income to support the provision of services to hospitals. One stated that the amount was negotiated with the Health Trust, and the other commented that the Health Board was invoiced for the staffing costs. With regard to schools a number of respondents added comments (for example, explaining that the service was free because the mobile public library stopped at the school or because the pupils used the community library). Only 3 library services replied that they were involved in agency services: one had an arrangement with the Education Department, one just stated that a 'recharge' applied, and one indicated that it received an annual sum from the Region to provide the service.

9.3.6 <u>Sales</u>.

The survey included a question about the sale of items from libraries. It identified a number of standard items of relevance to libraries and asked whether they were available for sale i.e. books, cards, pens, bags, maps, videos, reprints from local studies collections, and refreshments. The results are shown in Table 41.

Table 41

Lib. Service Area Pop.	Books	Cards	Pens	Bags	Maps	Video	Rep. loc.st.	Refmt	No. of auth rep.
≤ 50,000	7 (100%)	3 (43%)	2 (29%)	3 (43%)	4 (57%)	2 (29%)	6 (86%)	0 (0%)	7
50,001-100,000	12 (100%)	9 (75%)	1 (8%)	7 (58%)	8 (67%)	3 (25%)	9 (75%)	1 (8%)	12
100,001-200,000	10 (83%)	7 (58%)	2 (17%)	8 (67%)	10 (83%)	4 (33%)	7 (58%)	3 (2%)	12
>200,000	6 (100%)	5 (83%)	0 (0%)	1 (17%)	5 (83%)	0 (0%)	3 (50%)	2 (33%)	6
Total	**35 (95%)**	**24 (65%)**	**5 (14%)**	**19 (51%)**	**27 (73%)**	**9 (24%)**	**25 (68%)**	**6 (16%)**	**37**

Table heading: Library Services selling items

The vast majority of library services (95%) sold books, a number of respondents specifying that this involved only the sale of old, withdrawn stock. The sale of videos appears to be much less common, with only 9 (24%) authorities engaging in this activity. However, with regard to the sale of withdrawn copies, the figures might reflect the fact that the provision of such materials is a relatively recent departure for many libraries and, therefore, there may be few items old enough to be sold off.

A large number of libraries (73%) sold maps, and a significant number sold reprints from local studies collections (68%) and cards (65%). Perhaps surprisingly, given the potential use to library users and the advertising opportunity afforded to the library services, is the fact that only 51 % sold bags and only 14 % sold pens. Only 16% provided refreshments and the sales profits from these did not get assigned to the library where the service was provided by a separate catering facility.

The list of 'other' items mentioned by respondents includes: gifts (badges, mugs, bookmarks, pencil sharpeners, etc.), framed and mounted prints, magnifying sheets, postage stamps, publications, cassette and CD recordings produced in-house, and tickets for local events.

9.3.7 Sponsorship.

As Table 42 shows, the survey revealed a wide variation in the number of library authorities obtaining sponsorship for different types of activity. The main activity attracting sponsorship appears to be author visits: 34 (92%) of the 37 library services which responded to the questionnaire stated that they had obtained support for such events.

Table 42

Library services obtaining sponsorship in the last five years							
Library Service Area Pop.	Author visits	Book weeks	Summer activities	Cultural events	Reading schemes	Other	No.of auth. reply-ing
≤ 50,000	6 (86%)	4 (57%)	1 (14%)	4 (57%)	1 (14%)	2(29%)	7
50,001-100,000	11(92%)	4 (33%)	8 (67%)	7 (58%)	2 (17%)	1 (8%)	12
100,001-200,000	11(92%)	2 (17%)	6 (50%)	7 (58%)	4 (33%)	1 (8%)	12
>200,000	6(100%)	5 (83%)	5 (83%)	5 (83%)	5 (83%)	4(67%)	6
Total	**34(92%)**	**15(41%)**	**20(54%)**	**23(62%)**	**12(32%)**	**8(22%)**	**37**

Of the 6 largest authorities, most were in receipt of sponsorship for the activities surveyed: all 6 (100%) obtained backing for author visits, 5 (83%) obtained support for book weeks, summer activities, cultural events and reading schemes. The smallest authorities (those with a population under 50,000) appear to have received sponsorship for a smaller range of

activities: 6 (83%) obtained support for author visits, but only 4 (57%) obtained support for bookweeks and cultural events, and only 1 (14%) obtained support for summer activities and reading schemes.

9.3.8 Grants.

Recipients of the questionnaire were asked whether their library services had received any major grants in the past five years. As Table 43 shows, 21 (57%) of the 37 that replied, had received such grants. The responses reveal a significant difference according to the size of the authority. Only 1 (14%) of the library services that served a population of less than 50,000 stated that it had received a major grant. In contrast, approximately 60% of the medium sized authorities, and over 80% of the largest authorities had obtained such funding.

8 respondents provided details of Scottish Library & Information Council grants, 7 stated that they had received finance from Scottish Enterprise, and 5 mentioned European Union funding. Grants had also been received from a variety of other organisations. These include: The British Patent Office and the British Library, The Scottish Office, the Sports Foundation, Unilever, The Langmuir Trust, and a newspaper company. (Full details are provided in Appendix VI).

Table 43

Library services receiving major grants in the last five years			
Library Service Area Population	Yes	No	No. of authorities replying
≤ 50,000	1 (14%)	6 (86%)	7
50,001-100,000	8 (67%)	4 (33%)	12
100,001-200,000	7 (58%)	5 (42%)	12
>200,000	5 (83%)	1 (17%)	6
Total	**21 (57%)**	**16 (43%)**	**37**

9.3.9 Joint ventures with the private sector.

The questionnaire included a question about joint ventures with other organisations. Only 8 (22%) of the 36 library services that replied to this question had been involved in such activities. (Four of the examples given were publishing activities).

As shown in Table 44, the level of participation was greater in the larger authorities. Only 1 (14%) of the library services that served a population of under 50,000 had engaged in such an activity. Only 2 (17%) of those with a population between 50,001 and 100,000, and a similar number in the authorities serving between 100,001 and 200,000, had undertaken a project of this nature. In contrast, 3 (60%) of the 5 large library services that replied to this question had experience of such ventures.

Table 44

Library services involved in joint ventures with the private sector in the last five years			
Library Service Area Population	Yes	No	No. of authorities replying
≤ 50,000	1 (14%)	6 (86%)	7
50,001-100,000	2 (17%)	10 (83%)	12
100,001-200,000	2 (17%)	10 (83%)	12
>200,000	3 (60%)	2 (40%)	5
Total	**8 (22%)**	**28 (78%)**	**36**

9.3.10 Staff training.

The replies to a question about staff training are shown in Table 45. Approximately half (46%) of the library services had provided some training in marketing techniques. However, only about a quarter had provided training in both marketing and financial management. Again, an analysis by size of authority reveals a marked variation in the level of activity. Only

1 (14%) of the library services serving less than 50,000 people had provided marketing training. In contrast, staff in 6 (50%) of the authorities serving between 50,001 and 100,000 people had received such training, as had staff in 7 (59%) of the authorities serving between 100,001 and 200,000 people. Staff in half of the 6 library services serving a population in excess of 200,000, had been involved in learning about marketing techniques.

Table 45

No. of authorities in which staff have received training in marketing techniques / financial management in the last year.					
Library Service Area Population	Yes (both)	Yes (marketing only)	Yes (finance only)	No	No.of auth. replying
≤ 50,000	1 (14%)	0 (0%)	0 (0%)	6 (86%)	7
50,001-100,000	2 (17%)	4 (33%)	1 (8%)	5 (42%)	12
100,001-200,000	5 (42%)	2 (17%)	0 (0%)	5 (42%)	12
>200,000	1 (17%)	2 (33%)	1 (17%)	2 (33%)	6
Total	**9 (24%)**	**8 (22%)**	**2 (5%)**	**18 (49%)**	**37**

9.4 Income generation: a comparison of questionnaire results (1988/1996).

9.4.1   The 1988 survey.

In 1988, a survey of income generation in Scottish public libraries was commissioned by the Library and Information Services Committee (Scotland). The survey, which was undertaken by Brenda White Associates, examined the types of activities that were taking place and the constraints and incentives faced by the library services [5]. A questionnaire was sent out in July 1988, to all 41 public library authorities, and 40 responses were received [6]. Some of the questions in the 1996 survey, upon which this thesis is based, are derived from the above work in order to allow comparisons to be made between the situation in 1988 and that eight years later.

9.4.2   Policies, constraints and incentives (1988/1996).

The 1988 survey concluded that, "The majority of public libraries have no firm policy with regard to charging for services" and that charges are usually introduced on an *ad hoc* basis [7]. It also found that there was a lack of consensus on what constitutes a 'basic' service, and that charges varied very much from one authority to another [8]. The responses to the 1996 questionnaire reveal that there was still a wide variation across the country in terms of both attitude towards charging and the range of charges imposed.

The questionnaire that was issued in 1988 asked respondents to state the main constraints they faced with regard to income generation. A list of examples was given: lack of staff time, inability to utilise revenue, authority or institutional policies, professional atttitudes, and statutory limitations. The replies indicated that the main constraint was staff time (which was mentioned by 25 (62%) of the respondents). The other main issues appeared to be professional attitude (mentioned by 11 (28%) of the libraries) and authority policy (mentioned by 8 (20%) of the libraries) [9].

The 1996 questionnaire also contained a question about constraints; it asked respondents to identify the two main factors involved. The list of possible answers (which are shown in Table 35) include four of the topics discussed above, and take into account the 'other' responses to the 1988 survey (such as 'lack of start up costs') and the comments made during the case study visits. The responses to the 1996 survey show that lack of staff time was still, by far, the most significant constraint. 19 (58%) authorities cited this a key factor. Professional attitudes appear to be less of a problem in 1996. Only 6 (18%) of the respondents gave this as a main reason. The results indicate that, by 1996, library staff, on the whole, did not

significantly oppose income generation: practical reasons such as staff time and lack of start up costs were the main deterrent.

