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A NATIONAL PLAN
FOR LIBRARY DEVELOPMENT

by

William V. Jackson

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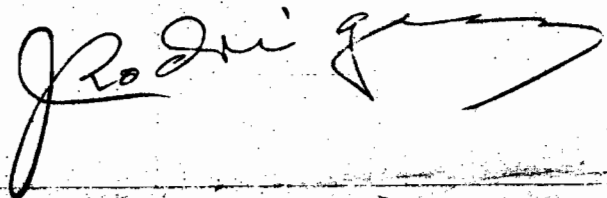
by

William V. Jackson*

Observers of the international library scene in the 1960's could not fail to note a growing discussion of and activity in the area of national planning for library and documentation services. This did not come as a great surprise in view of the intense interest which both international organizations and governments of newly developing countries had shown since World War II in long-range planning for socio-economic development, but perhaps its most notable repercussion within the library field occurred in what is now UNESCO's Division for the Development of Documentation, Libraries and Archives under the leadership of the recently retired Carlos Victor Penna, whose tireless efforts in this field culminated in his pioneering study, Planeamiento de Servicios Bibliotecarios (1968), of which a revised and enlarged second edition appeared in 1970 with the title The Planning of Library and Documentation Services (1).

It seems appropriate to this writer for a paper prepared for an International Library Conference taking place in Jamaica to consider the topic of library planning within the geographic framework of Latin America (used here to embrace the entire area in the western hemisphere to the south of the United States and Canada), with which Jamaican ties and links are surely increasing in number and importance. For this reason to the above title, one might add a subtitle like this: "Some Thoughts on, or, With Special Reference to, the Situation in Latin America." In short, this presentation draws not only upon the work of many persons concerned with library development in this area but also upon the writer's

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A NATIONAL PLAN FOR LIBRARY DEVELOPMENT

by

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Observers of the international library scene in the 1960's could not fail to note a growing discussion of and activity in the area of national planning for library and documentation services. This did not come as a great surprise to those of us whose interest which both international organizations and governments of newly developing countries had shown since World War II in bringing planning for socio-economic development, but perhaps it is not too much to say that the library field created a stir in the IFLA's Division for the Development of Documentation, at least in the years under review. (The recently published *Library Planning in Developing Countries* by this field culminated in his previous study, *Library Planning in Developing Countries* (1968), of which a revised and enlarged edition appeared in 1970 with the title *Library Planning in Developing Countries* (2).

It seems appropriate to the 1970's that the 1968 International Library Conference, held in Mexico City, should have as its topic of library planning which, though geographically the continent of Latin America (which were to embrace the entire continent of Latin America and the Caribbean of the United States - IFLA), which was for the first time, had a number of increasing in number and importance. For the first time, one might say, a topic like this, which had been previously, with Special Reference to the situation in Latin America, was presented, and not only upon the basis of a study of the state of library development in the area, but also upon the basis of a study of the state of library development in the area.

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own experience as observer of the Latin American library and bibliographical scene and, more recently, as one who has worked with national planning for book and library development in two large and important countries—Brazil and Colombia. The paper attempts to review briefly the background for and the elements which compose a national plan for library development and to present some comments and observations on them in the context of Latin America, with the hope that this "taking stock" can provide orientation to those unfamiliar with the general topic and useful suggestions to those working in planning as it becomes an increasingly important tool for achieving improved library and documentation services.

In almost every country in Latin America the decade of the 1960's saw the emergence of a new dimension in the library picture: a growing series of activities related to national planning for library development. Two years ago Marietta Daniels Shepard chronicled some of the projects undertaken in ten Latin American republics (3). As expected, her descriptive survey shows clearly that some countries have progressed relatively further than others; more interesting perhaps is the fact that, at least in this writer's opinion, a list ranking countries by total library development would not necessarily coincide with a list of those that had done most in library planning. Nevertheless, one must recognize that some of the same influences were and are at work within the entire area. Among these general antecedents the most important was the stimulus, beginning in 1961, which all types of socio-economic planning received from the Alliance for Progress. Another was the important role which the national planning authority—the Departamento Nacional de Planeación in Colombia, the Ministério do Planejamento e Coordenação Geral in Brazil, the Oficina Central de Coordinación y Planificación (CORDIPLAN) in Venezuela, and their counterparts in other republics—have come to occupy in government councils (in some cases overshadowing long-established ministries). The increasing awareness of leaders in higher education and in technology that progress in these sectors depends on an adequate information system and their concern for providing such a system has become more important as the growth of governmental revenues permits a larger number of educational and technological projects to be undertaken. Within librarianship one must note

