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Cooperative Development of Journals Collections in Health in Latin America and the Caribbean

Rosane Taruhn
C. Verônica M. Abdala

Abstract

The matter of the cooperation in societies and groups is introduced considering the process led in Latin America and the Caribbean by BIREME – The Latin American and Caribbean Center on Health Sciences Information, through its 37 years of existence, in order to place foreign and domestic technical-scientific information within the reach of the health professionals community in Latin America and the Caribbean countries with the mutual objective of contributing to the development of research, education and health care in this Region. Emphasis is placed on the development of journals collections in a cooperating way among libraries, presenting the different works and actions performed aiming at objectives such as the maintenance of the Collective Catalog SeCS, the adherence to policies and agreements, besides the development of other services like LILACS, SciELO and SCAD, presently represented in the Virtual Health Library – VHL. It describes the Portal of Journals in Health Sciences in the VHL, containing the SeCS Catalog and the links to the journals sites or to the complete articles texts, if available. Also, it describes the Programs which facilitate and support the journals electronic access for the countries in this Region. Concludes with some considerations about cooperation and challenges and includes two proposals: “Recommendation for a policy of cooperative development of journals collections in Latin America and the Caribbean” and “[Broadening of the] shared access to electronic scientific journals”.

1 Cooperation, society and group

“The question of cooperation has fascinated and perplexed philosophers, economists, psychologists, sociologists and biologists from Aristotle to Darwin. It continues to do so today. At the heart of the debate is the relationship between the individual and the group or society to which he or she belongs: why cooperate when we believe our individual interests would be better served by acting unilaterally?” This analysis presented in February 2004 by Sarah Gillinson, with experts’ contribution, brings “a key message filtered through every discipline: we are simply not as uncooperative as theorists objectively expect us to be. Why? [We have to] because we may be closely related, because our selfish genes dictate that we must cooperate within groups to survive and because we learn to reciprocate good behaviour”⁽¹⁾.

Among the several aspects presented by Gillinson, the called *norm theory* attracts our attention, explaining that we can cooperate to solve an externality problem and to establish a social efficiency. Externalities happen when the action of any person in a group affects our own quality of life, demanding initiatives to solve the problem brought about into a reality. So, “we cooperate when an externality is experienced similarly by a group and when there is a frequent contact among the sufferers”⁽¹⁾.

We consider that, by means of this theory, we may situate the cooperation process led by BIREME - The Latin American and Caribbean Center on Health Sciences Information, for uninterrupted 37 years of its history. The cooperative work is “the action accomplished to place foreign and domestic technical and scientific information within the reach of the health professionals’ community in Latin America and the Caribbean countries (the Region), with the mutual objective of contributing to the development of research, education and health care in the Region”⁽²⁾. In a similar way, the cooperative libraries experience this externality that they try to solve within their realities, keeping them in frequent contact and broadening the access to the information among their users’ communities.

2 Cooperation and libraries

According to Peter Senge⁽³⁾, the input is essential for any company in any line of business. It is a function of the planning to know how to translate the market trends and utilize the appropriate inputs in order to economically produce products or services to meet the consumers’ needs.

The information consumer, just like consumers in general, demands the product quality and reliability as well as an attentive services rendering.

In the libraries specialized in Health Sciences, as well as in other fields, many initiatives happen and works are accomplished to allow that the information needs of their users are met, despite the paradox: few financial resources versus huge informative resources.

So, the libraries define certain information groupings, “a highly selective subset of available, segregated and favored information objects, to which the access is allowed and to which the

client/user attention is paid in opposition to the excluded objects”⁽⁴⁾. This task is named collections development.

The American Research Library mentions that “at the beginning of this XXI Century, there is a fluid and uncertain environment of leadership and challenging opportunities for the library, especially concerning decisions of management and access to the collections”⁽⁵⁾.

The decisions at the level of collections development, about the ownership or access to information and on cooperative activities, may limit or widen the effective service to the users, as well as the services rendering cost-benefit ratio. These decisions should be reflected in the collections development policy established by the libraries.

