	<p style="text-align: right;">3<sup>rd</sup> Corrected Version Date: 8/10/2007 Date : 08/10/2007</p> <p><b>Benchmarking, an Imperative for Special Libraries in the Caribbean: The Jamaican Case</b></p> <p><b>Pauline Nicholas</b> Electronic Reference Librarian and Immediate Past Chairperson of the Special Libraries Section of the Libraries and Information Association of Jamaica University of the West Indies Mona Campus, Kingston, Jamaica West Indies</p>
<p><b>Meeting:</b></p>	<p><b>152 Statistics and Evaluation</b></p>
<p><b>Simultaneous Interpretation:</b></p>	<p>No</p>
<p style="text-align: center;"><b>WORLD LIBRARY AND INFORMATION CONGRESS: 73RD IFLA GENERAL CONFERENCE AND COUNCIL</b> 19-23 August 2007, Durban, South Africa <a href="http://www.ifla.org/iv/ifla73/index.htm">http://www.ifla.org/iv/ifla73/index.htm</a></p>	

**ABSTRACT**

*As industries face the challenges of globalization, competition, and the advent of the Internet, emphasis has been placed on performance evaluation and reduction in overhead costs. As a result, libraries in the Caribbean face the challenges of a shrinking budget, downsizing and in some cases complete closure. Special Libraries, due to their unique nature, are forced to implement strategies that will prove their contribution to the bottom-line of the organization and at the same time allow holistic and strategic measurement and evaluation to take place. Libraries and librarians are required to demonstrate to top management that they are getting a good return on their investments in the library.*

**Benchmarking**, a total quality management tool rarely used in the Caribbean allows librarians to measure work processes or procedure in the library. It also guides in the provision of accurate and uniform information that can be used to convince the government or the funding agencies that the funds or budget allocation is being used effectively. It ensures that libraries and librarians will also remain on the cutting edge of the profession, improve their efficiency, effectiveness and competitiveness. Benchmarking calls for proper evaluation of library services which is also supported by Ranganathan’s Five Laws of Library Science. Client satisfaction, collections and usage and strategic alignment are three standard categories of measurement used in evaluating special libraries services.

This paper seeks to discuss the need for strategic measurement and evaluation in Special libraries in the Caribbean. It will provide an overview of a benchmarking pilot project that is being considered by a group of librarians in the Special Libraries Section of the Library and Information Association of Jamaica. It will also highlight how one Special Library in Jamaica has adopted three appropriate measurement and evaluation techniques to define its value in the organization and to keep its position in Jamaica as a focal point in the Socio-Economic Information Network (SECIN).

It is expected that the project will (1) facilitate the adoption and adaptation of best practices based on a process of benchmarking. (2) Library processes will also be improved and the services better tailored to meet the needs of the customers (library users, library staff and top management). (3) It will also help librarians to understand the importance and benefits of cooperation on a national basis.

### **Forces Shaping the Business Environment**

As industries face the challenges of globalization, competition, and the advent of the Internet, emphasis has been placed on performance evaluation. Inflation and economic slumps that have been affecting Caribbean countries have forced companies to seek ways to reduce over-head costs. Hence, departments that management presumes do not contribute to income generation are affected adversely.

The 21<sup>st</sup> century has seen a paradigm shift in the way business is conducted. There is a shift from product to service or as put by Maria Burke and Hazel Hall “product with service”. The use of information and communication technologies (ICT) in a global economy produces closer interaction between businesses, hence a more competitive working environment. These have forced companies to begin measuring performance and looking for ways to improve their operations.

### **Effect on Special Libraries**

As a result, special libraries in the Caribbean are often asked to cut budgets, redefine priority services and demonstrate value to the organization in order to survive. Propelled by the ideology that we are living in a web world and that everything is freely available at the click of a button, librarians are required to demonstrate to top management that they are getting a good return on their investment in the library. Burke and Hall note that information managers must “prove the worth of their services in providing information that can, for example, lead to better decision making. The information provided must be able to move projects from one stage to the next, facilitate improved relationships with clients, exploit new business opportunities, and save money and time”. (xiii). Knowing what drives an industry (the bottom-line) helps determine the information needs of the company (Burke and Hall 93).