With regard to the incentives to generating income, the 1988 survey identified the main reasons: 19 (48%) of the respondents mentioned enhancing the library profile, 18 (45%) mentioned expanding services, and 14 (35%) mentioned increasing revenue [10]. External pressures were mentioned by 6 (15%) of the respondents, and the exploitation of stock was the reason given by 5 (12%). These were the five examples given in the questionnaire. The 1996 survey gave just three example responses, representing the key areas discussed in the literature and during the case study interviews. However, the respondents also had the option to identify another reason of their own. (Respondents were asked to identify their two main incentives). Interestingly, even with only three suggested answers, political importance was only cited by 7 (21%) of the 33 respondents. The vast majority (85%) identified the chance to 'enhance the range of services provided' as one of their two main considerations, and just over half (52%) replied that the need or opportunity to maintain existing services provided a key incentive. In addition, 4 of the libraries that selected 'other' responses, stated that the reason was 'necessity'. A direct comparison of the results of the two surveys cannot be made since the questions in 1988 and 1996 were not identical. However, the findings indicate that, by the later date, income was being generated not so much for appearance or political reasons (as before), but more because the money was needed to continue delivering up to date services.

9.4.3   Charges for selected services (1988/1996).

The 1988 LISC(S) survey included a question about whether charges were made for the provision of business, community, tourist, or genealogical information, or for other special services. The report on the survey concludes that, "There are few exceptions to the rule of not

charging for such services" [11]. A subscription service for business users in Glasgow, two examples of authorities charging for genealogical enquiries, and one example of charging (businesses) for community information, are amongst the few details given.

The 1996 survey included a similar question, listing four services that the literature and case study interviews identified as possible areas where charges could be made. Community information and genealogical enquiries were again amongst those listed. The other two were services to business and Internet access. By 1996, a significant number of authorities (7 (19%) of the 37 that replied to this question) were charging for the supply of genealogical information (although in at least one case the fees were only applicable to non-residents). Charges for the other services listed were infrequent: only 3 (8%) of the library services charged for business information and 2 (5%) for Internet access. None charged for community information. The results reveal a general reluctance to charge for information in areas that could be considered to be 'core' services. With the exception of the increasing number of authorities charging for genealogical information, there was little change between the situation in 1988 and that eight years later.

9.4.4   Sales (1988/1996).

With regard to direct sales, the 1988 survey listed several categories of merchandise and asked the recipients of the questionnaire to identify those that they sold. The results show that 37 (92%) of the 40 Library Services that replied held booksales, 33 (82%) sold their own publications, and 15 (38%) sold publications other than their own [12]. (The authors of the report comment that the income received from the sale of the latter publications was negligible in library services other than Glasgow). Only 6 library services sold non-book items such as

badges, pens and plastic carrier bags (and this was partly for publicity purposes rather than as a means of generating income).

A direct comparison cannot be made between the results of the two surveys. However, the responses to the 1996 questionnaire indicate that, alongside a continuation in the sale of books, library publications, and other print material, libraries had expanded the range of merchandise available. 35 (95%) of the 37 library services that responded in 1996 were selling books, 27 (73%) sold maps, 25 (68%) sold reprints from local studies collections, 24 (65%) sold cards, and 19 (51%) sold carrier bags. A significant number (16%) were also generating income through the sale of refreshments.

9.4.5   Sponsorship, grants and joint ventures (1988/1996).

The acquisition of finance from other organisations (whether in the form of sponsorship, grant awards or joint ventures) is another subject that features in both the 1988 LISC(S) survey and that undertaken in 1996. The former revealed that Scottish public libraries were "not particularly active in seeking sponsorship" and that "where they do it is fairly small scale" [13]. Only 6 (15%) of the authorities replied that they were involved in such activities. 3 of these 6 were library services that were involved in the 1995 case studies, suggesting that the positive impression gained in the course of the interviews might not be typical of the situation across Scotland. However, the 1996 questionnaire returns indicated that 36 (97%) of the 37 authorities that replied had received some form of sponsorship for events (most noticeably for author visits).

There had been an even greater increase in the number of library services obtaining grants. The 1988 questionnaire related to the years 1987/88 and 1988/89 but only 4 (10%) of the authorities claim to have benefited from this source of funding during this time [14]. In contrast, the 1996 survey discovered that 26 (70%) of the 37 library services that replied had received major grants in the five year period prior to receipt of the questionnaire.

The 1988 survey reveals that joint ventures between Scottish public library services and the private sector predominantly took the form of publishing activities [15]. 5 authorities are listed as being engaged in such publishing ventures and, significantly, 3 of them were large cities. (The only other joint venture mentioned by the respondents involved 'planning gain' as a result of the transfer of premises). The responses to the 1988 questionnaire led the authors to conclude that, "joint enterprise is in very early days and largely confined to publishing". However, by 1996 there had been a considerable amount of development in this area. 13 (36%) of the 36 authorities that replied to this section of the later survey stated that they had been engaged in joint ventures with the private sector over the preceding five years.

9.5 Developments since 1996: the 1998 survey and 1999 case studies.

9.5.1 The 1998 survey and 1999 case studies.

This section compares the findings of the 1996 survey with results from a survey by Fraser in 1997/98 and with the 1999 follow-up case studies described in section 1.3.4.

An unpublished BA Honours dissertation by Fraser, that was produced in 1997/1998, examines "The implications and effects of charges in public libraries in Scotland" [16]. Amongst the topics that it investigates are: the reasons for charging for loans and services, the

extent to which certain categories of user benefit from concessions, the imposition of fees for specific services such as genealogical searches and business enquiries, and the views of the respondents with regard to future developments. The replies to the questions relating to these subjects are considered in the following sections of this thesis, alongside the comments made by library managers during two interviews in 1999.

Of the two library services selected as case studies in 1999, one covers the same geographical area and has changed little since the reorganisation of local government, whereas the other belongs to an authority that encompasses parts of three former district libraries. In the course of the meetings, the interviewees were asked the same questions that had been in the questionnaire that had been sent to them immediately prior to the reorganisation of local government. This time they were asked to comment upon the situation from April 1996 to 1999.

9.5.2   Policies, constraints and incentives (1996 / 1999).

Fraser's questionnaire was sent to all 32 of the new library services in Scotland in November 1997. 28 authorities responded and, of these, only 2 replied that they had no charging system in operation. The replies showed that the main reason for charging for both loans and services is to generate income. 10 (35.7%) cited income generation as the reason for loan charges, whereas only 3 (10.7%) identified 'Council policy' as an issue [17]. With regard to charging for services (such as reference enquiries or reservations), the majority (13 (46.4%)) again stated that income generation was a major factor. Only 2 (7.1%) selected 'Council policy' as a reason. The survey shows a continuation of the trend that had become apparent by 1996, i.e. a shift away from concern about income generation on ideological grounds, and a move towards more decisions based upon financial necessity.

Table 46

Income Generation: case study 1				
Sources of income	Library Service A: 1996 response	Library Service B: 1996 response	Library Service C: 1996 response	New Library Service: 1999 response
2 main constraints	Lack of staff time / Inability to use revenue.	Lack of staff time / Lack of start up costs.	Lack of staff time / Lack of start up costs.	Lack of staff time / Lack of start up costs.
2 main incentives	To enhance services. Politically important.	To maintain services. To enhance services.	To maintain services. To enhance services.	To enhance services. Politically important.
Increase in fees/fines (prev.5 yrs/since1996)	Yes (Some)	Yes (Most)	Yes (Most)	Yes (Most)
Intro. of new charges (prev.5 yrs/since1996)	No	Yes	No	Yes
Charges for Business Information	No	No	No	No
Charges for Community Info.	No	No	No	No
Charges for Genealogical Info.	No	No	No	Some
Charges for Internet access	Not provided	No	Not provided	Yes
Sale of books	Yes	Yes	Yes	Yes
Sale of Cards	Yes	No	No	Yes
Sale of pens	No	No	No	No
Sale of Bags	Yes	Yes	No	No
Sale of Maps	Yes	No	Yes	Yes
Sale of videos	No	No	No	No
Sale: local studies rep.	Yes	-	No	Yes
Sale of refreshments	No	No	No	Yes
Sponsorship for author visit(prev.5 yrs/1996-)	Yes	Yes	Yes	Yes
Sponsorship:bookweek (prev.5 yrs/since1996)	Yes	-	Yes	No
Sponsorship for Summer Activities (prev.5 yrs/since1996)	No	Yes	Yes	No
Sponsorship for Cultural events (prev.5 yrs/since1996)	No	Yes	-	Yes
Sponsorship for Reading schemes (prev.5 yrs/since1996)	No	Yes	Yes	Yes
Receipt of grants (prev.5 yrs/since1996)	Yes	Yes	No	No
Joint ventures (prev.5 yrs/since1996)	No	No	No	-
Staff training last year: marketing or finance.	Yes marketing only	Yes (Both)	Yes marketing only	Yes marketing only

Table 47

Income Generation: case study 2.		
Sources of income	Previous Library Service: 1996 response	New Library Service: 1999 response
2 main constraints	Lack of staff time. Institutional polices.	Lack of staff time. Other: affect on budget since income expected.
2 main incentives	Necessary to maintain existing services. Other: to meet income targets.	Necessary to maintain existing services. Other: to meet income targets.
Increase in level of fees/fines (previous 5 years/since1996)	Yes (most)	Yes (most)
Introduction of new charges (previous 5 years/since1996)	Yes	Yes
Charges for Business Information	No	No
Charges for Community Information	No	No
Charges for Genealogical Information	No	No
Charges for Internet access	–	Yes (but children's, limited access, free)
Sale of books	Yes	Yes
Sale of Cards	Yes	Yes
Sale of pens	No	No
Sale of Bags	Yes	Yes
Sale of Maps	Yes	No
Sale of videos	No	Yes (withdrawn stock only)
Sale of local studies reprints	Yes	Yes
Sale of refreshments	No	No
Sponsorship for author visits (previous 5 years/since1996)	Yes	Yes
Sponsorship for book weeks (previous 5 years/since1996)	Yes	Yes
Sponsorship for Summer Activities (prev.5 yrs/since1996)	Yes	Yes
Sponsorship for Cultural events (prev.5 yrs/since1996)	Yes	Yes
Sponsorship for Reading schemes (prev.5 yrs/since1996)	Yes	Yes
Receipt of major grants (previous 5 years/since1996)	Yes	Yes
Joint ventures with private business (prev.5 yrs/since1996)	Yes	No
Staff training in marketing or finance in last year	Yes (both)	Yes (finance)

As shown in Table 46, the library service involved in case study 1 in 1999 considered income generation important for political reasons as well as for reasons of necessity (to enable service enhancement). In case study 2, illustrated in Table 47, the two main incentives were to maintain existing services and to meet income targets. Both of the authorities identified lack of staff time as one of the two main constraints on income generation. One interviewee gave 'lack of start up costs' as the other reason, the other commented that the budget was based upon an expectation that a certain amount of income would be generated so there would be an adverse affect if the money was not acquired.