In this context, the cooperation agreements between libraries have been the focus of attention, considering the fact that a library cannot aspire to have the whole information stored in its premises and that the uncontrolled collections growth is not allowed any more, and there should be a balance between the collections growth and their usage.

However, the co-operation between libraries is not a brand new subject. In 1879 the term “co-operation” emerges in librarianship, in the Campbell’s work, *Grouping of places for library purposes*. In 1886, Melvin Dewey publishes the article entitled *Co-operation*⁽⁶⁾. With the progress of the information technology and the expansion of Internet, the co-operation between libraries became evident mainly due the visibility facility and information exchange velocity for shared storage and/or preserving, the development of collective catalogs, the implementation of lending services and the cooperative acquisition.

3 About BIREME and the co-operative work

The BIREME – *Biblioteca Regional de Medicina (Regional Library on Medicine)*, currently The Latin American and Caribbean Center on Health Sciences Information – was founded in São Paulo, in 1967, by means of an agreement made by several institutions, among them the Pan American Health Organization - PAHO, the Brazilian Ministry of Health and the Escola Paulista de Medicina – EPM, Brazil. This agreement has been renewed each 5 years, reaffirming its mission of promoting and widening the access to information on health in Latin America and the Caribbean.

BIREME has appeared with the idea of creation of a Latin American bibliographic center dedicated to the area of health, as a result of deep discussions performed by international institutions and in a context of huge transformations of the conceptual understanding of Public Health in the sixties. In order to reinforce the need of creating this Center, the National Library of Medicine – NLM of United States presented information on the fulfillment of 130,000 articles requests from Latin American countries per year, representing 53% of the requests from outside United States. From these requests, 80% were concerned with an universe of 1,500 journals, among more than 5,000 journals existent in the Library⁽⁷⁾.

Thus, with the first agreement, the BIREME’s objectives and functions were defined, already considering the cooperative work: a) to allow the access to the MEDLARS databases

developed by NLM, and to a broad serials collection; b) to develop a relationship among co-operative libraries, including a training plan for librarians; c) to develop a document delivery system; and, finally, d) to increase the EPM journals collection.

This way BIREME has been participating in the process of cooperative development of journals collections in Latin America, at different stages of its performance and at different phases of its history. In 1969, the creation of a collective catalog of journals was defined as a BIREME's priority activity that was supplemented with material interchange and donation among many other libraries.

During the first three years of organization of this collective catalog there was a huge effort to gather and complete the collections of the main medical journals in the world, in the basic, clinic and medical specialties areas. The first program of interlibrary loan was accomplished with two libraries of USP – Universidade de São Paulo, Brazil, and with libraries of PAHO's specialized centers in Guatemala, Uruguay and Peru. At that time it was possible to fulfill 92% of the requests through BIREME and the cooperative libraries, although the reach of the service was limited to Brazilian users.

As from 1970, BIREME starts operating as a Sub-Centers Coordinator Center for the biomedical sciences area, progressing to the creation of national systems of health sciences information, to expand the reach of the co-operation activities to other countries in Latin America. The first steps were taken to achieve autonomy and services decentralization.

During the eighties, the most significant process was that of making the efforts to strengthen and formalize the national systems and to structure the services where they were not completely established yet. Concerning the co-operative development of collections, studies on the use of collections, both locally and through document delivery service, and a minimum 300-title collection was defined representing the most requested titles. These studies which represent the first BIREME'S effort to do a planned acquisition had an economic emphasis by analyzing the cost per use of each journal title and recommending the titles which should be available in the collections of each country⁽⁸⁾. At the same time, in order to expand the bibliographic control of the scientific literature produced in the countries of the Region, the development of the LILACS♦ database was started. In this context, in 1982, BIREME changed its name to Latin American and Caribbean Center on Health Sciences Information, when it started coordinating 279 libraries in 21 countries. The abbreviation BIREME has remained the same.