However, the challenge faced by librarians is that of measuring their value so that management recognizes the impact of library services on the bottom-line. Special Libraries, with its small clientele and distinct readers with specific requirements, are forced to implement special strategies. The strategies implemented should allow holistic and strategic measurement and evaluation to take place.

### **Strategic Measurement and Evaluation in Special Libraries**

Danny P. Walker notes that librarians seem to be “busier than ever, but don’t have an effective way to assess the level of activities or to make them known to their constituents”. A management cliché used by John Brockman et al concretized the foregoing. He said “if you can’t measure it, you can’t manage it (xiv)”. This of course contains a large element of truth as it speaks to the need for measurement and evaluation in the management of library services and resources. Ranganthan’s Five Laws of Library Science also provides substantial reason for libraries to evaluate their services. The five laws are as follow

- Books are for use
- Every reader its book
- Every book its reader

- Save the time of the reader
- The library is a growing organism

Following is a brief examination of these five laws:-

The word 'book' is used in its generic form, however, within the wired information environment books refer to the resources and information in all its formats.

### **Books Are For Use (Resources are for use)**

This law addresses the issue of limiting the access of the resources through the various types and levels of censorship. Since resources are for use, librarians should not seek to limit access whether through closed stack, fees, passwords, etc.

### **Every Reader its Book (Every Reader his/her Resources)**

Implied in this law is the fundamental human rights of all users having access to resources regardless of age, ethnic group or religion. The collection in the library should be appropriate and adequate to fulfill the expectations of its users. This denotes the necessity to evaluate the needs of patrons and to design library services and select resources to meet those needs. The requirements and wants of the customers are paramount in order to retain and increase the market share. In evaluating, the librarian will ask a number of questions including the following:

- Which formats are best suitable in the delivery of that information?
- Which formats will be most useful for the users?

### **Every Book its Reader (Every Resource its User)**

This expresses the need for librarians to proactively deliver the available appropriate resource and services to the readers. It is important for the users to be provided with relevant high quality resources and that the library not cluttered with materials that no one wants. The challenge therefore is to identify those patrons who can make the best use of particular information resources and develop mechanism for their delivery in a manner that provides customer satisfaction.

### **Save the Time of the Reader**

The user's time is very precious. Customers, especially top managers, are not desirous of wasting time sifting through the vast amount of information in the cyber-world or in print in order to satisfy their information needs. The library system should allow the customers to find accurate information quickly. If users find what they want in a timely manner they will be satisfied and will want to return or tell others about the service. The library's responsiveness to customers' requests should be evaluated on a regular basis and modified accordingly. The law, save the time of the users, also addresses the use of the higher level information skills such as analysis and synthesis in order to repackage information for easy and quick access and this is of special interest to Special Librarians.

### **The Library is a Growing Organism**

The library is a system of life and so it should show signs of growth. If it ceases to grow it will die. Since the library is operating in a changing external environment, the practices adopted should reflect the changes in the society. Every librarian desires that his/her library grows and continues to provide better services and products, therefore, the policies, resources, services and procedures should be improved constantly in order to obtain these goals. If changes do not take place, the library will not function efficiently and therefore will not fulfill its mission. But, how does one determine if the library is growing? This can only be done through continuous, systematic measurement and evaluation (Danny Wallace 2) of staff, services and resources.

In admitting to the need for proper measurement and evaluation, Henczel recommended the use of the user-centered approach. She named client satisfaction, collection and usage, and strategic alignment as three standard categories of measurement for special libraries services (“Measuring and evaluating”). According to her, client satisfaction measurement, gathers data about how satisfied library users are with the services and resources. Susan Jurow and Susan Bernard (76) postulate that in order to measure client/customer satisfaction one must be able to determine the customers’ satisfaction and this assessment can best be done through the use of focus groups and surveys. When customers are satisfied, there is repeat usage by the same customers. There are also referrals and endorsements since one customer will tell others about it. Customer satisfaction also means that services are meeting or exceeding customers’ expectations and there is a service oriented environment that fosters courtesy, right attitude, helpfulness and respect.