the catalytic role of the Expanded Library Development Program of the Organization of American States, which now gives priority in its technical assistance and other efforts to national planning for library and documentation services and to training personnel (3). Similarly a series of regional meetings which focused in greater or lesser degree on planning and which brought together librarians and documentalists provided valuable opportunities for sharing information and ideas; while it is not possible to enumerate them all here, the following serve as examples: Seminar on Planning School Library Services, Bogotá, 1961 (4); Regional Seminar on University Library Development in Latin America, Mendoza, 1962 (5); Round Table on International Cooperation for Library and Information Services in Latin America, Washington, 1965 (6); Meeting of Experts on National Planning of Library Services in Latin America, Quito, 1966 (7); and Meeting of Experts on the Development of School Libraries in Central America, Antigua, 1968 (8).

All of these antecedents have contributed significantly to setting the stage for individual countries to become active in national planning for library and documentation services. Before considering the elements of a national plan for library development, it might be wise to remind ourselves of its relationship to the larger planning picture. The most commonly held view is that planning library services is one part of educational planning, which in turn is one of the major sectors of overall national planning for socio-economic development. In other words, if one views total national planning as the primary level, then the planning of major sectors like education or public health constitutes a secondary level, and planning components of those sectors—such as library and documentation services—forms a tertiary level. This helps to explain, perhaps, why some national development plans have had relatively little to say about librarians. Moreover, it is essential for us to recall that library planning—like all other types of planning—is not an end in itself, but rather a means for reaching pre-determined goals with greater speed and efficiency and less cost than would be possible without planning. But let us repeat: neither the planning process nor the plan itself are the goals; the objectives set forth in the plan are the results to be achieved. This is a key point, especially in

these days of "management strategy" and "handsman ship," which often lead managers and administrators to forget that their work is not the end in itself; the goal is to reach the stated aims and objectives of the institution; and consequently management and administration possess instrumental not fundamental values. This truth applies to development plans, including those prepared for library and documentation services.

Wanda has stated that the two phases of library planning are the normative and the operational, defining them as follows: "(a) definition of the general and specific purposes of establishing, operating, and extending library services, and of the various possible interrelations; and (b) strategy to ensure the efficient execution and organization of use of the available human and material resources (9)." It may prove helpful, however, to think of three sequential steps: pre-planning activity, preparation of the plan, and execution of the plan.

The Normative Phase

A national plan for library development must, by definition, consider all of the informational needs of a nation, whether of practical, cultural, or recreational order, the extent to which they are presently met (and consequently the deficiencies which exist), and the proposed methodology for reaching the goals established within a reasonable period of time. The complexity of this task calls for the planners to have at their disposal all previous experience—in other words, a complete supply of extant documentation. The failure to assemble such documentation can be one of the first shortcomings in a planning assignment. At first glance this appears to be an easy chore: consulting the bibliographical tools of the field (Library Literature et al.) and going to the library or library science and documentation to obtain the publications. The listed references often indicate no large amount of material—one learns later that bibliographies and indexes frequently reflect only published studies. The lack of extensive collections of library science

Latin America (with the two notable exceptions of the Instituto Bibliotecológico at the University of Buenos Aires and the Inter-American Library School at the University of Antioquia in Medellín) complicates the job of obtaining publications. As the planners continue their work,

they come to realize that there is, after all, a considerable body of information available (this holds true for most countries), but that an extremely high percentage has appeared in ephemeral form: working papers for conferences (which may or may not appear in final proceedings, if there are published proceedings), reports of expert missions, studies issued in processed form by ad hoc committees and groups, memoranda and other documents prepared for internal use, and correspondence between libraries and other organizations, both national and foreign. To assemble all of this information is not, one then realizes, a simple task. Its physical dispersion often means that the planners must obtain photocopies (in itself not easy, because the Xerox machine is not quite as ubiquitous in Latin America as in the United States). Despite the surprising quantity of documentation available, coverage of the various aspects of a country's library and documentation services remains uneven. This means that the planners must obtain information on those items which are either not covered or inadequately covered. The two chief ways of doing this are by questionnaire and by personal interview. This means, in the former case, that the planning effort must allow sufficient time for the preparation, reproduction, and distribution of forms and for their return, and this fact is bound to be influenced by the efficiency of mail service and the general attitudes of librarians and educators toward the questionnaire—a device much less commonly used in Latin America than in the U.S.A., although American social scientists seem to be making rapid strides in acquainting the populace of Latin America with the pleasures (?) of cooperating in this type of research. It seems that the shorter the questionnaire, the more rapidly information arrives, as the OAS team in Colombia discovered from the quick response to a one-page form sent to Colombian University libraries two years ago. The interview varies considerably in its effectiveness, especially in relation to the time it requires.