The findings of Fraser's research support the view that income generation was increasingly becoming a necessity. The responses to her questionnaire reveal that many libraries were not offering concessions to particular user groups; even children and senior citizens in some authorities were not exempt from full charges [18]. 24 (85.7%) of the 28 respondents offered concessions to certain categories of user, but those eligible, and the amounts involved, varied across the country. Less than half (42.8%) offered old age pensioners concessions, and only about a fifth offered such benefits to the unemployed or disabled people.

9.5.3 <u>Increases in existing charges and the introduction of new charges (1996/1999)</u>.

Case study 1 shows that, even though all three of the authorities involved had increased at least some of their fees or fines in the five years prior to local government reorganisation, the new authority had increased the levels again since 1996. Charges had also been imposed in some new areas. In case study 2, where most of the existing services that incurred fees had seen an increase in the level in the first half of the 1990s, the prices were again raised after

local government reorganisation. Similarly, although some new charges had been introduced in recent years, more were adopted after 1996.

It appears that the predictions of many of the respondents to Fraser's questionnaire were accurate. When invited to comment upon what they thought the future might be with regard to charges, a significant number were of the opinion that attempts would be made to generate more income by this means [19]. 8 (28.6%) of the respondents thought that charges would increase. 7 (25%) considered that charges would be introduced for new services. 4 (14.3%) were expecting more pressure to be put upon them to generate income, and only 3 (10.7%) had no plans to alter their existing policies.

9.5.4   Charges for selected services (1996/1999).

The responses to Fraser's questionnaire indicate that 21 library services provided assistance with genealogical searches, some offering a limited amount of time free before imposing a charge [20]. Of the 7 authorities that charged for the service, the amounts varied from £8 to '£15 per half hour'. Charges for business enquiries also varied and, in the case of the example given, the amount was considerably higher than that for genealogical information.

With regard to the two library services visited in 1999, both continued the practice of providing free business and community information (as had been the case in the corresponding pre-1996 districts). One authority still provided genealogical information free, but the other had introduced a fee for some aspects of this service. (As shown in Table 46, previously none of the three district library services had charged for this service). Both library services charged for using the Internet (although one allowed children a limited amount of access free). Two of

the former authorities had not provided this service at all, but the remaining one had provided free access.

9.5.5 Sales (1996/1999).

In terms of sales, the 1999 case studies suggest that the trend towards an increase in the range of non-print material being made available for purchase was continuing. Of the 8 items considered, books were the only item sold by all pre and post 1996 authorities involved in the case studies. In case study 1, two of the pre-1996 library services sold only two of the items listed (one of these being books). By 1999, books, cards, maps, local studies reprints, and refreshments were on sale. The latter had previously not been on sale in any of the three district libraries. In case study 2, books, cards, bags, and local studies reprints continued to be sold. Maps, which had previously been available for purchase, were no longer for sale. However, a new development was the offering of withdrawn videos for sale.

9.5.6 Sponsorship (1996/1999).

With regard to sponsorship, both of the library services involved in the case studies received this form of funding to support author visits, as had all of the corresponding former authorities. The library in case study 2 had previously obtained sponsorship for all five categories of activitiy listed i.e. author visits, book weeks, summer activities, cultural events and reading schemes. Its success in all of these areas had continued in the period after 1996. In case study 1, however, a more mixed picture emerges. Two of the former district library services had obtained sponsorship for book weeks, but the new authority had not. Similarly, although two of the pre-1996 library services had received funding of this type for summer

activities, the new authority had not. One of the former authorities had benefited from sponsorship for cultural events, and two for reading schemes. The post-1996 library services had been successful in both of these areas. Although no clear pattern of development emerges from these case studies, it is clear that a range of activities is still benefiting from this means of funding.

9.5.7   Grants (1996/1999).

In terms of the receipt of grant funding, the case studies also produced different results. In case study 1, two of the former three library services had obtained grants in the five year period prior to local government reorganisation, but none had been received between April 1996 and 1999. The library service in case study 2, however, had benefited from a number of grants both prior to 1996 and since then. Before 1996 this authority had received grants from the Britsh Patent Office and the British Library Research and Development Department. Since then, additional grants had been obtained from SLIC and the Scottish Cultural Resources Network (SCRAN).

9.5.8   Joint Ventures (1996/1999).

There appears to have been very little activity with regard to joint ventures in recent years. Case study 1 reveals that these library services had not been involved in such arrangements either before or after local government reorganisation. The library service in case study 2 gave three examples of joint ventures in which it had been engaged prior to 1996 (the production of limited edition prints, the publication of a biography, and the relocation of a branch library to larger, refurbished premises). However, the post-1996 authority had not been involved in such projects.

9.5.9 Staff training (1996/1999).

In case study 1, one pre-1996 library service had provided staff training in both finance and marketing; the other two had provided training in marketing only. The new authority had continued to provide training in marketing. The staff in the library service in case study 2 had received both marketing and finance training in the year prior to local government reorganisation, but only in finance since then. The links between the library services that provide marketing training and those that have undertaken marketing activities are explored in the following chapter of this thesis. So, too, are the trends and developments that emerge when the findings of the various surveys that have been investigated are drawn together.

CHAPTER TEN

DISCUSSION, CONCLUSIONS AND RECOMMENDATIONS

10.1 Discussion and conclusions.

10.1.1 The employment of marketing techniques.

The literature review in chapter two shows the diverse range of activities associated with the term 'marketing'. It examines the core elements of the marketing process, such as market research, and it considers the 'marketing mix'. The literature illustrates how the definition of marketing has changed over time; in particular in terms of the shift in emphasis from the product to the requirements of the customer. It emphasises the need to take into account the requirements and preferences of the users and potential users of the services when defining the mission and objectives of an organisation. It also shows that successful marketing campaigns are often attributable to the positive attitude of the staff involved.

The literature about marketing activities in U.K. public libraries reveals that much of the work to date has concentrated on promotional work and publicity. Less has been written on other marketing principles and practices. There are articles in both professional and academic journals that describe the marketing approach that has been taken towards specific projects, but most of what has been published refers to one-off initiatives rather than long term strategies or on-going campaigns. A possible explanation for this is that most of the research that is undertaken by library practitioners is intended for internal management purposes and is not made available to a wider audience through publication. However, the analysis of the responses to the questionnaire that was issued to all of the Scottish local authorities in 1996 confirms the fact that, at this time, the library services were undertaking only limited marketing activities.

10.1.2 Market research.

The survey that was undertaken in 1996 reveals that, with regard to market research, some library services had made only occasional attempts to use formal consultation methods to identify user needs, and in some cases very little work of this nature had taken place at all. The use of market research techniques in Scottish public library services at this time was variable and inadequate. Less than half of the authorities had interviewed users to ascertain their views, and less than half made suggestions boxes available. Even fewer, only a fifth, used focus groups as a means of obtaining information about user needs. Although the use of survey/questionnaires was more widespread, with nearly three-quarters of the library services claiming to have carried out work in this area, less than a third engaged in this activity at least annually. Almost all of the authorities analysed their statistics at least annually in order to find out information about user behaviour, yet even this market research technique was not used by all forty of the authorities that participated in the survey.

Only one of the library services employed all five of the market research techniques listed in the questionnaire at least annually. The frequency with which the other authorities undertook formal investigations was inadequate in terms of producing information upon which a library service responsive to current user needs could be established. Moreover, the limited amount of market research that was undertaken may have produced results that did not represent the views of a cross-section of the entire population. There is a danger that a small amount of public consultation may allow a vociferous minority of people to air their opinions at the expense of the views of the majority. This, in turn, may result in a distortion of priorities. It is only once market research is undertaken regularly and systematically that the results will achieve credibility.

The responses from the two library services that received a questionnaire in 1999 indicate that there was a slight improvement in the level of use of market research techniques by this time but, even then, not all of the methods listed were being used at frequent intervals. More work is required in this area to ensure that library managers are fully aware of the needs of the library users and to ensure that this information is available for consideration when service priorities are being identified.

10.1.3 Clarification of purpose.

The findings of market research, along with other factors (such as participation in co-operative schemes at national level), should influence the creation of a mission statement and the identification of objectives. The decision about which areas of the service to develop, and which to reduce, should depend upon the purpose of the organisation i.e. the selection of services should reflect the library's stated mission. However, the literature suggests that few libraries have defined their mission clearly. Most of the statements that have been publicised are so general and all-encompassing that they are likely to be of little use as a guide to service prioritisation or resource allocation. The results of the 1996 survey confirm the impression conveyed in the literature that, at this time, a significant number of libraries did not possess a clear, written mission statement with associated objectives or targets. Less than half (47.5%) of the Scottish public library services had a mission statement of any description and only 60%, had agreed objectives.

10.1.4 Efficiency, effectiveness and additional funding.

As shown in chapter three, the history of the public library service is one of change with regard to its customer base. Over the years, as shown in chapter four, it has also changed the range of services it offers as its purpose and focus has changed over time. Few libraries have managed to narrow their focus, and by the 1990s most were trying to provide a wide range of services to a wide range of users.