In addition, Henczel argues that collection size and usage measurements are primarily quantitative and are mainly used to justify and make decision regarding budget etc. Joseph Mathews (15) confers that measurement relies on the collection and analysis of data, which are then compared to certain yardsticks. These yardsticks may include standards, goals, objectives or similar libraries. However, Henczel emphasizes that special libraries must not rely only on collection and usage data in measurement and evaluation as this does not reflect whether the users have access to the most appropriate resources, the consequent impacts on the efficiency of processes and the quality of the output (“Measuring and Evaluating”).

Strategic alignment is the process of linking innovation strategies with corporate vision, goals, objectives and strategy. Henczel states that “identifying the information that is critical to the tasks and activities that are carried out by employees and ensuring that it is provided in a way that complements existing workflows and information use practices”. In support, Jurow and Barnard (123) make the point that “when budget grows tighter, accountability takes on greater prominence .... This has led to more meaningful performance measures”. It must therefore be understood that for more meaningful measurement, all the above three categories of measurement and evaluation must be taken into consideration.

### **Total Quality Management and Benchmarking**

Implicit in the above is the call for **Total Quality Measurement (TQM)**. This is a term used mainly in the business environment but it has great implications for measurement and evaluation in libraries. An examination of the background of these terms is appropriate here. **Quality** as described by John Brockman et al (4) is the conformity to requirements provided the requirements are agreed with the customer. **Quality management** is a term that has evolved over a period of fifty years and it relates to how businesses respond to the current business and technological culture. During the industrial revolution period there was a reliance on final inspection to ensure quality of the finished product. Today, the emphasis is on cost-cutting, national and global competition, value for money and increase use of information technology to speed up supply chains and process complex data (14).

Brockman notes that government, funding agencies and service users are now demanding not only that quality be delivered but that it be demonstrated. Businesses now need to move beyond focusing on customers' satisfaction and focus on customers' delight so that customers will return again and again and become lifetime supporters.

There is a plethora of information on **TQM** as a strategy used for effective measurement in businesses and its principles can be applied wherever an organization must stay ahead of its customers. TQM is defined as "a system of continuous improvement employing participative management and centered on the needs of the customers" (Juwon and Bernard 3). Clearly, this is a time-consuming technique, nevertheless, Brockman (4) recommends that it should be seen as a good thing and it should be integrated into the strategic plan of every organization.

**Benchmarking**, by extension, is a TQM tool which also has its genesis in the corporate world. According to Juwon and Barnard (123), "benchmarking can be defined as a process for improving performance by constantly identifying, understanding and adapting best practices and processes followed inside and outside the company and implementing the results.

The main emphasis of benchmarking is the continuous improvement of a business operation. In implementing benchmarking one compares his/her organization or a part of it with that of other companies then identifies the useful practices and strategies that can be used to improve operations.

