图书馆学家文库
Library of Library Scientists

李华伟文集

Collected Works of Hwa-Wei Lee

李华伟 著

下卷

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1. 图书馆建设与管理
Library Development and Management

国际图书馆界最近的重要发展[①]

Recent Important Developments in the Library World

国际图书馆事业的发展，主要是从“二次大战”后才慢慢发展，尤其在最近五六年中有重大的突破，造成此项突破的原因很多，一般说来，可归纳为以下四点：

1. 二次大战后世界各地出版物之量与种皆激增，图书馆界认识到以旧的方式来处理众多的资料，实嫌不足，必须借新的方法、新的方式、新的技术来处理，以谋改进。

2. 学术研究突破国家界限。

3. 国际机构的领导与影响；如联合国文教组织、国际文献联盟、国际档案联合会、国际图书馆协会联合会、国际科技团体联合会；等等，皆对图书馆事业的发展有很大贡献。

4. 其他诸如电脑、电信技术、复印、显微片等技术的快速发展，也促进了图书馆事业的发展。

“二次大战”后，国际图书馆的重大发展约可归纳如下：

一、世界科学资讯系统（UNISIST）建立与发展

UNISIST 的由来，开始于 1967 年。当时联合国文教组织与国际学术团体联合会认为有成立国际性科学资料系统的必要，于是组织了联合小组，研究如何成立的细节。至 1971 年，该小组乃提出可行性的研究报告。1971 年 9 月，联合国文教组织在巴黎召开了各国政府代表会议，决定由联合国文教组织下的一个有关科学的部门，负责推行世界科学资讯系统的活动，遂成立指导委员会，决定了数项目标（工作方针）：

1. 促进各国资讯系统间相互衔接的工具：欲使图书馆间能彼此交换资料，促进合作，首先应于目录系统中根据同一标准采取同一格式，此唯赖各工具以达相互衔接之目的（Tools for Systems Interconnection），故有 ISBN 等的发展。

2. 协助各国发展科学资讯系统——应帮助各国设立国内科学资料系统，联合国曾帮助若干国家设立科学资料中心，今后应加强这方面的工作。

3. 加强资讯专业人员的训练。

4. 鼓励各国政府迅速制定有利于科学发展的政策与法令，同时也要加强各国科资中心的联系。

5. 对于发展中国家应给予特别的援助：因发展中国家经费不足，进展较慢，故应予

① 本文由徐秀兰、张秀琴根据 1975 年 6 月 3 日在“中央图书馆”台湾分馆的演讲记录整理而成。

以特别援助。在东南亚国家方面，联合国文教组织做了几件值得注意的事情：

A. 自1973年起联合国文教组织派两名专家，在一年时间内，至泰、菲、新、印、越、寮、高[①]等国考察其图书馆及科资发展情形，提出改进的建议、期望，能加强图书馆资料中心的业务，并设立东南亚地区图书资料网。

B. 印度尼西亚因有一位国家资料中心的主管为UNISIST指导委员会委员之一，故于两三年来，得到联合国文教组织专家之协助，设立“全国图书资料系统”的发展计划，设立全国四大图书资料网，科学资料中心负责科学技术图书资料的业务，博物馆图书馆负责生物、农业、科学、医学方面的资料，另于“加卡拉”图书馆扩充改为社会、人文科学国家图书资料中心，并设专管农业、医学、物理的资料中心，此四中心，归于图书馆委员会指导之下，使业务能作协调，作有计划的发展，1974年开始，印度尼西亚并与南加州大学合作，由南加州大学于印度尼西亚选择若干图书馆做实验，此等图书馆可以免费利用南加州大学计算机贮藏的资料。

C. 联合国亦有意于泰国设立“东南亚地区的期刊统一目录”，以计算机作业，此工作正在进行，可望年底完成。

二、国际标准的厘订与推广：

1. 国际图书著录标准［ISBD（M）］。

此标准之来源，可追溯到1961年图书馆协会联盟在巴黎召开的“国际编目原则会议”通过一项极为重要的“原则说明”（Statement of Principles）希望能达到各国编目的一致化，其后乃有“英美编目规则”的出版。1969年召开“国际编目专家会议”决定了四点计划：