The results of the 1996 survey reveal that many of the authorities that undertook market research exercises to obtain the views of the users did not then use the information that was gained as a key part of the resource allocation process. The information supplied by the users about their needs and preferences was seldom considered one of the two main factors in the decision-making process. As shown in Table 11 (in chapter seven), resource allocation decisions were most often based on statistics of previous use and staff knowledge. About a quarter of the library services based resource allocation to a significant extent on historical factors, and a similar number made use of a formula. Only 7 (17.5%) of the authorities identified customer feedback as one of the two main factors in their decision-making. (Neither of the two authorities surveyed in 1999 identified 'customer feedback' as a key factor, suggesting that there has been little change in recent years).

The fact that over 80% of the forty library services that replied to the 1996 questionnaire had recently introduced new services indicates that a significant number of authorities were able to make some changes to meet new customer needs and demands. Slightly over a third of the forty library services had stopped providing some services for which there was a lack of demand. All of the latter were amongst those that had introduced new services, demonstrating that some

authorities were redirecting existing resources in order to allow developments to take place. However, there is no evidence to suggest that these changes were being made as part of a planned strategy. Moreover, in some cases service levels deteriorated, and few authorities could cope with demands for major new services. For example, the 1996 survey reveals that although, at that time, over half of the Scottish public library services did not have even staff access to the Internet, only 6 (15%) had a strategy for introducing this facility in future.

With limited resources, it is not possible for libraries to provide a high level service in all areas. However, if the users are made aware of the standard of service that they should expect to receive, there is less likelihood that they will be disappointed. Indeed, as the literature shows, in service industries many of the problems that exist are due to a gap between the customer's expectation and the product or service provided. With respect to libraries, both professional organisations and national bodies published documents, throughout the 1980s and 1990s, which recommend the standard of services that should be provided. These standards, which are described in chapter five, are useful in terms of identifying the minimum level below which services should not fall, but they do not solve the problem of meeting specific local needs. As the 1996 survey reveals, only 45% of the Scottish public library services had established their own local performance indicators or standards at this time and less than three-quarters had a formal complaints procedure in place.

If libraries do not have a mission statement, if they have not agreed the objectives and standards which they are aiming to achieve, and if they do not record customer suggestions, it is difficult for them to identify services that can be reduced or terminated. An alternative means of coping with restricted budgets is either to make efficiency gains (and reduce the costs involved in maintaining the existing services) or to generate additional income. According to the literature,

resource-purchasing practices, staffing arrangements, partnerships and joint ventures are amongst the areas in which library services could make changes in order to achieve financial savings. The 1996 survey revealed that, in order to reduce their operational costs, about half (47.5%) of the Scottish public library services had introduced some degree of change to their working practices. (For example, 5 (12.5%) of the library services were engaged in joint arrangements with other local authorities.) Ways appear to have been found to allow a continuation of the provision of services even where there were fewer people to undertake the work. (For example, 35 (87.5%) of the survey respondents stated that professional staff were undertaking a broader range of duties than previously, and only 4 authorities, 10% of those that replied to the questionnaire, had cut services as a direct result of staffing reductions.) The responses indicate that in some authorities a considerable amount of organisational change had taken place in order to accommodate altered circumstances.

Library services cannot continue making 'efficiency gains' indefinitely. They need to obtain more funding either by being awarded an increase in the budget allocation or by generating income from alternative sources. To achieve the former, they need the service to be visible. They need evidence of public support if they are to be considered for a significant share of the limited funds that are available for local services.

A survey of the literature indicates that many newspapers contain frequent references to public library services. The topics upon which they focus vary from letters from members of the public opposing branch closures to articles criticising the sale of stock to raise money. Quotes from politicians regarding the potential role of libraries in the I.T. revolution, and pleas from authors for funding commitments to support the basic bookstock feature amongst the coverage. At local level, some authorities have worked hard to ensure that newspapers publicise details of activities

at the library, yet 40% of the participants in the 1996 survey stated that they had no evidence of public support for the service. Given the importance of this issue, it is both surprising and disappointing that over half of the authorities gave such a response.

In the U.S.A., public support plays an important role in the decision about how tax money is allocated to public libraries. The extent to which referenda are used for this purpose is discussed in chapter eight. In order to find out if the respondents to the 1996 survey believed that the Scottish public would countenance such an approach, a question was asked about whether they thought their local community would be prepared to to pay an increased local tax in order to fund a major library development. A considerable degree of confidence was displayed in the responses, with a quarter replying YES. Of the remainder, 16 (40%) did not answer the question or stated DON'T KNOW, and only 14 (35%) stated NO.

If increased tax funding is not forthcoming, libraries may attempt to generate additional income through the imposition of fees for selected services. As illustrated in chapter eight, there are arguments both in favour and against charging for services. However, in recent years, financial constraints have resulted in many library services having to consider such a means of income generation. A considerable amount of library literature exists on the topic of income generation; numerous articles have been written on issues such as pricing policies, organising fund-raising events, and the availability of grants. The literature includes examples of the use of market segmentation to identify distinct groups (such as businesses) that are willing to pay for special services. It also reveals that there have been some very successful sponsorship projects in the U.K., such as the promotion of the Sir Thomas Lipton Collection by Glasgow City Libraries. However, there is evidence of a wide variation between the authorities in terms of income generation in general and the distribution of grants in particular. With respect to the latter,

lengthy and complex application procedures, combined with the common practice of requiring matching funding, make it difficult for some authorities to devote the resources that are necessary to achieve a positive outcome.

The responses to the 1996 survey reveal a wide variety of charging policies in existence throughout Scotland, with many authorities keeping fees to a minimum. With regard to the main constraints on income generation, lack of staff time and lack of start-up costs were identified as major issues. However, a significant number of authorities (18%) still considered professional attitudes a barrier. With regard to the two main incentives to generating income, the vast majority (85%) considered it an opportunity to enhance the range of services they provided. Over half (52%) considered it an important way of maintaining existing services, and only 7 (21%) considered its political importance a key factor.

A large proportion of the 37 authorities that responded to the question about whether they had increased the level of fees or fines in the past five years, replied that they had. 15 (40.5%) stated that they had increased most, and a further 17 (46%) replied that they had increased some charges. However, only 8 (22%) of the authorities had introduced fees or fines for services that were previously free or unavailable. The figures reveal a reluctance to change direction with regard to charging policies. The vast majority of library services have chosen to increase the level of fees, where a charge already applies, rather than to introduce fees for services that were previously free at point of use.

With regard to charging for special services, there is evidence that a distinction has been made, to some extent, between services of use to the whole community and services that are targeted towards the needs of particular users. For example, all of the library services that responded to

the questionnaire provided community information free, and all but two of the authorities that provided public access to the Internet did so without a charge. However, some authorities imposed a fee for the provision of more specialised information, notably genealogical and business information. None of the libraries charged for providing services to housebound people, but there was a degree of variation with regard to some of the 'agency services'. All of the library services that provided resources for penal establishments did so for a fee. However, only 3 of the libraries that provided resources to schools, and only 2 of the 18 authorities that provided library services to hospitals, applied a charge for the service. With the exception of the charges for providing library services to penal establishments, for which a recommended funding formula exists, Scottish authorities, in 1996, generally chose not to impose fees for the provision of information or reading material.

In contrast, however, the vast majority were involved in raising income from direct sales. 95% of the authorities that replied to this section of the questionnaire sold books and over 70% sold maps. Over 60% sold reprints of local studies material and a similar figure sold cards. A wide range of other of items were sold, ranging from badges to postage stamps. However, many of the libraries could expand the range of products they made available for sale. For example, only half of the authorities sold carrier bags and only 14% sold pens. Both of the latter are likely to be useful to library users, both provide potential advertising opportunities, and both could be sold at a price that generates a profit.

Sponsorship proved to be another popular means of generating income, but its potential was not fully exploited by all of the library services. Of the 37 authorities that responded to the question about sponsorship, 92% had obtained such funding for author visits, but far fewer had received this type of support for bookweeks, cultural events, reading schemes or summer activities. In

previous years, Kent County Council Department of Arts and Libraries had managed to obtain sponsorship for this full range of activities, demonstrating that this is an area in which more could be achieved by the Scottish authorities.

More could also be achieved with regard to the acquisition of grants. Only about half (57%) of the 37 authorities that replied to the question about grant funding had been successful in achieving major awards in the previous five years. The sources of funding varied considerably, from an independent Trust and private sector companies to the Scottish Office and the European Union. Grants are available for a wide range of projects, but more work is needed to encourage librarians to apply for these funds and to improve the number of successful applications. Similarly, more libraries could be encouraged to become involved in joint ventures with the private sector to generate income through activities such as publishing. Only 8 (22%) of the 36 authorities that replied to the question about such joint ventures had been engaged in activities of this nature in the five years preceding the survey.

10.1.5   Training

To achieve success in any of the above activities, library staff need to have the appropriate skills in both financial management and marketing techniques. The 1996 survey shows that, at that time, only 9 (24%) of the 37 authorities that replied to the question about training had involved staff in such instruction in the past year. A further 8 (22%) had provided marketing training only, and 2 (5%) had arranged training in finance only. Almost half (49%) had not been involved in either.

As shown in Table 48, there is a degree of correlation between the authorities that provided training in marketing and finance and those that engaged in market research and income generation. All but one of the authorities that participated in the survey analysed statistics of use to obtain information about user needs, but far fewer utilised the other market research techniques listed in the questionnaire. Of the 18 library services that provided no training, only 6 (33%) employed two or more of the market research techniques listed at least annually, and one did not engage in any market research this frequently. In contrast, 6 (66%) of the 9 library services that provided training employed at least two of the market research techniques at least annually. The authorities that did not provide training also showed a greater reluctance to move away from the historical basis of their budget allocation and to let levels of use and user needs influence their plans to a greater extent. 5 (28%) of the 18 considered historical arrangements one of the main factors influencing their decision-making, whereas only 1 (11%) of the 9 authorities that engaged in training identified this as being of significance.