The experts in libraries and documentation services, whether nationals or consultants from other countries, will then need to study, to digest, and to evaluate all of the voluminous data in arriving at the diagnosis, at the analysis of the present nature, structure, and adequacy of the present library and documentation services in comparison with the needs

and objectives of the agencies and institutions providing them and with the technological needs for information. The nature and extent of bibliographical resources and services will be considered, as well as the adequacy of personnel, financial support, and quarters which make possible the libraries and information centers.

Until the present most work in the field of national planning of library services in Latin America has generally taken place at this diagnostic level and failed to develop a comprehensive national plan. In the light of the considerable problems faced by the profession, this is, however, a not inconsiderable achievement. Some of these descriptive analyses cover only certain types of libraries (10) (this has happened in Central America), while others have viewed the entire range of library and documentation services in such countries as Jamaica (11) and Colombia (12).

One important question arising in connection with this "library diagnosis" concerns standards. Realistic standards for libraries of various types (as developed in the United States and other countries which possess good library service) can provide a basis for determining services and goals for new ones. But the transfer of standards from other countries is a mistake; each nation must develop its own standards which relate to its existing library situation and its educational, cultural, and social situation and needs.

All of these activities compose the pre-planning phase and serve, in effect, as the prelude to the preparation of the plan itself. Before the detailed plan can be prepared, however, the goals must be determined, and this may call for both patience and restraint on the part of librarians and documentalists, because, as Penna has pointed out, the ultimate objectives (and even more, the time allotted for reaching them) will be determined not by librarians but "by higher political and administrative decisions and limited by the claims on national resources and priorities of other vital sectors as education, public health and communication" (13). Nevertheless, the planners must play an important consultative role, seeing that the goals are realistic ones. To attempt to provide all things to all people at once must be avoided; quite clearly in newly developing countries (like those in Latin America) to set up as a short range goal

the American, British, or Scandinavian level of resources and services which have resulted from decades of library support and development is to go forth on a mission doomed to failure from the start.

The Operational Phase

The operational phase of a national plan for library development consists of the elaboration of the plan itself (first as a draft plan, and then in final form) and its execution. The preparation of the plan consists of taking the objectives and spelling out the techniques, timing, and funding necessary to achieve them. This is probably best done by indicating the development proposed for the major types of libraries (national, public, school, university, and special). For each of them there will be a number of specific objectives pertaining to collections, services, staff, and quarters and equipment. Thus goals for university libraries, for instance, might include doubling holdings, hiring a specified number of library school graduates on the staff, and creating a unit for audio-visual resources. A national plan consequently might consist of a relatively high number of specific objectives; for each the planners must calculate the time necessary for attainment and indicate the progress to be made within this span—for instance, if a goal is to be reached in five years, the target on one hand might be for a 20% accomplishment each year, or on the other for a progressively increasing accomplishment—10% the first year, 15% the second, 20% the third, 25% the fourth, and the final 30% in the last year. The planners will also exercise care not to propose implementing all objectives at the outset, both to avoid spreading available funds too thin and to allow for more projects to be phased in as financing increases and as expertise grows. Thus the initial projects should be those making the greatest contribution to the "bibliographical and library infrastructure"—e.g., programs of training the manpower needed in later years. For each objective, not only must the timetable be prepared but the needed manpower (both in numbers and in level of skills) specified, and costs calculated (both on an annual basis and for the entire period required); in addition, the anticipated sources of funds should be shown, since some expenditures may be expected to come from external sources (14) and/or non-governmental

national organizations, although the national budget remains the chief source of funds. It may also be desirable to show a division of funds: a, b, capital expenditures; c, operating costs. The former will normally be high in the earlier phases of the plan, while the latter will increase as more and more programs reach their operating targets. In order to remedy in the foreseeable future the large "book gap" that exists in Latin America, it would probably be wise to consider the provision of adequate stocks of books and other library materials as a part of capital expenditures, just like the construction of buildings, and to place only the maintenance (and gradual strengthening) of these resources within operating budgets. Although a table may summarize the entire national plan, there will of course be a text providing appropriate explanation and discussion for each of the objectives.