A. 各国应设立国家编目机构，负责该国出版图书的编目工作，不仅供国内图书馆之用，同时亦供给国外图书馆之用。

在著录上，各国应采取划一的格式。

C. 每一国家之编目机构，应设法将外国的图书编目资料供给国内图书馆。

D. 统一变电符号的使用：使计算机能自动识别著录的项目，1971年此标准公布后，即获各国的支持与采用，于1974年正式出版，望我图书馆界能迅速将之译为中文。

2. 国际期刊著录标准［ISBD（S）］。

此标准之目的、内容、要点、均与ISBD（M）相似，所不同的，是于版本著录上较为详尽。

3. 国际期刊资料系统指南（ISDS）。

1971年在“建立世界科学资讯系统可行性的研究报告”提出的同时，联合国文教组织与国际科学团体联合会的一个著录工作小组亦提出“建立一个国际刊物资料系统可行性的报告”获UNISIST的通过，成为其主要活动之一，1972年底在巴黎成立“刊物登录的国际中心”。总管刊物登录及编号事宜，根据该中心的指南（Guidelines for ISDS），世界各国或地区应分别设立各国或地区的ISDS中心，实际负责刊物登录及编号的工作，其编号为一种八位数字的号码，分成两组四位数字，中以一连字符号连接。各国家或地区的ISDS中心，先向巴黎的国际中心报备，取得各国或地区的已编过号的刊物名单，并由中心配给一批未用的号码作为编号之用。各国新设之中心，对此批号码应特别留意以免重复。

4. 国际图书标准号码（ISBN）。

① 寮——老挝；高——柬埔寨

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此标准以英国最先实行，此后乃由各国相继效仿，其编号为十位数的号码，每一号码包括四部分：

A. 国家或地区的识别号码。

B. 出版商号码。

C. 图书号码。

D. 核对数字。

这些号码伸缩性颇大，可灵活运用变化无穷。

三、全球目录的控制（Universal Bibliographic Control）

U. B. C 亦由国际图书馆协会联盟推动，在英国设立全世界推广中心，其活动用意有四：

1. 希望每一国家设立目录中心，负责全国出版图书之编目。

2. 著录格式应根据国际标准。

3. 著录内容应印行，使国内外能采用。

4. 成立全球性的联合目录。

四、专门性国际资讯系统的建立与发展

1. 国际原子能资讯系统（INIS）：由国际原子能总署发起，凡参加之国须成立中心，负责搜集全国有关原子能的书刊及报告，并作索引和摘要，将此等资料送交国际中心，以计算机作业，每月印出全球性原子能科学资料分送各国，此工作已进行若干年，颇具成效。

2. 世界粮农组织于 1972 年成立一筹备小组，欲成立世界农业资料系统（AGRIS），由世界粮农组织（FAO）负责，去年（1974 年）年初开始，东南亚方面，菲律宾大学农学院设立东南亚农业资料系统中心，于 1975 年 5 月开设讲习班，讲习有关事宜。

3. 发展资讯系统（DEVIS）：加拿大国际研究发展中心，为加拿大对外援助机构，对发展中国家给予经济援助，并欲成立全球性“发展资料系统”，此中心有四项工作，其中之一为协助发展中国家图书馆及资料中心的业务，并搜集其有关本国发展的资料，由各国自由参加，程序如原子能资讯系统。

五、全国性咨询系统的建立（National Information System）

NAIS 由联合国文教组织提出，有两大发展：

1. 发展世界科学资料系统。

2. 发展各国图书馆资讯系统。

1974 年 9 月，在巴黎召开“世界各国政府代表会议”，计划于 1978 年，召开会议检讨各国进展，再联合各国建立全球性的资讯系统，此一工作极为重要，若各国并无全国性资讯系统，欲谈国际合作，何异空中楼阁，故建立全国性资讯系统实为首要之务。

（原载《中华图书馆协会会报》1975 年第 27 期，第 34－36 页。）

科技信息中心的管理：国际发展研究中心（IDRC）与中国科技信息研究所（ISTIC）培训课程规划

Management of Scientific and Technical Information Centres: Aspects of Planning a Course Sponsored by the International Development Research Centre (IDRC) and the Institute of Scientific and Technical Information of China (ISTIC)[①]

I Introduction

The People's Republic of China recognized, in the late 1970's, that modernization of its library and information service would be a vital factor for national economic development. ISTIC, with responsibility for the delivery of scientific and technical information for all of China, also recognized that it had a basic need to upgrade its information course in the management of scientific information centres and to training for senior Chinese administrators. To this end, an agreement was concluded between IDRC and ISTIC early in 1980, and the development of the program itself began.