Table 48

Training and levels of involvement in selected activities.		
Activities	No. of the 9 authorities that provided training that engaged in the activities listed.	No. of the 18 authorities that did not provide training that engaged in the activities listed.
Use of 2 or more of the market research techniques listed in the questionnaire at least annually.	6 (66%)	6 (33%)
Consideration of historical arrangements as 1 of the 2 main factors influencing budget allocations.	1 (11%)	5 (28%)
Receipt of sponsorship for at least 3 of the activities listed in the questionnaire.	6 (66%)	9 (50%)
Receipt of major grant funding.	6 (66%)	9 (50%)

Most (92%) of the authorities that replied to the question about sponsorship had received such funding for author visits, and almost two-thirds (62%) had received such funding for cultural events. However, far fewer had obtained sponsorship for the other activities listed in the questionnaire. Of the 18 authorities that had not engaged in training, only 9 (50%) had received sponsorship for at least three of the types of activities listed in the questionnaire, and one had not received sponsorship for any library events. In contrast, 6 (66%) of the 9 authorities that had provided training had obtained sponsorship for at least three of the types of activity listed. Of the 18 authorities that had not involved staff in either marketing or finance training, only 9 (50%) had recently received major grant funding. In contrast 6 (66%) of the 9 authorities that had provided training in both of these areas had been awarded grants.

The above details reveal the extent to which all of the Scottish public library services could make significant improvements in their marketing activities. They also indicate that, in 1996, the authorities that had provided recent staff training in marketing and finance employed a wider range of market research techniques and had been more successful in terms of the number of major grants they had received and the variety of events for which sponsorship had been obtained. However, there is no evidence to suggest that the training was in itself a significant factor in creating these circumstances. Indeed, the fact that training was provided might simply reflect the degree of importance the authorities attached to marketing and finance. If staff are trained in marketing techniques they should be better able to identify and exploit any opportunities that arise, but the environment in which they operate will dictate the extent to which these opportunities exist.

10.1.6 The extent to which a model of good practice exists.

Many of the Scottish public library services have undertaken marketing activities in particular service areas but, in 1996, none of them had in place a comprehensive marketing strategy. Thirteen of the library services had a mission statement as well as objectives and local performance indicators or standards. The majority of the 13 authorities displayed a positive approach towards the use of market research: 9 undertook user questionnaire surveys (and the remaining 4 were considering doing so), 6 interviewed users (and one was considering doing so), 5 had focus group meetings (and another 3 were considering organising them), 7 had suggestions boxes (with another 3 considering their introduction and one using a system involving comments forms instead), and 12 analysed statistics at least annually. Only one of the 13 authorities employed the full range of methods listed in the questionnaire to elicit information about user needs. Ironically, however, this authority did not identify either customer feedback or staff knowledge as one of the key factors upon which it based its resource allocation decisions: it identified its two main considerations as statistics of use and historical arrangements.

The 13 authorities that had established a mission statement, objectives and performance indicators or standards might be expected to be those with the clearest focus in terms of service priorities, those most interested in achieving their goals efficiently, and those most interested in comparing their performance with that of other library services of a similar size and composition. However, of the 19 library services that had changed working practices in order to reduce costs, only 6 were amongst the 13 identified above. Of the 19 that made use of performance information from other authorities, only 8 were amongst the 13 identified above.

An analysis of the responses to the questions in sections A and B of the questionnaire results in only one authority emerging as a model of overall good practice. This library service, which served a population in excess of 200,000, interviewed users and held focus group meetings. It was also considering the use of surveys by questionnaire. Statistics were analysed at least annually, staff considered the comments made through suggestion boxes, and there was a complaints and a request procedure in place. The library service had a mission statement, objectives and performance measures tailored to meet the specific needs of the service. Moreover, attention was given to studying the performance statistics of other authorities. Resource allocation decisions were based on staff knowledge and statistics of use (rather than a formula or historical arrangements) and services that were no longer required had been stopped. There is evidence of public support for this library service in the form of the results of a customer satisfaction survey (which details satisfaction levels with specific services and includes a profile of non-users).

There was a high level of confidence in the amount of public support that exists for the above service, as demonstrated in the positive response to the question about whether it was likely that the local community would be prepared to pay an increased tax in order to fund a major library development. Although the materials budget had decreased over the previous five years, and there had been a reduction in staffing levels and opening hours at some branches, the effect of the financial constraints had been minimised through efficiency gains involving changes to working practices and joint service arrangements with another authority. A number of new services had been introduced as a result of customer demand, and Internet access was available for staff and (limited) public use.

The responses to section C of the questionnaire reveal that the above library service's policy on charging was under review in 1996. During the five years prior to the survey, new fees/fines had been introduced and the level of existing fees/fines had been increased. A range of items were sold by this library service: books, cards, maps, reprints from local studies collections and (in the teenage library) refreshments. Sponsorship had been obtained for all of the events listed in the questionnaire: author visits, bookweeks, summer activities, cultural events and reading schemes. A 'Book Fair' was given as another example where sponsorship had been received. European funding had led to the opening of a new library, and Open Learning facilities had been made available as a result of a SLIC grant. Perhaps not surprisingly in this environment, staff had received training in marketing techniques within the previous year.

10.1.7 Variations according to local authority population size.

As discussed in chapter three, Midwinter and McVicar's study of the relationship between the size of an authority and its functional efficiency concluded that, although size was not the only factor determining the range and level of services provided, there was evidence of diseconomies of scale (with the smaller authorities incurring greater expenditure and requiring more facilities to provide a comparable service) [1]. The results of the 1996 survey show that the size of the authorities is also of significance in terms of the extent to which their library services engage in marketing activities.

The responses to the questionnaire reveal differences between the activities of the authorities that serve a small number of people and those that serve a population in excess of 100,000 or 200,000. This is evident in terms of the extent to which they had undertaken market research, changed their services and working practices to adapt to new circumstances, and employed new

methods to try to reduce their costs. It is also evident in the range of activities for which they had received external funding. The larger authorities had made progress in most of the above areas, while many of the smaller ones had achieved less.

The largest authorities (i.e. those with a population in excess of 200,000) had made more of an effort to obtain feedback from users. The most significant difference is in the extent to which the library services had undertaken user interviews and established focus groups. (Half of the large authorities had been involved in the latter activity, whereas none of the smallest authorities (i.e. those with a population under 50,000) had engaged in such activities.) With regard to customer complaints, only 43% of the smallest authorities had a reporting mechanism in place, whereas over 60% of the authorities in each of the other population bands had a formal procedure. Only 17% of the largest authorities considered historical arrangements one of the two main factors affecting their resource allocation decisions, whereas the figure for the smallest authorities was 29%.

As shown in Table 12, there was also variation between the authorities in terms of the introduction of new services as a result of customer need or demand. Only 57% of the smallest authorities had done so, whereas over 80% of the library services in each of the three larger population bands had made such changes. Only 14% of the smallest authorities had ceased services as a result of a lack of demand, whereas over 30% of the authorities in each of the larger population size bands had done so. With regard to the provision of Internet access, there is significant variation between the authorities according to size. Availablility for staff use is limited to under 30% of the authorities with a population of under 50,000 and 50,001 - 100,000. In contrast over 60% of the authorities with population of 100,001 - 200,000, and over 80% of the largest authorities, provide such facilities. Similarly, although over 80% of the large library

services had e-mail facilities, the figures for the others were less impressive: only 6 (17%) of the other authorities had this facility. Only 5 of the 40 library services that replied to the questionnaire provided public access to the Internet, the group with the highest percentage (17%) being those that served a population in excess of 200,000.

Less than 30% of the library services serving a population of under 50,000 had a mission statement, as did less than 40% of those serving between 50,000 and 100,000 people. In contrast, over 60% of those serving a population of between 100,000 and 200,000 possessed such a statement, as did over 60% of the largest authorities. The corresponding figures for library services with agreed objectives were: less than 60% for each of the two smallest population bands and over 60% for each of the two largest. The distinction by population size is even more marked with regard to the existence of performance standards or indicators tailored to meet the needs of the authority: only 14% of the smallest authorities had such standards, but 43% of those with a population of 50,001-100,000, 54% of those with a population of 100,001-200,000, and 67% of the largest authorities had established such measures. Only one (14%) of the library services serving a population of under 50,000 had all three of these management tools (i.e. a mission statement, objectives and local performance indicators or standards). In contrast, the figures for the other size bands were: 29% of the authorities with a population of 50,001-100,000, 46% of those with a population of 100,001 - 200,000, and 33% of those serving over 200,000 people. Only 29% of the library services serving under 50,000 people, and a similar percentage of those serving a population of 50,001-100,000, made use of performance indicator information from other authorities for comparative purposes. In contrast, over 60% of the library services in each of the two larger population size bands made use of this information.

As discussed above, 40% of the participants in the 1996 survey stated that they had no evidence of public support for the service. Significantly, there was variation between the authorities according to their size. All 6 of the largest authorities replied that they had such evidence (and some emphasised the point by including relevant details along with their completed questionnaire). In contrast, only 57% of the smallest authorities, and even fewer of the libraries in the other two size bands, gave a similar reply. However, with respect to the respondents opinion about whether the local community would be prepared to pay additional taxes in order to support a major library development, the responses showed a decreasing percentage of 'yes' replies in each successive population band. Over 40% of the respondents representing the smallest authorities thought that their community would support such a proposal, whereas only 20% - 30% of the respondents in each of the next two population size bands thought their local community would. None of the respondents representing the largest authorities thought that their local community would give a positive response to such a proposal.

A higher percentage of the largest authorities had changed working practices to reduce costs: 67%, as opposed to only 43% of the smallest authorities (i.e. those with a population under 50,000). None of the smallest authorities had been involved in joint ventures with other local authority library services, whereas 50% of the largest authorities had engaged in such activities. 60% of the largest authorities had been involved in joint ventures with the private sector, within the five years preceding the survey, whereas only 1 (14%) of the smallest authorities had gained similar experience. Moreover, professional staff were undertaking a broader range of duties in over 80% of the library services in the three largest population size bands compared to only 57% of the library services in the smallest authorities. The latter situation may reflect the fact that the staff in the smaller library services were already undertaking a wide range of duties.