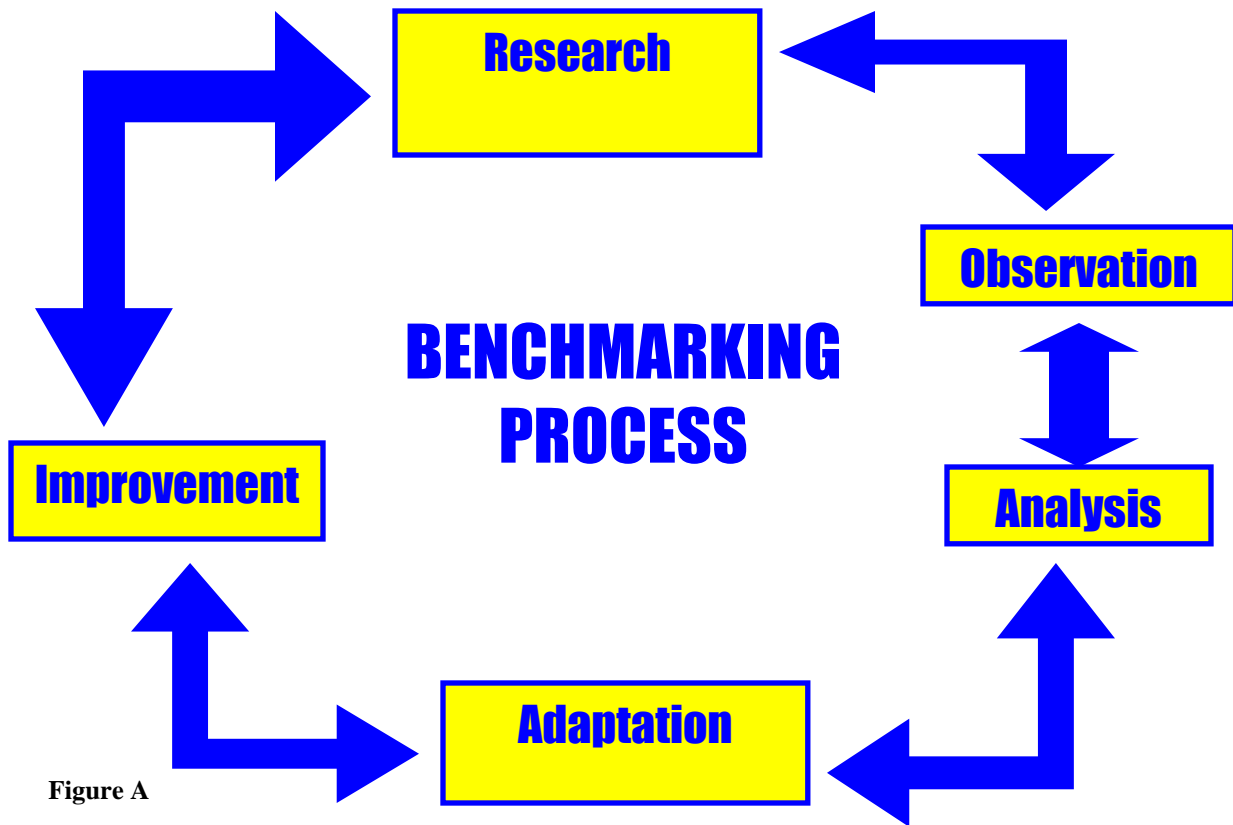


Figure A

Inherent in the strategy of benchmarking is the culture of a learning organization which Choo, Chun Wei describes as not restricting learning and exploration to its existing markets, products or practices, but being able to rediscover new goals and responses by stepping out of habitual frames of reference and re-examining norms and assumptions. Benchmarking can be considered a facilitator of learning since it focuses on interaction with other organizations. This interaction can be seen as a way of promoting openness, receptiveness to new ideas and continuous improvements.

### **Benchmarking and Libraries**

In applying the definitions and strategy to the Library and Information Services, benchmarking is a TQM tool used to measure and compare library's work processes with those in other libraries. The goal of benchmarking is to make the services and products of the library better meet the needs of the customers. This is done by comparing the processes of one library to that of other library/libraries and determining what is being done better. The best practices are identified and the procedures are adopted and adapted.

Benchmarking can be of two kinds. There is internal benchmarking where a library may choose to measure their performance in comparison to other parts of the organization. This type is often used to justify the existence of the library when faced with threats of downsizing. It can also be used to prove the contribution made by the library to the

organization's success. External benchmarking on the other hand, seeks to measure the processes or services in one library with that of another library. It has been noted that librarians in many developed countries have been benchmarking since the 1980s. They share statistical data and processes and services details with each other. The results have been phenomenal as the information gleaned is used to demonstrate to management that their performance is good or better than similar libraries and conversely that they require a higher level of support from the organization to perform as well as others (**Henczel**).

James Matarrazzo, and Toby Pearlstein (42) state that corporate librarians hold the key to determine new ways to work within their environments. Librarians must be the driving force behind the change process so that the corporate library can be seen as a solution centre and a prudent investment.