The overall objective for the course was defined by ISTIC: strengthening of China's capacity to provide improved information services by instructing senior personnel in practical management methods. Specifically, IDRC was asked to:

- provide participants with enough fundamental knowledge of modern information procedures to improve their work and to pass the experience on to others;
- increase the ability of participants to grasp the principles of scientific management;
- improve decision making;
- provide the basis for further training.

With the objectives established, it was left to ISTIC to determine the location or venue for the course and to choose the participants. IDRC assumed responsibility for selecting the lecturers, planning the curriculum and course content, developing support material, and identifying equipment that would be required for successful delivery of the program and which might not be available in China.

II Planning the course: IDRC/Canada

1. Selection of lecturers

It was felt that, ideally, the lecturers should speak Chinese, and efforts were made to meet this goal. However, with a roster of five identified as necessary for the delivery of the course as desired, only two people qualified to deliver lectures on information science in Chinese and who could be available for a trip to China sometime in 1982 were found. Dr. Hwa Wei Lee, Director of Ohio University Libraries, and Dr. T. C. Ting, Head of the Department of Computer Science at Worcester Polytechnic Institute, were both experienced lecturers in Chinese. They, with Kieran Broadbent, course director for IDRC who was also fluent in Chinese and team leader for the IDRC/ISTIC course, provided the Chinese component of the lecturing group. Supplementing them were Brian Wills, and Margaret Beckman, the Chief Librarian, University of Guelph, and it was hoped that the extensive experience of the latter in both lecturing and the management of scientific

① Co-authors: M. Beckman and Huang Jianyuan. Presented at the International Federation for Documentation (FID) Pre-Congress Workshop on *Curriculum Development in a Changing World*, The Hague, September 3 - 4, 1984.

information centres in libraries would compensate for their lack of fluency in Chinese.

One common characteristic was essential for this instructional group. With so many unknown factors, such as venue, level of understanding of the participants and availability of support equipment, flexibility in both approach and temperament was of supreme importance.

2. Curriculum planning

ISTIC had made an initial request for topics to be included in the course, and the curriculum followed this basic outline:

- Function, planning and management of information centres;
- Budgetary and fiscal control;
- Facility planning and administration;
- Improved bibliographic services;
- Systems analysis and design;
- Information technology;
- Planning for new technology;
- Sources of information;
- Personnel development and performance evaluation.

With these broad topics, the 12 day course (China works a six day week) was divided into time periods, and lecture headings identified. The lecturers met together in June 1981 and in February 1982, discussing various approaches, identifying individual strengths, refining the lectures' content and scheduling.

In addition to meeting the broad topic goals of the curriculum, an attempt was made to intersperse concrete or practical examples of different aspects of information technology with the more theoretical discussions. Audio-visual presentations—slide, tape, film—were considered important as was variety, and both of lecturers and method of lecturing.

Two other considerations shaped the final curriculum. The first was a request for a case study, based on a visit to a Chinese scientific information centre. The other was the need to allow time for formal opening and closing ceremonies and for course evaluation by the participants.

3. Lecture preparation

Each lecturer was asked to prepare his/her presentations, using the tentative curriculum and time schedule as a guide. These assignments were to be completed and, for the English lecturers at least, needed to be translated, three months in advance. This was a fairly heavy schedule, particularly for two lecturers, with more than ten lectures to be prepared. Illustrative material for individual presentations was also the responsibility of each lecturer. As a precautionary measure, a few auxiliary papers were also prepared as a contingency, in case the timing in the schedule had been under-estimated. Synopses or outlines of all lectures were routed by IDRC to ISTIC several months in advance of the course, to ensure ISTIC approval of the course directions.

A final overview, meeting on the course outline and content was held in Hong Kong, where the IDRC group assembled prior to flying on to Kunming (the site selected by ISTIC). Lectures were re-grouped into broad topics, with attention given to the work loads of individual lecturers. It was also agreed that we would meet daily as a group to adjust either schedules or lectures dependent on the experiences gained in the actual presentation.

4. Ancillary material and equipment

While the lecturers were busy writing their presentations and assembling slide sets, films or overheads, IDRC staff prepared as much background material as could be identified. A very valuable tool was a list of the acronyms which North American and European librarians or information scientists delight in using. MARC, ASCIB, L. C., AACR, and MINISIS were among the 300 terms translated into Chinese and provided to the participants. In addition, relevant reprints, bibliographies and notebooks were gathered, as were general audio-visual materials.