The plan must also propose a structure for its administration and execution. Unless a national library board already exists, a library development office will presumably come into being and become the main authority on the execution of the plan. In general, that does not mean that it will become a large operating body, but rather that it will oversee and, especially, coordinate the contributions of already existing agencies to the accomplishment of the plan--each of them exercising one or more parts. Circumstances vary, however, and in countries where trained manpower is in short supply, it may be a wiser course of action to base a number of library and bibliographical services in a central library or agency. The library development office (or board) will need an advisory committee or council consisting not only of librarians and educators but also of economists, sociologists, and laymen who are "opinion leaders" to assist in its work and to provide backing and support.

We mentioned above the preparation of a national plan for library development initially in draft form. This is necessary so that the plan can receive the widest distribution and publicity possible before its final version becomes fixed. This serves the dual purpose of providing a channel for receiving constructive criticism and suggestions for improvements in both objectives and methodology and also means for

laying the foundation for the acceptance of the final version adopted. All too often the plan—or the studies and surveys leading to the diagnosis—fail to receive dissemination and discussion. In Colombia, for example, 1970 witnessed an important development: the gathering of much factual information on the country's library services; six separate studies (15) brought together a large quantity of information previously unavailable and presented numerous recommendations, but as long as a lag in distribution persists the significant expenditure in time and effort which their preparation represents will remain underutilized. In other words, publication, distribution and discussion are vital steps in preparing a plan; and here is a place where the library association can play an especially significant role by arranging for distribution and by sponsoring meetings at which proposed objectives and methodology can be openly and fully discussed. The definitive plan will incorporate some of the modifications and revisions resulting from such deliberations (and time must be allowed for this). Even after the final plan is set in motion, it does not remain permanently and immovably fixed; there will be subsequent changes and modifications, but here lies another pitfall: if they come too soon and too often, they may well raise questions on the wisdom of the original plan; if they come too late and at inequent intervals, they may fail to reflect shortcomings in time to prevent waste in effort, money, and manpower.

In considering a national plan we have not yet addressed ourselves to the question of the agency to be responsible for its preparation. There is no simple answer; it will vary from country to country and will depend on such factors as these: (1) manpower available, (2) interest of existing agencies, (3) relative priority of libraries and information-supplying agencies in educational development (and this indication may come from the national planning office). Some possibilities that come to mind are (1) the national planning office, (2) the national library, (3) the library association, (4) a library school, especially one already engaged in research activities, and (5) the ministry of education. Each of these agencies has various advantages and disadvantages; the key factors are of course the availability of competent personnel

manpower and an adequate budget for supporting staff, travel, supplies, publication of the plan, etc. Since there are some serious drawbacks to entrusting the task to any body which has other primary goals, it may be wise to create an ad hoc unit, a national commission for the planning and development of library services and documentation. Indeed, it may even be easier for it to obtain outside assistance in the form of financial grants or of expert assistance from philanthropic foundations and international agencies.

A Final Thought

In light of the very significant progress in librarianship in Latin America in the past several decades, one asks himself why few of these republics have made comparable strides in preparing a national plan for library development. There are, it seems to me, two contributing causes to this negative state of affairs: one has been the failure of librarians to convince both educators and those in charge of national planning of the role that libraries and documentation centers must play in meeting national information needs. All too often librarians have been talking to themselves, as it were, and the consequence has been the "re-invention of the wheel" as technocrats and government officials move in the direction of creating new institutions and putting their faith in new methods for meeting information needs. The other, and perhaps more serious fault, is the failure of librarians and documentalists to coordinate their efforts. In country after country each institution and each government agency, concerned with one or more book and library programs is not communicating with its counterparts. Within professional circles librarians and documentalists have spent time and energy warring over terminology or arguing over cataloging rules when they should have been cooperating to survey the state of library services and promoting the creation of a national plan which would use all of it. So let us conclude this brief look at and reflections on national planning for library development with a fervent plea to librarians and others concerned with improved library and information services to bring real meaning to the phrase "coordination of efforts."

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