### **How Can Benchmarking Benefit Special Libraries**

It is evident that among other things, benchmarking will fulfill the following:-

1. Help to improve the performance of the library. Organizations will understand how to operate efficiently and effectively and will also provide a methodology for constant examination and review.
2. Increase customer satisfaction. Since the library is performing more efficiently and effectively the customers will be satisfied and will want to return and tell others about the services. There are three levels of customers that must be equally satisfied. These are the clientele, library staff and upper management.
3. Eliminate the inequitable distribution of resources. Librarians will also be able to identify the resources that are not being fully utilized and the areas where more resources are needed and implement strategies that will assist in more effective usage. This reduction in waste is of paramount importance to management.
4. Help to support the goals of the corporate organization and influence the bottom-line. In benchmarking, the organization's goals will be taken into consideration and the process streamlined to enhance that goal. In this age when companies are cutting cost, the library using benchmarking will be able to look at ways to help the company cut cost in a way that will not adversely affect the library. This is what management wants and will view the librarian as proactive and business-like.
5. Play an important role in the development of a learning culture in the organization. It encourages training and sharing of ideas and fosters teamwork.
6. Improve the staff's information literacy skills. Staff will learn how to identify information gaps, gather, analyze, and synthesize data. These are skills needed for the 21<sup>st</sup> century organization
7. Help to break down departmental barriers. Staff is required to work together in teams and with specialists in the various units and departments to meet the goals of the organization.
8. Improve or gain the support of management. As management sees that libraries are solving their own problems with good business skills they will give their support.



### **A Special Libraries Project in Jamaica**

There are evidences of the use of statistics and other strategies in the process of measurement and evaluation of library resources and services in special libraries Jamaica. However, there is the need for a holistic approach and the processes need to be systematic, and standardized.

The Special Libraries Section (SLS) is one of the four sections of the Library and Information Association of Jamaica. The others are school, public and retired members. It had its genesis in 1984 and the types of special libraries vary according to the nature and role of the parent organization. The libraries include those in government (public service), private sector and non-profit organization. The number of libraries has grown exponentially over the years and today, there are approximately one hundred special libraries in Jamaica. Like most special libraries globally, these libraries have fairly small specialized collection, with a staff of one or two librarians and they serve a small clientele with specialized needs.

Over the past five years, the changes taking place in the libraries have been quite noticeable. As changes occur in the business arena, simultaneous changes take place in the libraries. Libraries' budgets have been cut, often referred to as re-allocation of funds, and there have been rapid downsizing in some instances and even loss of physical space. At the same time there is the establishment of new libraries and re-establishment of old ones. These scenarios provide the background for this paper as it begs the questions why some libraries succeed and why others do not? What can be done to improve the library services in general? What can be done to ensure that these libraries remain on the cutting edge?

Very little about benchmarking is known and practiced among special librarians in Jamaica. Although, not a new concept, it is rarely spoken about or properly understood. Information is not shared readily and systematically and there is no standard for measurement and evaluation. A number of librarians do not measure and evaluate the libraries performance and those who do, implement ad hoc strategies/tools which may not necessarily reflect the true performance of the entity to management. Hence, it is believed that by sensitizing librarians to the need for strategic measurement and evaluation and the application of benchmarking, the libraries will be better able to justify their stay in the organization. Additionally, through partnership, collaboration and resource sharing the library will contribute to development. However, there is the need for further research into the issues relating to the value of special libraries and performance measurement and evaluation in Jamaica.

To this end, discussions were held with the Incoming Chairperson for the Special Libraries Section for 2007 and the Executive Committee to determine the strategies that can be put in place to assist libraries and librarians keep their stay in the companies despite the many downsizing and budget cuts. A group of librarians then decided to work on a pilot project to **save the special libraries in Jamaica.**

The goal of the project is to sensitize the librarians to the application of the TQM tool, benchmarking, and develop a culture of openness and collaboration among Special Librarians in Jamaica. The project will be accomplished through distinct but inter-related phases and it is estimated to last for a period of two years.

Phase - 1 Begins with a survey to ascertain management's perception of the value of the library to the organization.

Phase - 2 Involves the sensitization of special librarians to the impact of TQM – benchmarking. This will be done through a series of workshops and seminars. It is assumed that these will provide librarians with the basic skills and knowledge for benchmarking.