Nevertheless, it illustrates a greater degree of flexibility in the larger authorities: they were in a better position to adapt to new circumstances.

With regard to income generation, there were also variations between the authorities of different sizes. In response to a request to identify the two main constraints, 3 (50%) of the 6 largest authorities identified institutional policies as a key factor. In contrast, only 2 (7%) of the other 27 library services that replied to this question gave such a response. Lack of start up costs, which was of concern to at least 30% of the library services in each of the three smaller population size bands, was only a significant consideration for 1 (17%) of the authorities serving a population in excess of 200,000. With regard to the incentives to generate income, the main area of difference was the extent to which it was considered politically important. None of the largest authorities considered this to be one of the two main factors, yet there was a positive response from some authorities in each of the other three population size bands.

There was also a variation, according to the size of authority, in the 37 responses to the question about whether the level of charges had been increased in the previous five years. 5 (83%) of the 6 large authorities had increased most fees or fines, and the other one had increased some. At least one authority in each of the other size bands had not increased its charges, and well under half of the authorities in these size bands had increased 'most' of their charges. The extent to which fees had been introduced for services that were previously free or unavailable also varied significantly depending upon the size of the authority. 4 (67%) of the largest authorities had done so, whereas only 17% or less of the authorities in each of the other three size bands had done so.

All of the largest library services had obtained sponsorship for author visits, and over 80% had received such funding for bookweeks, summer activities, cultural events and reading schemes. Far fewer of the smaller authorities had been so successful. Less than 60% of the library services in any other size band had received sponsorship for bookweeks, cultural events or reading schemes. Indeed, only 1 (14%) of the smallest authorities had obtained sponsorship for summer activities and reading schemes.

83% of the largest authorities had received major grants in the five years preceding the survey. In contrast, only 1 (14%) of the smallest authorities had been so fortuitous. With regard to sales, however, no such clear pattern emerges. The largest authorities were very active in some areas; a high percentage sold books, cards and maps. Yet, surprisingly, only 50% of them sold reprints from their local studies collections. A higher percentage of library services in all three of the smaller size bands sold the latter and, compared to the six large authorities, a higher percentage of the smaller ones sold pens and bags.

With regard to training, only 1 library service in the largest size band, and 1 in the smallest, had provided staff training in both marketing and finance in the course of the year preceding the survey. However, 2 (33%) of the largest authorities had provided training in marketing, and another 1 (17%) had provided financial training. None of the smallest library services had made similar arrangements. Consequently, 67% of the largest authorities could claim to have provided some form of relevant training, whereas the figure for the smallest authorities was 14%.

Previous research has shown that economies of scale produce significant benefits to the larger authorities in terms of the cost of providing services. The current research has found that the larger library services are further advanced in terms of undertaking the marketing that is required

to cope with the difficulties associated with reduced budgets, increased accountability and political demands. Clearly there is a division between the large and small authorities and, as one of the interviewees suggested during the pre-survey visits in 1995, there is a danger that it could increase. Two factors, however, allow a more positive view to be taken with regard to the future. Firstly, with regard to individual activities, examples of good practice do exist and, with better sharing of expertise, they may be used as models for the future. Secondly, the reorganisation of local government in 1996 created larger local authorities and, given that size is a significant factor, the resultant new library services should be better placed to cope with the demands placed upon them.

10.1.8 Developments since 1996.

Only one of the two new library services had a mission statement but both had objectives and local performance indicators or standards. There was also evidence of interest in 'family benchmarking'. One library service compared its performance with that of other similar authorities, and the other library sevice was planning to undertake a similar exercise. (Previously only two of the four authorities had made use of performance indicator information from other authorities for comparative purposes). There was, however, no evidence to show that internal benchmarking was taking place after the new authorities were created.

The budgetary situation had continued to decline. Both of the new library sevices had changed working practices in order to save costs, and staff in both authorities continued to undertake a broader range of duties. There was no change with regard to joint ventures: the authority that had been involved in such activities previously continued to be, but the authority that incorporated parts of three former library services that had not engaged in such ventures continued to avoid

such involvement. There was also no significant development with regard to the generation of income. (If the energy involved in the reorganisation had been devoted to marketing activities, and if best practice had been adopted, it might have been possible to generate more finance from external organisations rather than continuing to rely upon the client base).

The most obvious area of improvement was associated with Internet access. None of the four library services that previously covered the geographical area of the two post-1996 authorities provided public access to the Internet. By 1999, both of the new authorities offered this service. The surveys by Batt, Newton et al., and Templeton reveal a steady increase in the number of authorities providing Internet access in successive years [2]. Although the reduction in the number of library services after the 1996 reorganisation makes direct comparisons difficult, the results of the latter surveys give some indication of the amount of progress that has been made. The figures provide clear evidence of a growing number of authorities making available public access to the Internet (although, given the number of library services that did not have a strategy for its introduction, it is questionnable whether it is being exploited to best advantage in all cases). Once again it is the smaller authorities that appear to be lagging behind in terms of service development. However, the government's decision to input substantial sums of money into Internet developments for schools and libraries should help to create a situation where even the library services that are least well provided for meet a minimum standard in the near future. The problem that needs to be addressed now is how to ensure that the gap between the large and small authorities does not further increase once the current special funding comes to an end.

10.2 Recommendations.

10.2.1 Action by library staff.

The research has shown that there are many ways in which public library staff can improve the service they offer through the effective employment of marketing techniques. Key to the success of any project of this nature is the full support of the employees involved. The attitude of professional staff, in particular, is important in terms of both achieving results and establishing a positive approach towards the change. As the 1996 survey revealed, improvements are still required in this area. For example, librarians need to change the emphasis in their resource allocation decisions away from the views of the service providers in favour of the service users. With regard to income generation, professional attitudes have softened in recent years, as economic necessity has forced an increasing number of libraries to introduce charges for selected services, but, with staff who are enthusiastic about this, much more could be achieved. In addition to having a positive attitude, staff need to have the appropriate skills and understanding to undertake a successful marketing programme. Many more library staff need to receive training in marketing techniques and associated financial matters.

The research has shown that although numerous isolated examples of marketing practice exist, few library services have a comprehensive marketing strategy. As a first step towards this, library managers need to introduce a more structured approach towards market research and obtaining user feedback. The information should be acquired from a representative cross-section of users and non-users in the local area, and it should be collated in a way that allows comparisons to be made over time and with other, similar, authorities. More use should be made of the information gained from users: it should be a significant contributory factor in the formulation of the library service's mission statement, aims and objectives. There should also be

a more obvious link between the views expressed by the users and the allocation of resources. The information obtained from market research should not, on its own, dictate the direction in which the service moves, but it should be used to inform decision-making about which services should be provided, where and by whom they should be provided, and at what cost. Market research should not be carried out as a political exercise or as an end in itself: the aim is to obtain information that allows priorities to be established and improvements to be made to the services provided to the users.

All library services should produce a mission statement and determine objectives and local performance indicators and standards that reflect the needs and preferences of their users. Commitments to local or national co-operative schemes, and the availability of alternative sources of similar resources or services, should also be taken into consideration when defining the purpose, or mission, of the library service. Furthermore, as a public service, supported by income from taxes, the library service should take into account the effect on local businesses if it is considering offering services (such as photocopying or video loans) at a subsidised rate.

Having decided which services they intend to provide, library managers should make their intentions known to the public. They should publicise their mission statement and objectives along with details of the standard of service they aim to provide. At a time of financial constraint, rather than adopting a 'safe' approach and reducing the budget across a wide range of services (thereby gradually eroding the whole library service), library managers should concentrate on investing in the areas key to their identified mission. The introduction of new services should not be delayed or stopped automatically because of budget restrictions: there may be existing services that could be reduced, or cease altogether, to free up funds. There must be a clear strategy for introducing change. It is unsatisfactory to place too much reliance upon

formulae or historical arrangements when planning the distribution of the budget. Some of the Scottish authorities need to adopt a more confident approach towards changing priorities and associated resource allocation since, in the words of Hannabuss, "Ultimately, what the library manager is aiming to achieve is a flexible, responsive, forward-looking information service" [3].

Working practices should be reviewed at regular intervals to identify where efficiency gains can be made. In some circumstances (for example, where a large sum of money is required for a major development, such as upgrading the I.T. infrastructure) it is likely to be more productive if libraries co-operate. Once all libraries have identified their mission and objectives, in line with local needs, it should be possible to identify areas common to most, or all, of the authorities. At that stage efforts could be made to address these issues at national level. The findings of this thesis suggest that more co-operation and resourcing at national level is needed to ensure that the gap in service levels between the large and the small authorities, that was evident in 1996, does not increase in future years.

Libraries need to raise their profile at both national and local level, and library managers need to be more aware of the value of media coverage. The government's enthusiasm about the role libraries can play in helping to meet the I.T. needs of modern society is an excellent opportunity to raise public awareness of the importance of the service. Library managers need to ensure that this opportunity is not wasted. They should gather evidence of public support, monitor media coverage, and, at local level, draw attention to the damage that could be done politically if the electorate sees the library service being under-funded and branches being closed. They may add to the pressure upon the budget decision-makers in local government by emphasising how little is needed, relative to the amount spent by some other council departments, to bring about major improvements in terms of the range and standard of library services provided.

A different approach is required, too, with regard to income generation. The more organised and aggressive approach towards library fund-raising that has been adopted in the U.S.A., and identified by Potts and Roper, could be used as a model in the U.K. [4]. Moreover, library managers need to ensure that details of successful campaigns and events, like any other examples of best practice, are written up and publicised throughout the profession at large.

