Advances in Librarianship

Volume 33

Anne Woodsworth
Editor

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Anne Woodsworth

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Volume 33

ADVANCES IN LIBRARIANSHIP

Advances in Librarianship

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Preface

The first half of this volume is on the theme of library operations and management. The second half covers three different topics which point toward trends and implications for libraries, education, and the use of electronic texts by humanities researchers.

The first chapter is by Professor Jonathan Warwick in the Faculty of Business at London South Bank University, UK. He reviews the growth and decline of Operations Research (OR) in general and in academic libraries in particular. Since OR has been reevaluated and shifted its focus to modeling activities that involve problem structuring. It is argued that with this shift academic libraries should adopt the new OR paradigms in order to face the unprecedented changes and challenges they face. They need to manage both strategies and change and a new paradigm of library OR will enable this.

Flowing nicely from this is a chapter about managing intellectual capital in libraries, one of only a few such studies in the field. Petros A. Kostagiolas and Stefanos Asonitis are both with the Department of Archive and Library Science at Ionian University, in Corfu, Greece. A thorough literature review is followed by an analysis is undertaken that relates library management to intellectual capital. They provide extensive classification systems as well as economic valuation methods of intellectual capital. The chapter concludes with the effect of spatial factors and cooperation and competition upon intellectual capital utilization in libraries and information services.

Taking a more research-based approach to the library's intellectual capital, Associate Professor Maureen L. Mackenzie (Townsend School of Business at Dowling College, Oakdale, NY) and Library Director James P. Smith (St. Francis College, Brooklyn, NY) analyze the results of a survey of library directors to find out how they were prepared to assume roles as managers and directors. Their major findings were that half of the respondents indicated that their formal library and information science education had not prepared them for their roles. Half reported that they had taken advantages of other venues for developing leadership and management skills. Although the authors assert that there is a direct relationship between leadership skills and organization results, they stressed the need for further discussions by the field (both educators and practitioners) about both formal

LIS education programs and other professional development opportunities to "grow" the leaders and managers needed for libraries.

Fourth chapter provides one of only a handful of studies about Native American tribal libraries. Author Elisabeth Newbold took a handful of cases and analyzed their operations from the perspective of staffing, funding, technology, and administrative support over a year. With initial interviews in the spring of 2009, and follow up interviews a year later, she identified key factors for success: having a designated librarian; support from tribal governments; plans or a vision for the future; and last but not least, partnerships and connections with other libraries or organizations. In her conclusion she notes that these case studies can apply in any country with far flung and ethnically or culturally isolated libraries.

In Chapter five, Mary Carroll on the Faculty for Workforce Development at Victoria University in Melbourne Australia, provides historical analysis of the two streams of library education in Australia over 40 years. The two streams are (1) university-based degree programs, or higher education and (2) vocational education library technician programs. As she explains the nuances and tensions between the two it becomes clear that library technician educational preparation and its curricula are based on tasks done in the workplace and library technicians' places in a library's hierarchy. University degree programs on the other hand are based on theoretical and conceptual structures.

The last chapter is by Dr. Suzana Sukovic, a Research and Policy Officer at the University of Technology in Sydney, Australia and a Research Associate at the University of Sydney. She studied a part of the digital frontier that few have explored to date, namely the nature and extent of humanities scholars engagement with electronic texts. Her discoveries found a distinctive pattern of information seeking by humanities scholars which she dubbed *netchaining*. Not only did Sucovic identify how researchers in the humanities seek information but also how they organize it and store it in personal collections for subsequent use. Her seminal results will inform development of digital collections by individual scholars as well as etext collections in digital and traditional libraries. It will also help to shape information services and educational programs or training needs in environments where e-research is conducted.

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Anne Woodsworth
Editor

Contents

Contributors ix

Preface xi

Library Operations and Management

Library Operational Research: Time for a New Paradigm? 3

Jonathan Warwick

I. Introduction 3
II. The Origins of Operational Research 4
III. Early Application of Operational Research to Libraries 7
IV. The Decline of Library OR 11
V. The Future of Library OR: A New Paradigm? 18
VI. Conclusion 26
References 26

Managing Intellectual Capital in Libraries and Information Services 31

Petros A. Kostagiolas and Stefanos Asonitis

I. Introduction 31
II. Libraries within the New Economic Environment 33
III. Review and Analysis of Intellectual Capital in Libraries 35
IV. Issues for Managing Intellectual Capital in Libraries 42
V. Conclusion 46
References 47

How Does the Library Profession Grow Managers? It Doesn't—They Grow Themselves 51

Maureen L. Mackenzie and James P. Smith

I. Introduction 51
II. The Research Framework 56
III. The Current Research: Stage Three 58
IV. Discussion and Conclusion 67
References 70

Trends, Issues, and Lessons Learned

Emerging Trends in Native American Tribal Libraries 75

Elisabeth Newbold

I. Introduction 75
II. Purpose and Methodology 76
III. An Historical Look at Native Americans 77
IV. Success Factors in San Diego Tribal Libraries 94
V. Conclusion and Implications for Other Libraries 97
Acknowledgments 98
Appendix 99
Tribal Library Questionnaire—May 2009 99
References 100

Defining Difference: The "Noble and Less Noble" Traditions of Education and Training in Australia 105

Mary Carroll

I. Introduction 105
II. Emergence of Australian Educational Structures 108
III. The Current Context: Re-assessing the Concept of Difference 120
IV. Contemporary LIS Education 125
V. Conclusion 126
References 127

E-Texts in Research Projects in the Humanities 131

Suzana Sukovic

I. Introduction 131
II. Information and Communication Technology in the Humanities 133

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III. Methodology 137
IV. Interactions with E-Texts 140
V. E-Texts in the Research Process 168
VI. Challenges and Aids in the Electronic Environment 187
VII. Implications for Academic Libraries 196
References 198

Author Index 203

Subject Index 209

Library Operations and Management

Library Operational Research: Time for a New Paradigm?