Phase – 3 This is the launching of the pilot benchmarking project – A library process that is considered critical to most/all government libraries will be selected and partners identified and benchmarked.

### **Expected Outcome from the project**

**Stages 1 and 2** - It is hoped that the survey will provide information that will guide the project in the selection of the partners and the processes to be benchmarked. Through the workshops and seminars, librarians will be sensitized to the importance of benchmarking and will be willing to cooperate, share information and implement the best practices in their organization. There will be a benchmarking ethos among librarians.

### **Stage3** –

Librarians will be able to do the following:-

- Review, analyze and use data for effective reporting
- Look for patterns and trends that can help improve services
- Track changes in the budget from year to the next. Look for money being spent on programmes that are either under-used or not used or programmes that seem to require a larger percentage of the budget.
- Evaluate search records both in print and electronic to identify the types of questions being asked and the sources used to answer then collect, evaluate and interpret data.
- Use the figures to compare companies and to compare periods and determine cause for shortfall/increase etc.

From as far back as 1963 Harold Sharp made a very profound statement which is still valid today. He said that “One of the greatest causes of waste in business world today is the failure to use accurate, up-to-date information” (11).

## **Measurement and Evaluation at the Library and Documentation of the Planning Institute Of Jamaica (PIOJ)**

### **Background on PIOJ**

The Planning Institute of Jamaica is an agency under the auspices of the Ministry of Finance. The agency initiates and coordinates the development, plans programmes and policies for the economic financial, social, cultural and physical development of Jamaica.

The library, therefore, collects stores and disseminates the information pertinent to the functions of the organization. With over 30 years of existence, it continues to grow exponentially, and receives quality support from management. Today, the Documentation Centre is a member of the Special Libraries Section and is the focal point of the Socio-Economic Information Network in Jamaica. The library is one of the few in Jamaica that is using the TQM concept. Boasting over three decades of existence, it provides services not only to its internal clientele but also to secondary and tertiary level students, consultants and other researchers and continues to be a vibrant entity.

### **How Does the Library Sustain its Existence?**

#### **Users' Satisfaction**

Among the external users of the unit are the repeat readers. Many of them are regular clients who have been using the library between two and five years. Users and lecturers have recommended friends, relatives and students to the PIOJ's Documentation Centre. When asked the secret of the sustainability of this special library, the Manager replied 'the contribution of the management and staff'.

The tenets of the PIOJ citizens charter stipulates the level of service which should be provided to clients. Clients have a complaint or suggestion form which they are encouraged to complete. The Director General examines each complaint himself. Additionally, the Public Sector Modernization Unit at the Office of the Prime Minister sends officers to visit public sector organizations incognito to sample the service which citizens receive. In addition to this, the Corporate Affairs Division conducts customer satisfaction surveys to measure client satisfaction. The library receives feedback on these measures and modifies its service as needs be. The library also conducts its own user surveys on an annual basis.

#### **Strategic Alignment**

The Directors and Director Generals are strong supporters of the library. Embedded in the PIOJ Act of 1984 is the stipulation that the organization should maintain a socio-economic reference library. The directors ensure that the library is provided with the needed resources and that it is properly managed. In addition, PIOJ is a prolific generator of information. For this reason, copies of all its documents, feasibility studies, reports, books, lectures, maps newsletters, DVDs, tapes, photographs, CDs, are available for consultation by users of the library. The centre's collection also boasts a wealth of information on a range of social and economic topics such as the economy, child welfare, tourism, sports, entertainment and the environment.

There is a culture of team work within the organization, as the institution does not depend solely on the efforts of the library's management and staff. It is also dependent on the support of top management and the willingness of technical staff to share their knowledge with the library users. Through team work and partnerships, the centre continues to provide information for persons who have contacted the organization whether by visiting the library, telephoning or accessing its website. Choo calls on librarians in the 'intelligent organization' to work closely with the other experts in the organization to prevent being left behind. In other words, there is the need for synergy

among the information expert, the information technology experts and the domain experts.