Of particular concern in terms of income generation is the divide between the larger and smaller authorities with regard to their ability to acquire additional funding. The smaller authorities may find the resource input required to make a successful grant application prohibitive. In particular, the need to provide matched levels of funding is likely to restrict the smaller library services to smaller scale projects. However, there are other ways of ensuring a serious degree of commitment to a new development and, as shown in chapter eight, it is possible for grant awarding bodies to reduce the proportion of funding required from participating library services. Library managers need to encourage such developments which, although part of a competitive arrangement, are beneficial to all of the libraries involved. Given that libraries are operating within a competitive environment with regard to grants and sponsorship deals, it is essential that more staff receive training in the appropriate marketing and financial skills. A significant amount of staff time can be involved in making grant applications and undertaking fund-raising initiatives but success becomes more likely as experience is gained.

10.2.2 Further research.

This thesis has highlighted a number of areas in which further research would prove useful. As indicated above, there are many ways in which public library managers can make improvements to their marketing with a view to improving services. However, they would be helped in this task

by the availability of further information about successful projects. In particular, now that the new local authorities have been in operation for some time, it would be useful to know if the libraries that have been incorporated into larger authorities have benefited from the necessary expertise and funding that was previously denied to them. An analysis of the extent to which library services now employ marketing activities would show the changes that have occurred over time and might add weight to the view that the size of the population served is of significance.

Professional attitude has been shown to be an important factor in the success of marketing projects. Further research is now needed regarding how to alter the attitude of librarians towards more user-focused services and in favour of income generation. Legislation and government advice has produced changes relating to the former, and economic necessity has affected the extent to which libraries have engaged in the latter. However, a more fundamental change is now needed if libraries are to fully exploit the opportunities available to them and, indeed, if they are to survive in an increasingly competitive environment.

As the Public Libraries Research Group identified, in 1997, in its list of strategic research issues in need of attention, it would be useful to review the current situation with regard to income generation and to identify any trends and developments that have occurred since the LAMSAC report was published in 1988 [5]. It would also be useful if future research analyses the indexing of articles relating to library fund-raising and marketing in the major bibliographic search tools: at present there is a degree of inconsistency which makes it difficult to locate relevant information. Where practitioners have taken the trouble to publish articles describing examples of good practice, it is important that this information is made available as widely as possible.

<u>CONFIDENTIAL</u>

Name of Library (Current District)..

District(s) from 1st April 1996.... ....

Name / Grade of person completing this form..

Would you like to receive a summary of the results ?   YES / NO

A. EFFECTIVENESS

1.Please circle the response which indicates the extent to which you engage in the following
   activities in order to obtain information about user needs / preferences :

User surveys/questionnaires : At least annually / Less than annually / Considering / Not at all

User interviews :   At least annually / Less than annually / Considering / Not at all

Focus Groups :   At least annually / Less than annually / Considering / Not at all

Suggestions Box :   At least annually / Less than annually / Considering / Not at all

Analysis of usage statistics :   At least annually / Less than annually / Considering / Not at all

Other means, please specify...

2. Please tick the 2 responses which best describe how you decide the allocation of resources
   between services / branches, and the level of services provided :

Historical arrangements ....   Staff knowledge ....

Formula funding   ....   Statistics of use ....

Customer feedback   ....

Other, please specify (eg. directive from outwith the library)...

3.Have you introduced any new services recently as a result of customer demand / known
   customer need (eg. Sunday Opening, Services to Business)?   YES / NO

   If yes, please give examples...
   ....

   How did you become aware of the need for these services...
   ....

4.Have you stopped providing any services recently because of a lack of customer demand?

YES / NO

If yes, please specify..

5.Do you have a 'Mission Statement' ? YES / NO

If yes, please would you provide a copy if possible.

6.Do you have specific 'Objectives' for the Library Service?   YES / NO

If yes, please would you provide details if possible.

7.Do you have 'Performance Standards / Indicators' tailored to meet the specific needs of your Library Service ?   YES / NO

If yes, please would you provide details if possible.

8. Do you have a formal complaints procedure ?   YES / NO

9.Do you have any evidence of support from the public for your Library Service (eg. Opinion poll results, 'Friends of the Library' groups, media coverage of opposition to branch closures) ?   YES / NO

If yes, please provide examples..

10. Do you think your local community would be prepared to pay an increased local tax in order to fund a major library development ? YES / NO

11. Do you provide access to the Internet :

For staff use   YES / NO

For e-mail   YES / NO

For public use   YES / NO

Own WWW page   YES / NO

12. If a need for public access to the Internet emerges in the near future, do you have a strategy in place to allow you to overcome the associated technical and financial problems ?

YES / NO

If yes, please provide details..

....

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B. EFFICIENCY

1.Over the past five years, has your materials budget :

Increased over and above inflation   ....

Increased in line with inflation   ....

Increased less than inflation   ....

Decreased   ....

2.Over the past five years, have any services ceased <u>as a direct result of a reduction in your materials budget ?</u>

YES / NO

If yes, please specify..
....

3.Over the past five years, have you introduced any new services <u>as a result of an increase in your materials budget ?</u>

YES / NO

If yes, please specify..
....

4.Over the past five years, have you changed any working practices in order to reduce operational costs (eg. selecting stock from catalogues instead of going on shelf - buys) ?

YES / NO

If yes, please give examples..
....

5.Over the past five years,have any services been cut as a direct result of staffing reductions?

YES /NO

If yes, please specify..
....

6.Are professional staff in your Library Service expected to undertake a broader range of duties now compared to five years ago ?

YES / NO DIFFERENCE / NO

7. Do you employ any professionally qualified staff in Support jobs?

  YES / NO

8. Which services does your library contract out ?
....
....

9. Do you have any joint service arrangements with any other local authority library services (eg. joint cataloguing, shared approvals collections) ?

  YES / NO

  If yes, please specify ....
....

10.Do you make use of Performance Indicator information from other authorities in order to assess the efficiency of any of your own operations (eg. speed of processing new stock) ?

  YES / NO

  If yes, please provide examples ....
....

C. INCOME GENERATION.

1.Please state your Library's policy on charging for services. (If a written statement of policy exists, please enclose a copy if permissible).

....

....

2.What do you see as the **2** main constraints on income generation for your Library :

Lack of staff time   ....

Inability to use revenue   ....

Institutional policies   ....

Professional attitudes   ....

Lack of start up costs   ....

Competition from local private businesses   ....

Fear of problems if the project is unsuccessful   ....

Other, please specify   ....

3. What do you see as the **2** main incentives to generate income :

Necessary to maintain existing services   ....

Opportunity to enhance the range of services provided   ....

Politically important   ....

Other, please specify   ....

4. Over the past five years, have you increased the level of fees / fines charged (eg. for overdues, reservations, video loans) ?

YES (Most)   /   YES (Some) / NO

5. Over the past five years, have you introduced charges for any services which were free / unavailable previously ?

YES / NO

If yes, please specify ....

....

6. Do you charge for the following :

Business Information	YES	NO	SOME	SERVICE NOT PROVIDED
Community Information	YES	NO	SOME	SERVICE NOT PROVIDED
Genealogical Information	YES	NO	SOME	SERVICE NOT PROVIDED
Internet Access	YES	NO	SOME	SERVICE NOT PROVIDED

7. Please describe the financial basis of agency services provided to :

Penal Establishments ....

Hospitals ....

Housebound ....

Schools ....

8. Do you **sell** any of the following :

Books	YES / NO		Bags	YES / NO
Cards	YES / NO		Maps	YES / NO
Pens	YES / NO		Videos	YES / NO

Reprints from local studies collections   YES / NO

Refreshments   YES / NO

Other, please specify ....

9. In the last five years, have you obtained sponsorship for any of the following :

Author Visits	YES /NO		Cultural Events	YES / NO
Book Weeks	YES / NO		Reading Schemes	YES / NO
Summer Activities	YES / NO			

Other (eg. income from advertising), please specify :

....
....

10. In the past five years, have you received any major grants (eg. European Union, British Library funding) ?

YES / NO

If yes, please specify..
....

11. In the past five years, have you been involved in any joint ventures with private businesses (eg. publishing material from local studies collections, provision of a library building as part of a housing development) ?

YES / NO

If yes, please specify..
....

12. In the last year, have any of your staff received any specific training in marketing techniques or financial management in order to deal with changes to the Library Service ?

Yes, Both   ....

Yes, Marketing only   ......

Yes, Finance only   ....

NO   ....

PLEASE RETURN THIS FORM TO : SUSAN COPELAND, SENIOR LIBRARIAN,
THE ROBERT GORDON UNIVERSITY LIBRARY, ST.ANDREW STREET,
ABERDEEN AB1 1HG by Monday 11th March 1996.

THANK YOU FOR YOUR ASSISTANCE.

LIST OF SCOTTISH LOCAL AUTHORITIES PROVIDING LIBRARY SERVICES PRIOR TO APRIL 1996.

ABERDEEN
ANGUS
ARGYLL AND BUTE
BEARSDEN AND MILNGAVIE
BORDERS
CLACKMANNAN
CLYDEBANK
CLYDESDALE
CUMBERNAULD AND KILSYTH
CUMNOCK AND DOON VALLEY
CUNNINGHAME
DUMBARTON
DUMFRIES AND GALLOWAY
DUNDEE
DUNFERMLINE
EAST KILBRIDE
EAST LOTHIAN
EASTWOOD
EDINBURGH
FALKIRK
GLASGOW
HAMILTON
HIGHLAND
INVERCLYDE
KILMARNOCK AND LOUDON
KIRKCALDY
KYLE AND CARRICK
MIDLOTHIAN
MONKLANDS
MORAY
MOTHERWELL
NORTH EAST FIFE
NORTH EAST OF SCOTLAND
ORKNEY ISLANDS
PERTH AND KINROSS
RENFREW
SHETLAND ISLANDS
STIRLING
STRATHKELVIN
WEST LOTHIAN
WESTERN ISLES

LIST OF SCOTTISH LOCAL AUTHORITIES PROVIDING LIBRARY SERVICES SINCE APRIL 1996.