In 1989, BIREME presented a project, "Implementation of the Latin American and Caribbean Serials Catalog in Health Sciences" – SeCS⁽²⁾, led by the need of an effective management of

♦ LILACS data base - www.bireme.br/bvs/l/ibd.htm indexes the Latin American and Caribbean Health Sciences Literature covering regularly more than 500 health related journals as well as monographs, theses, proceedings and grey literature. In total, about 20,000 new records are added to LILACS every year. LILACS complements MEDLINE that indexed less than 50 journals from LAC. Using LILACS methodology, countries of the LAC maintains national indexes. There are also several thematic data bases, such as environment, adolescence, etc. The Virtual Health Libraries interfaces allow the retrieval of LILACS and MEDLINE jointly and provide links either to online full text or to online inter-library loan service to access photocopies.

serial publications collections in Latin America which, mainly for presenting a high cost of maintenance, demanded a common methodology of description to allow, by means of the development of local capacities, to meet the information needs of the health professionals community, at any level, at any place.

These initiatives were consolidated during the nineties, with the collective catalog SeCS, the document delivery service - SCAD[♦] and the LILACS, completely established and operated in a cooperative way, coordinated by BIREME, with access available from any part of Brazil or other countries. The growth of the on-line access from 1992 and the creation of the WWW, in 1994, both definitely transformed BIREME into an information network.

Other programs and projects happened later in the nineties, such as the SciELO Project – Scientific Electronic Library Online[•] and the Virtual Health Library - VHL.

The current model and strategy of BIREME and Latin American and Caribbean countries technical co-operation in the health information field is the Virtual Health Library (VHL) www.bvsalud.org. The VHL is based on the Internet information and communication paradigm that stress direct communication of users and networks of information sources. The decentralized operation of VHL information sources and services promotes the development of local capabilities, using advanced information technologies appropriate to social and economic conditions of Latin American and the Caribbean Region. All Latin American countries and most of the Caribbean Islands participate direct or indirectly in the operation of the network promoted by BIREME.

“The VHL content is a collection or information sources network in the Internet. Its architecture has the objective of assuring that the information sources produced in a decentralized way interconnect in a network to maximize its visibility and accessibility, avoiding duplication of works and favoring the co-operative work. Under the VHL architecture, an information source is any resource that responds to a demand for information by users, including information products and services, person or network of persons, softwares, etc. The architecture is currently organized in 6 types of information sources such as: including all indexes, databases, and directories whose records make reference to health-related primary sources, organizations, and events”⁽⁹⁾.

♦ Inter-library service for the access to printed scientific literature started by the end of the 60's through the sharing of paper based collections within a network of the main health science libraries from Latin American and the Caribbean. It has continually evolved and now it operates fully in the Internet through the Cooperative Access to Documents Service - SCAD - scad.bvs.br, involving about 500 libraries paper based collections which is integrated to the VHL database retrieval service, SeCS Health Sciences Collective Catalog and allows documents to be sent by traditional mail, fax and predominantly by Internet. About 1200 requests are processed online daily.

• SciELO – Scientific Electronic Library Online www.scielo.org operates a decentralized network coordinated by BIREME of national collections of open access journals.

4 Journals collections in VHL

Generally, the journals collections of the institutions have been receiving an increasing and special attention, mainly due to the relevance of the updated information, and should be object of a clear and accurate development policy, with priority given to the rational and shared use of the collections. In the Latin American countries, the libraries budget restrictions, added to the publications difficulties to survive, result in dismantled collections difficult to be handled in a standardized way.

In this context, BIREME and the cooperative libraries have maintained the collective serials catalog - SeCS, providing an easier access to the relevant information. Since the implementation of this catalog, in 1989, the basic principles of co-operation, participation and shared use of resources were highlighted with the following objectives:

1. to allow the localization and physical access to the primary documents of serial publications through network members;
2. to develop planned acquisition programs for collections reorganization and duplicates distribution;
3. to stimulate the interchange and the sharing of resources between libraries, by means of the switching system ⁽²⁾

Since then, this catalog has been performing a fundamental role in the regular operation of document delivery service in the Region, through the SCAD - Cooperative Service for Accessing Documents, allowing the shared use of the network cooperating libraries collections to meet more than 350,000 requests from users in the Region, according to indicators from the service during 2003 ⁽¹⁰⁾.