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Abstract

This chapter describes the growth and decline of Library Operational Research (Library OR) since the first descriptions of such activity appeared in the 1960s. The changing nature of OR and of the academic library is discussed and a case is made for recognition of a new paradigm in Library OR. First explored are the origins of OR and its application to academic libraries, summarizing some of the critical assessments of Library OR from those active in the field, and exploring some of the literature that relates to the development of OR itself, the academic library as an entity, and the modeler/library–practitioner interaction. Each indicates that a new way of working in Library OR is required if it is to deliver the results that OR has delivered in other contexts. The growth and decline of Library OR has been very marked. The decline has coincided with a reevaluation of the nature and contribution of OR itself, particularly in relation to modeling activities. New modeling approaches have evolved involving problem structuring, and these new paradigms extend naturally to Library OR and would help ease a number of concerns raised against the use of traditional OR models. Practical implications of this chapter are that academic libraries are facing an era of unprecedented change and some of the issues to be addressed relate to identifying and managing strategy and managing change. The adoption of new paradigms could enliven the practice and contribution of Library OR.

I. Introduction

As we move into the second decade of the 21st century, higher education (HE) in the United Kingdom is facing a period of unprecedented change as restrictions on the public finances seem set to demand greater efficiencies from HE institutions. At the same time, the quality of provision must be maintained and because students are expected to be contributing more and more to the financial cost of their education, the "student experience" is becoming more central to our ideas of educational quality.

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The notion of the academic library is also going through a period of unprecedented change, not only because of the library's position as a fundamental part of any university but also because of the ongoing revolution in digital technology and the effects this has had on collections along with modes of learning activities adopted by students.

It might be thought that in such times Operational Research (OR) would become a central pillar of library management decision-making because OR has built a reputation as an analytical toolbox for optimizing the use of limited resources and has been highly successful when applied in a number of organizations and industries. However, the reality in the context of academic libraries (so-called Library OR) is somewhat different and although the emergence of Library OR saw a great deal of published work from the 1960s through to the 1980s, there has, since then, been a marked decline in such work so that Library OR now seems to feature quite rarely in the published literature.

This chapter explores some of the reasons behind this rise and fall and discusses how Library OR could be reconceptualized so as to realize some of the benefits to the academic library that OR has offered and continues to offer in other disciplines. We shall first consider the origins of OR and then explore some of the early work conducted in connection with academic libraries. Some criticisms of this early work are then offered as well as a description of the schism in OR that provoked the development of new OR paradigms. Finally, we conclude with a personal view as to how Library OR might offer, through these new paradigms, real value and support for those involved in the management of academic libraries.

II. The Origins of Operational Research

The UK OR Society defines OR as "the discipline of applying advanced analytical methods to help make better decisions." Furthermore, the society describes the problem context within which OR workers operate as "messy and complex, often entailing considerable uncertainty" and that their mode of working involves the use of "advanced quantitative methods, modelling, problem structuring, simulation and other analytical techniques to examine assumptions, facilitate an in-depth understanding and decide on practical action" (UK ORSOC, 2010). This definition encompasses the full range of activities that currently fall within the scope of OR and embraces problems that span the tactical, operational, and strategic dimensions of management and planning.

The original conceptualization of OR though was far more modest and with the discipline rooted in military projects undertaken just before, and during, World War II, the first use of the term Operational Research was in 1936 (Gass, 2002). The war itself provided an acid test for effectiveness of the mathematical methods being applied to military planning and there were some notable successes. For example, a key to the defensive successes of the Royal Air Force was the development of radar technology, and it has been estimated that while the advent of new technologies had improved the likelihood of enemy aircraft detection by a factor of 10, the work of OR workers, in developing the man-machine system, had further increased this by a factor of two (Kirby, 1999). Such operational successes certainly had a profound impact in establishing OR as an area of activity of importance, even though it was essentially conducted by civilian rather than military scientists. Other important areas of wartime application included the scheduling of aircraft maintenance and inspection and enhancing the effectiveness of aircraft attack strategies on enemy submarines (Beasley, n.d.).

In the immediate postwar years, restrictions on the availability of resources (manpower, time, and physical resources) meant that it became imperative that maximum benefit should be derived from these resources. The transition of OR from a military discipline to one that had applications to business and management within the United Kingdom was initially rather slow, with adoption of the modeling methods developed being primarily limited to two major industries—the coal industry and iron and steel. Kirby (1999) argues that the real golden age of OR began in the 1960s and was essentially the result of a "modernization" of British industry in which companies moved from being predominantly family owned and controlled to having US-style multidivisional structures importing science-based managerial approaches, again originating mainly from the United States. Serious UK government interest in OR only became apparent in the later 1960s with the election of a Labor government that was committed to further industrial modernization and economic planning.

Thus, interest in OR grew rapidly in both the public and the private sectors, and as organizations grew and international competition increased, OR practitioners could offer support to managers through new computer technologies and mathematical methods that offered a degree of detailed planning and control that earlier generations of managers could never have had.

With the UK OR Society (founded in 1953) providing a focus for the development and practice of OR, the education of new generations of OR specialists came to the fore in the mid-1960s with the creation of new universities and business and management schools. These were keen to embrace the new business approaches and methods already being offered by their

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