CISTI (Canada Institute for Scientific and Technical Information) was particularly helpful in providing resources which would be appreciated by its sister organization, ISTIC.

To guarantee delivery of the course, it was felt necessary to supply a variety of audio-visual and reprographic equipment. These were selected and sent to ISTIC in advance and donated to them at the end of the course. IDRC added two support members to the "China team", a secretary and a back-up lecturer with expertise in course preparations. Also, the IDRC secretary from the Singapore regional office, fluent in Chinese, joined the team in Hong Kong to provide essential liaison and logistical services.

III Kunming, December, 1982

1. Course location

ISTIC and IDRC had decided to hold the course away from the more populous areas of China and those most frequently visited by foreign visitors. Kunming, the capital of Yunnan Province, the most southerly and undeveloped part of China, was selected primarily for four reasons:

a) Since the course was to be held in December, a southerly location with a pleasant climate was thought desirable, particularly for North Americans not used to the lack of centralized heating.

b) A course held in Kunming would attract local attention and boost local morale and prestige, a result that would not be obtained in the larger centres such as Beijing or Shanghai.

c) Kunming had a reputation as a resort area, and a trip to this land of eternal spring was viewed as a reward for the participants and an unusual experience for the lecturers. Natural phenomena such as "the Stone Forest", a geological wonder, early Chinese temples, and large settlements of ethnic minorities provide elements of interest not experienced by most Chinese.

d) Beijing and Shanghai are the normal sites for scholarly conferences, particularly those involving foreigners. Exposure to the course and lecturers was considered a real opportunity for the information workers, librarians and documentatlists of Kunming: an opportunity that would not normally be available.

2. The participants

The IDRC China team learned about the course participants for the first time at the formal course ceremonies in Kunming on December 6. This was unfortunate since advance identification of the participants' backgrounds and course needs would have been useful in planning the curriculum. Since this information was not available, a general survey of the 65 participants was conducted to ascertain personal information, professional experience and individual needs. This established that most were senior managers of middle or mature years, frequently deputy directors of their respective institutions (e. g. provincial information centres). Most, also, were university graduates, and many had a fair to good understanding of English.

The participants indicated that the topics of greatest interest to them were:

- how to set priorities;
- how to plan and evaluate information services.

Although these interests did not exactly match the objectives for the course assigned to the IDRC team by ISTIC, the evaluation at the end of the course revealed that our original direction had been valid.

In addition to the official participants, each session was also attended by ISTIC staff members from Beijing or Kunming.

3. The Green Lake Hotel

The course was given in the Green Lake Hotel meeting room, a large pleasant space with lecturer's tables, screens, overhead projectors, and chairs for some 70 people. A logistical team of interpreters, secretaries and technicians had been supplied by ISTIC, and they, in addition to the IDRC group, were all housed in the same Green Lake Hotel, simplifying course logistics

immensely. Typing and copying course changes, setting up audio-visual support, arranging for bus tours, telex messages and a myriad of other details were expatiated competently by the ISTIC/IDRC support staffs, leaving the lecturers and participants free to concentrate on the teaching/learning experience.

4. Kunming course, Day 1, December 6, 1982

Most of the first morning was spent in an exchange of formal greetings from ISTIC personnel, from Beijing, and from the representative of the provincial governor. As well, an opportunity was afforded to the participants themselves to get acquainted and learn of each others' background and experience. (The eight women in the course soon became a close, identifiable group.) Dr. Lee gave a course overview and distributed the initial survey questionnaire, and the film, "Goodbye Gutenberg" was shown to give the participants an introduction to North American libraries and technology.

The first formal lecture of the course was given that afternoon, by one of the English speaking members of the IDRC team, and so the first exposure to sequential translation occurred. It took much more time than anticipated as each Chinese sentence seemed twice as long as the English one which proceeded it.

An opportunity was also provided that afternoon for the participants to tell a bit about themselves and gets to know each other. ISTIC also announced the various entertainments and tours which would be worked into our schedule: three trips into the country-side to visit the Chinese temples, a commune and the Stone Forest as well as two evenings of acrobatics and operetta. The ISTIC course organizers also requested that at least two evenings be reserved for small group discussions, allowing the participants to choose topics which were of particular interest to them.

By the end of that first day's sessions, it was obvious that a restructuring would have to take place and a new schedule would have to be prepared.

5. Course Restructuring

The IDRC team met as planned to assess the first day's experiences and to re-arrange the lectures to accommodate the group sessions, the entertainment, and the complications of the translated sessions. This was not as difficult as it might seem as it already was clear that some topics could be compressed or merged with others. A new schedule was developed which met everyone's needs.