However, the objective of the planned acquisition development, collections reorganization and duplicates distribution has not been formally established yet, despite several actions accomplished among cooperative libraries such as duplicates interchange and the broadening of shared access to the journals.

4.1 The cooperative development of journals collections in the VHL

BIREME has stimulated the libraries of the cooperative network to formalize their procedures for collections development. In this sense, it has defined its internal policy ⁽¹¹⁾ of journals collections development that serves as a model for the libraries, respecting their individual characteristics, to develop their own policies naturally associated with a commitment to operate in a network.

This policy includes the following issues: the institution's mission and objectives; the mission of the journals collection; community served; collection composition; basic criteria for selection; way and availability of access to journals; budget resources; collection evaluation; donations; duplicates; exchange; disposal; and cooperation agreements.

Likewise, the collection evaluation studies are stimulated as an important tool for the decision making process concerning the collection maintenance and subscriptions renewal. The evaluation studies performed by BIREME have also served as a model for the libraries which should be applied according their specificities.

The key issues to be considered in the evaluation annually carried out by BIREME are: the journals usage and the number of articles supplied through the SCAD, the cost of the article in relation to the number of consultations and the price of the subscription; the maintenance of the collection by the cooperating libraries based on the area representative data; the impact factor and the availability of electronic access.

Since 2002 BIREME has been coordinating a discussion among the cooperating libraries aiming at establishing a formalized cooperation agreement ⁽¹²⁾ with the main guidelines in the medium term. In this agreement the network cooperating libraries commit themselves to make an effort to:

- provide access to at least one collection of each indexed journal title in international health-related databases, specifically Medline and LILACS, as well as of journals of VHL specialized thematic areas, expanding the universe of collections available for users;
- maintain an updated record in the Collective Catalog SeCS of the indexed titles collections in the LILACS database under its responsibility;
- rationalize journals subscriptions, avoiding efforts and resources duplication;
- give priority to the completion of collections registered in the Collective Catalog SeCS;
- maximize the publicizing of scientific journals in electronic format among its users.

BIREME keeps performing its role of promoting a cooperative work in the countries of the Region, but it cannot replace the national libraries networks responsibility of organization and leadership of the involved processes. This subject has been widely considered in the technical meetings of the Network libraries and, presently, the document “Recommendations for a policy of cooperative development of journals collections in Latin America and the Caribbean” is being discussed (Appendix I).

With this recommendation, BIREME seeks to stimulate the health-related leaderships in the Region, for them to organize themselves and pave the way for guidelines aiming at the users’ needs and interests, resources rationalization, access expansion, consortia configuration [♦] and the incentive to participate in programs of access to electronic journals.

4.2 Journals Portal at VHL

In the VHL, the Portal of Journals in Health Sciences is the result of the cooperative work in the development of journals collections. The Portal includes the Latin America Collective

[♦] BIREME is a member of the 1st. Latin America libraries consortium, the ProBE - Programa Biblioteca Eletrônica (Electronic Library Program).

Serials Catalog in Health Sciences - SeCS, presently containing more than 26 thousand collections of 71 libraries and achieving 5,924 titles of journals with at least one registered collection. The Portal includes the links to the journals sites or to the complete articles texts, if available, and indicates the journals included in the main programs, facilitating the access to the Latin American and Caribbean countries:

SciELO - Scientific Electronic Library Online operates a decentralized network coordinated by BIREME, of national collections of open access journals. SciELO is now publishing more than 200 journals from Latin America and Caribbean countries and Spain conforming one of the most important collection of open access journals which publishes around 8,000 articles per year. SciELO publishes also online reports and indicators on the usage and impact of the journals in order to complement the scientometrics indicators provided by the ISI Journal Citation Reports from the Institute of Scientific Information. www.scielo.org

Programa Periódicos CAPES (Periodicals Program) – a program of the Brazilian government that offers electronic access to articles of more than 7,400 international and national journals and to 73 databases in every areas of knowledge. It is available to teachers, researchers, students and personnel of 130 academic and research institutions in Brazil who have immediate access to the worldwide scientific production updated through this service offered by CAPES. www.periodicos.capes.gov.br