The library at PIOJ works with the other units to ensure that they are provided with the necessary information and human support for the success of the projects. The library ensures that the goals and objectives/strategic plan of the parent organization are reflected in the goals and objectives of the library. The activities planned are always embedded in the goals and objectives of the unit that will be the focus of the activities.

### **Collection and Usage**

Daily statistics on loans, appointments and subject areas of queries are taken. Librarians are also mindful of the non-print materials, hence, these are included and the hits counts in the databases are included in the report provided at the appropriate time. Figures are usually analyzed in order to determine shortfalls/overflows, strengths/weaknesses. The report submitted to management on a monthly basis constitutes both the quantitative and qualitative data gathered.

### **Performance Measurement and Evaluation**

The mission of the library is to provide excellent service so this remains a major goal. The PIOJ practices Performance Based Management so units, divisions and individuals must perform at acceptable standards to merit favourable ratings. The Ministry of Finance and Planning prepares an annual strategic plan each year. The PIOJ in turn, prepares its own plan based on the Ministry's. Each division and unit also prepares its own plan. The library's plan is prepared so that the library can contribute to helping the organization meet its strategic objectives.

### **Conclusion**

The vignette presented above conveys the common message that special libraries in the Caribbean and more specifically Jamaica must move away from being a cost centre to being a value-added centre. The libraries must also seek to offer services to satisfy the needs of its customers- management, its clientele and the library staff. Special librarians have always prided themselves in being 'special'. Hence, librarians must redefine their role by developing proactive strategies that will create new value in the organization or allow the organization to remain on the cutting edge. Through strategic alignment, cooperation and the librarians' immersion in the plans, goals and project of the organization it is possible for the Special Libraries in Jamaica to remain relevant and play important roles within the organizations of the 21<sup>st</sup> century. Clearly, benchmarking is a Total Quality Management Tool that will help libraries achieve the goals of the organization.

## Works Cited

- Barrett, Deanne. "Change and Competition Challenge Special Libraries." ALIA InCite. 2003: 06/02/2007 <<http://alia.org.au/publishing/incite/1998/04/change.html>>
- Brockman, John et al. Quality Management and Benchmarking in the Information Sector: Results from Recent Research. London: Bowker-Saur, 1997.
- Burke, Maria and Hazel Hall. Forward. Navigating Business Information Sources: A Practical Guide for Information Managers. London: Library Association, 1998.
- Choo, Chun Wei. "Information Management for the Intelligent Organization: Roles and Implications for the Information Professions." 04/06/07  
<<http://choo.fis.utoronto.ca/Fis/ResPub/DLC95.html>>
- Henczel, Susan. "Measuring and Evaluating the Library's Contribution to Organizational Success: Developing a Strategic Measurement Model." **Performance Measurement and Metrics**. 7:1 (2006): 7-10. Proquest. UWI Lib, Kingston, Jamaica. 2/1/2007 <<http://proquest.umi.com/pqdweb?index>>
- . "Benchmarking – Measuring and Comparing for Continuous Improvement." **Information Outlook** 6.7 (July 2002): 12-20. First Search. OCLC, Ohio. 5/1/2007 <<http://newfirstsearch.oclc.org/Web/ZFSQUERY>>
- Jurow, Susan and Susan Barnard. Integrating Total Quality Management in a Library Setting. New York: Haworth Press, 1993.
- Mathews, Joseph. The Bottom Line: Determining and Communicating the Value of the Special Library. Westport: Libraries Unlimited, 2002.
- Matarazzo, James and Toby Pearlstein. "Corporate Score: Marrying Two Expert Tools will Help You Sustain Your Corporate Library". **Library Journal.Com**. 132.2: 42-43. EBSCOhost. OCLC, Ohio. 5/1/2007  
<<http://web.ebscohost.com.oh0057.oplin.org/>>
- Sharp, Harold S. Readings in Special Librarianship. New York: Scarecrow, 1963.
- Wallace, Danny. Library Evaluation: A Casebook and Can-do Guide. Englewood, Colorado: Libraries Unlimited, 2001.