Translations posed a more serious problem, and it was not until after another day's experience that a solution was found. During the second day with several lectures being given by Dr. Lee and Dr. Ting, it was apparent that a more informal style, speaking to prepared outlines projected on the screen from overhead transparencies, allowed the participants to become more involved with the lecture. They felt more at ease, interrupting the lecturer with questions and asking to have different points explained in more detail. The formal prepared English texts, read and then translated sentence by sentence, did not permit this informality or encourage this valuable exchange of ideas.

It was therefore agreed at the IDRC group meeting, after the second day's lectures that Mrs. Beckman and Mr. Wills would attempt to rework their lectures to encourage a more informal approach. Accordingly, outlines of each lecture were developed on transparencies, using multi-coloured markers to highlight different headings. During the lecture itself, the transparency in English was projected onto the screen. Although Mrs. Beckman, for example, followed the English text of her prepared lecture in order not to confuse Mr. Zhao, her ISTIC translator who had his Chinese version before himself, both Mrs. Beckman and Mr. Zhao could speak to the transparency on the screen. With this visual representation before them, the participants seemed more at ease with the ideas being discussed and soon learned to break in and question Mr. Zhao, who frequently wrote an interpretation of the outline on the blackboard. In addition, Dr. Lee or

Dr. Ting, who fortunately made themselves available during all the lectures, also offered assistance as concepts of North American management or information technology proved too difficult for Mr. Zhao to explain. The English fluency of several of the participants was also used to advantage.

With a few days' experience, this method of instruction became a smooth operation, taking little more time than a lecture entirely in Chinese. Mrs. Beckman learned to sense when an idea had not been understood; Mr. Zhao learned when to question her himself, particularly about topics which he realized would be of special interest or concern to the participants and hence require more detailed explanation. The discussions after each lecture became enthusiastic exchanges, with Dr. Lee, Dr. Ting, Mrs. Beckman, Mr. Zhao and the participants all arguing in a mixture of Chinese and English which did not impede either their understanding or value. Lecturing in this manner, in spite of the handicap of the translation, became quite pleasurable, and, although not as worthwhile as they might have been if totally in Chinese, the English lectures in this modified style nonetheless were viewed as highly successful.

IV Evaluation

So the course continued for the rest of the two weeks, with both lecturers and participants gaining confidence and understanding. The informal outings and banquets also provided opportunities to share ideas and to learn from exposure to different philosophies and experiences.

Two activities concluded the course and gave further insight into the needs of information centres and information science education in China.

1. The Case Study: Institute of Scientific and Technical Information, Yunnan Province (ISTIY)

The Commission of Science and Technology for Yunnan Province, of which ISTIY is a division, had recently moved to a new building especially designed for it. A tour of the facilities therefore was viewed as a unique opportunity to learn of the resources and services of a modern scientific information centre. The visit did prove very useful, although not necessarily as intended.

The tour was organized with the total group divided into five teams, each assigned responsibilities for specific investigation: collections, services, technology, physical facilities, and staffs. After a presentation about the institute, the groups circulated around the building, speaking with staff and viewing the facilities and services.

After time for each group to coordinate responses to their particular assignment in the afternoon, the participants presented their views of what they had seen in a panel discussion. It was soon apparent that ISTIY had been viewed from two totally different perspectives.

The building itself, for example, was considered by the participants to be spacious, with a flexible interior layout, effective use of daylight, a generally pleasing ambience, and good potential for the use of modern materials and methods. Some faults were identified: high noise level emanating from a nearby market, poor location of the central reference card bibliographic area, lack of directional signs, and scattering of related subject materials. But overall, ISTIY was categorized as a success.

This view was not shared by the North Americans. Aside from the location, close to universities and scientific or technical industries, the Institute had features which contravened all standard library design concepts. The structural column spacing, for example, at four metres was too small to allow an efficient placement of stack ranges so that aisles were unnecessarily wide and stack ranges were too short. Ceiling lighting had been located with no relation to the stack ranges so that some aisles would be in total darkness after the natural lighting had disappeared. The dispersal of like functions, fixed (and hence inflexible and inefficient) walls, badly placed core areas which interrupted information functions, inadequate signage, and poor sound control were all identified as serious problems. Lack of identity as an information centre, with its purpose clearly recognized and accessible to the entering user, was also deemed a serious fault of the new building.

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