HINARI - Health InterNetwork Research Access to Research Initiative - is a WHO program, started in 2002, that offers to public institutions in developing countries free or almost free access to more than 1,500 biomedical journals and others in the area of social sciences, of the 6 of the main scientific publishers in the world. HINARI seeks the strengthening of the public health services, providing health professionals, researchers and those responsible for elaboration of public policies with access to high quality information in health through Internet. Presently more than 1,100 institutions in 101 countries are enrolled for accessing the journals collection, for free or at a low cost. www.healthinternetnetwork.org

PERI - Program for the Enhancement of Research Information - developed by INASP International Network for the Availability of Scientific Publications, with the financial support of several international agencies to support the production, the access and dissemination of information for developing countries researchers, using new information and communication technologies. www.inasp.info/index.html

6 FINAL CONSIDERATIONS

The information technologies will certainly modify, in a permanent way, the education, the work, the governmental actions and public services, the leisure, the culture and the ways of discussing and organizing the society. In a last analysis, it will modify the Man's own definition and understanding because it fundamentally involves the understanding of the time, space and the ways the knowledge is transmitted ⁽¹³⁾.

“Also in the universities, in the scientific communication environment, the boundaries of responsibilities inside libraries in the campuses and externally among the system financiers,

are changing or are confused”⁽⁵⁾. Under these circumstances, the libraries are affected by this new reality which context should be linked to the reality of their Institutions, of their countries and, consequently, of the world. Likewise, health-related libraries in Latin America are experiencing these changes.

The BIREME’s policy of use and development of a common and public domain methodology represents a huge challenge, but also means an opportunity to qualify the countries for operating information technologies strategically important for their progress. Among others, methodologies were developed for operation and maintenance of databases and other information sources (collective journals catalogs, directories, news) on-line services operation, management of on-line services for accessing documents and production of complete texts in electronic format. These methodologies and technologies developed by BIREME and its partners during the last three decades can freely accessed by every VHL cooperating institutions.

Today, all the Latin American and Caribbean countries direct or indirectly participate in the cooperative products and services promoted by VHL. It associates more than a thousand libraries and information centers in 37 countries, besides expanding the development of information sources through the convergence of producers, intermediaries and users for the production of information sources and access to documents.

The cooperation includes challenges to be overcome such as, for example, to deal with a perceptible absence of tangible benefits or ineffectiveness of the interests of the institution itself; to reallocate financial resources or, alternatively, seek to obtain foreign resources, since presently it is very difficult for libraries sustain themselves with their own institutions’ budgets; to balance the local users needs with those of other cooperating units; adequately promote the availability of shared resources for the clientele to be informed about the extent and depth of the information to be obtained; to develop the confidence in the accomplishment of the agreements by the cooperating libraries; to identify and develop appropriate mechanisms to monitor the programs effectiveness, collecting the necessary data at a justifiable cost; and, also to postpone the present gains for long term accomplishments⁽¹⁴⁾.

The cooperation demands a conscious effort and good will to provide the network with interdependences and responsibilities distributed among several levels, allowing the achievement of the access to information potential by means of resources sharing. On the other hand, it allows the expansion of the team knowledge improves the competence to develop the local collection and, especially, promotes the information exchange⁽¹⁴⁾.

In 1987, Abel Laerte Packer, presently BIREME’s director, quoting the former director, Fernando Rodriguez Alonso, emphasized that “the technology, although important, is not essential for constituting and operating a network; what is really essential is the cooperating attitude that should guide the actions of all the group, the replacement of the individualism by participation, of the competition by collaboration and of the selfishness by generosity”⁽¹⁵⁾.

For the VHL cooperating libraries, there is always the renewal of the challenge of stimulating the formulation of guidelines to facilitate the proposed programs, of publicizing the works

accomplished and of stimulating an unrestrained and broad cooperation with a mutual objective: to expand the access to information.