ABERDEEN
ABERDEENSHIRE
ANGUS
ARGYLL AND BUTE
CLACKMANNANSHIRE
DUMFRIES AND GALLOWAY
DUNDEE
EAST AYRSHIRE
EAST DUNBARTONSHIRE
EAST LOTHIAN
EAST RENFREWSHIRE
EDINBURGH
FALKIRK
FIFE
GLASGOW
HIGHLAND
INVERCLYDE
MIDLOTHIAN
MORAY
NORTH AYRSHIRE
NORTH LANARKSHIRE
ORKNEY
PERTH AND KINROSS
RENFREWSHIRE
SCOTTISH BORDERS
SHETLAND
SOUTH AYRSHIRE
SOUTH LANARKSHIRE
STIRLING
WEST DUNBARTONSHIRE
WEST LOTHIAN
WESTERN ISLES

NEW SERVICES : RESPONSES TO QUESTION A3

The responses to section A3 of the questionnaire are listed below, grouped according to local authority size. Quotes are shown in italics.

QUESTION A3.

Have you introduced any new services recently as a result of customer demand / known customer need (e.g. Sunday Opening, Services to Business) ?   YES / NO

If yes, please give examples.

How did you become aware of the need for these services ?

1. Responses from authorities serving a population over 200,000.

[Five (83%) of the authorities in this category replied 'YES'].

Not in the past year.

Greater use of computers to access information through use of CD-ROMs etc. - public asking for them and staff awareness.

Family history service - public demand.

Public word processing - public demand.

Resource unit for visually impaired - council policy.

Open learning units - partnership with FE colleges.

Audio Visual Service, Open Learning / Educational Services - defined as deficient by external consultant to Council.

CDs, development of talking books - letters, general awareness of audio market, staff feedback.

Libraries public access catalogue was made available in all libraries as a result of technology developments.

Open Learning (Language material) / Library Information for the Elderly service - see suggestions form.
[A copy of this authority's 'Comments and Suggestions' form was enclosed].

2. Responses from authorities serving a population of 100,000 - 200,000.

[12 (92 %) of the authorities in this category replied YES].

Public photocopiers; video lending - questionnaires.

Saturday afternoon opening and Tuesday evening opening at [-] Library - survey.

Cafe / CD ROM / Nintendo Games - surveys / suggestions.

Photocopying / fax at a branch library - word of mouth / user survey.

CD -ROM; Open Learning - customer requests and conversations.

Video lending; CD lending - survey.

Charge per item for audio borrowing (introducing in May 96) - customer comment.

Housebound service - a limited service to housebound readers had existed for many years, staffed by volunteers. It did not cover our entire geographic area and it was obvious there must be a need because of the demand in the existing area.

Audio in branch libraries - questionnaire.

We are gradually introducing CDs and have introduced PC based OPACS - feedback from staff at service points.

Supply of information bulletin to businesses - sent sample and asked for response.

Reintroduction of Saturday opening of libraries - customer demand - libraries closed on Saturdays in April 1976.

3. Responses from authorities serving a population of 50,000 - 100,000.

[12 (86%) of the authorities in this category replied YES].

Open learning - public use of p.c. - through other library services - local groups working with unemployed.

Increased opening hour (for trial period); audio and video services - customer, user and non-user surveys; customer contract feedback; general staff / customer contact.

Compact discs; Open Learning - user surveys.

Flexible Learning; art workshops - feedback on questionnaires; comments from public.

Open Learning (Due to start Sept.96) - consultation with local college and other local groups.

Mobile Library - customer suggestions and branch closure.

Open Learning - research / direct requests.

CDs, teenage music - customer feedback.

Fax service - other library authorities experience.

Open Learning Unit - questionnaire to users.

Increase in resources for purchase of audio visual material for 95/96 - persistently suggested by public via suggestion boxes. NB. This additional money (£10,000) has now been removed from budget 96/97 due to cutbacks.

Later evening openings; information videos; open for learning project - consultation with staff and user feedback.

4. Responses from authorities serving a population of under 50,000.

[4 (57%) of the authorities in this category replied YES].

Open Learning - through market research.

A/V Lending Service - 1991 User Survey.

Earlier Opening, Central Library - usage (Queues at door prior to opening).

Open Learning - Customer comments to staff.

CHARGING POLICIES : RESPONSES TO QUESTION C1

The reponses to section C1 of the questionnaire are listed below, grouped according to local authority size. Quotes are shown in italics.

QUESTION C1.

Please state your Library's policy on charging for services. (If a written statement of policy exists, please enclose a copy if permissible).

NB. None of the authorities provided policy statements in the form of written documents. Where respondents enclosed information relating to specific aspects of charging, e.g. price lists, a description is given below.

1. Responses from authorities serving a population over 200,000.

Current charges on attached sheet.
[The respondent enclosed papers which provide information on the charges for AV loans, overdue fines, microfilm/fiche photocopying, fax, sales of publications and promotional items, room hire, equipment use per hour, and sales of withdrawn stock.]

Free core service maintained, but charges levied for value added services.
[The respondent enclosed a very detailed price list which provides information relating to charges for overdues, reservations, replacement tickets, annual subscriptions and item charges for audio material, computer booking fees, photocopying, fax, accommodation hire, equipment hire, the hire of musical scores and playsets, reproduction fees for publications and greetings cards etc., location filming costs, research charges for business users, CD-ROM printouts, online searching, the patents document delivery service, provision of mailing labels, archives services, search fees and production fees relating to building control records, genealogical research by staff, and bindery services. Where prices differ for residents and non-residents, both amounts are stated.]

Very limited charging. 20p / audio music item. £2 initial registration charge for videos. Book sales. Fines. £8 for local history research of over 30 mins - very rarely used.

At present there is a policy of not charging - this may change if further budget cuts are imposed.

Currently under review. Not available at this time.

2. Responses from authorities serving a population of 100, 000 - 200,000.

All services to be provided free at service point.

Charge for as little as possible.

Items are provided free with some exceptions eg. video, hardware.

Core services not charged for but there are charges for audio-visual.

The Library Service charges fines, for requests, audio & video. All other core services are provided free.

Charges are made for services outwith core lending activities, eg. audio visual, photocopying, family history research, etc.

Keep fines low ; reduce administration time / hassle.

Charges should be made for services, such as reservations, which accrue actual cost to the library service.

Charges for photocopying ; videos (after 1.4.69) ; CD ROMs to lend (after 1.4.96).

No written policy.

3. Responses from authorities serving a population of 50,000 - 100, 000.

Charges are kept to a minimum - overdues were 10p per week, now 15p and recover postage for ILLs.

No services are charged, except requests - to cover postage and administration.

No fines - charge 30p for audio items. £1 per night???for video.

Charge for requests / reservations, for audio and video hire, for in depth research.

Charges made for overdue material, requests and audio.

No Library policy in place. District Council has usually dictated what services are to be charged for.

Requirement generally to increase income as a component of annual budget option.

4. Responses from authorities serving a population of under 50,000.

No charges.

Minimal charges - only fines for overdues.

Free if possible. Books free. A/V all subscription services.

Fees charges kept within reason avoiding handling charge.

Fines for overdues ; charges for audio & video ; photocopying & fax charges.

No charging for lending, reservations, AV, ILLs : only for overdue returns, photocopying, printouts, fax, etc.

GRANTS RECEIVED : RESPONSES TO QUESTION C10

The responses to section C10 of the questionnaire are listed below, grouped according to local authority size. Quotes are shown in italics.

Question C10.

In the past five years, have you received any major grants (e.g. European Union, British Library funding) ?

NB. The question included examples of the types of grants which could be cited, but no amounts were specified.

1. Responses from authorities serving a population over 200,000.

£7,000 received from British Patent Office (Laser disk training package, large screen PC, CD ROMs, display equipment).
£3,000 received from BLRDD (Janet / Viscount pilot project).

2 SLIC Grants for work on catalogue, and stock, of Gaelic Society of Inverness.
2 EU ESF Objective One grants to develop Open Learning.

SLIC - minor funding.

New library in Ferguslie Park (European funding).
SLIC grant for Open Learning Unit.

£12,000 from Langmuir Trust - to organise Langmuir collection.
£27,000 from Sports Foundation to renovated Exhibition Room.
Unilever sponsorship - £24,000 for Lipton Collection.
Unilever sponsorship - £20,000 annually for post of researcher.
SLIC grants for distance learning and currently video-conferencing.

2. Responses from authorities serving a population of 100,000 - 200,000.

European Union - project to investgate providing information to remote communities through the use of I.T. on mobile libraries.

Scottish Enterprise for Open Learning.

Open Learning terminal - Grant from SLIC.

ESF funding for retro conversion to computerised catalogue.

Open Learning - Scottish Enterprise.

SLIC Open Learning Grants. Urban Programme Funding for various projects eg. flexible access network.

Scottish Office Funding for Open learning.

3. Responses from authorities serving a population of 50,000 - 100,000.

Grant for microfilming local newspaper from the newspaper in question. (Details provided in response to question 9).
Grant from Scottish Enterprise for establishment of Open Learning Centre.
Grant from Scottish Enterprise to help set up Open Learning Unit.

SLIC grants (up to £4000).

EU - Refurbishment of local archives building.
Scottish Enterprise - Open Learning.

Scottish Enterprise & European Union.

Scottish Enterprise - funding for Open Learning.

Scottish Library & Information Council (for Open Learning).

ESF.

4. Responses from authorities serving a population of less than 50,000.

Open Learning.

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CHAPTER FIVE
EFFICIENT AND EFFECTIVE PUBLIC LIBRARIES :
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<http://www.earl.org.uk>

Project EARL: list of partners.
<http:// www.earl.org.uk/partners/index.html>

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UNESCO public library manifesto.
<http://www.unesco.org/webworld/libmanif/libraman.htm>

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e-mail from worcesterlibrary@clara.net to lis-pub-libs@mailbase.ac.uk on 21st October 1998 on the subject of 'Friends of the Library'.

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e-mail from PeterH@ntlib.demon.co.uk to lis-link@mailbase.ac.uk on 3rd June 1999 on the subject of 'Back catalogue Ltd'.