Appendix I

Recommendations for a Policy of Cooperative Development of Journals Collections in Latin America and the Caribbean

As a continuation of the conclusions and recommendations of the Working Group Shared Access to electronic journals (see Appendix II) during the 5th. Regional Conference on Health Sciences Information - CRICS 5, in La Habana, Cuba, and considering that:

- ❖ the equitable access to information in health sciences is fundamental for the improvement in the life conditions of the population in this Region
- ❖ the Internet and, particularly, the VHL Virtual Health Library, may potentially transform this goal into a reality

both national and international institutions are called on to support this initiative and contribute to:

1. the cooperative development of journals collections in the VHL
 - with the main focus on the users' needs of information
 - with the objective of reducing titles duplications and costs
 - with the purpose of increasing the number of titles with collection described in the Collective Catalog SeCS – Seriados em Ciências da Saúde (Serials Catalog in Health Sciences), available at the Journals Portal <http://portal-revistas.bvs.br>
2. the formalization of national initiatives in the operation of cooperative services such as inter-libraries lending and development of collective catalogs for shared access to collections, both in paper and electronic format.
3. the configuration of consortiums at national level aiming at electronic access to selected groups of international journals, searching for fair and accessible prices for developing countries, ways of financing and a commitment of the involved institutions promoting an expansion of the individual collections benefit.
4. the incentive to use programs of free access to journals.
5. the participation, dissemination and incentive to use the Programs for Accessing information in electronic Journals.
 - As the following, operating in 2003:
 - HINARI Program in the Region for eligible countries according to criteria
 - CAPES Periodicals Program (Programa Periódicos CAPES) in Brazil for the participating institutions

- GIFT Programs for WHO representations in the Region
6. the stimulus to the publication of electronic journals in the Region using the programs SciELO and/or PERI
 7. the formation of qualified users to search and use the services for accessing information in health.

Appendix II

5th. Regional Conference on Health Sciences Information

CRICS 5 Havana, Cuba

2nd. Regional Coordination Meeting of the Virtual Health Library – VHL

Group 7 Shared access to electronic scientific journals

Responsable: Verônica Abdala

Conclusiones y recomendaciones

Considerando que el acceso equitativo a la información en ciencias de la salud es fundamental para el mejoramiento de la salud y que Internet, y en particular la BVS, pueden potencialmente convertir en realidad esta meta,

Haremos un llamado a las instituciones nacionales e internacionales para que apoyen y contribuyan para:

- El desarrollo cooperativo de colecciones con el objetivo de racionalizar los recursos y ampliar el acceso a la información científico técnica;
- La conformación de consorcios en ámbito regional, nacional y/o temático para acceso electrónico a las revistas científicas internacionales, a precios justos y accesibles a los países en desarrollo, con el compromiso de las instituciones involucradas;
- Un esfuerzo conjunto para ofrecer a las instituciones de salud de la Región, el acceso electrónico de un grupo seleccionado de revistas científicas internacionales, las más importantes del área de ciencias de la salud, a ejemplo del Programa de Periódicos de la Fundación CAPES en Brasil;
- Que las unidades de información sean evaluadas por la capacidad de provisión de acceso a las fuentes de información y no solamente por las colecciones existentes;
- Las iniciativas de acceso libre a las revistas científicas;
- Las iniciativas nacionales y regionales de operación de servicios cooperativos, como préstamo inter bibliotecario y desarrollo de catálogos colectivos, para el de acceso compartido de colecciones en formato electrónico y en papel.

Haremos un llamado especial a la OMS, agencia internacional líder en salud, y a sus socios para que contribuyan a los esfuerzos nacionales e internacionales para:

- Trabajar con los gobiernos para que asuman un papel activo apoyando y proveyendo servicios de información en salud;

- Negociar con el sector privado, incluyendo los editores comerciales y proveedores de tecnologías de información y comunicación para que se comprometan a ofrecer precios transparentes, accesibles y justos, y a construir la infraestructura que permita alcanzar a las comunidades excluidas;
- Apoyar las iniciativas de acceso libre a la literatura científica.

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