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**USAID/El Salvador Library and
Information Services Analysis**

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Executive Summary

At the request of USAID/ES, a TDY was approved by PPC/CDIE to assess the mission's library development efforts and to make recommendations on how the mission might utilize both onsite information resources, and other Agency-wide information resources. The TDY team conducted interviews, performed site visits to several in-country libraries, reviewed documentation, and analyzed the mission library collection. The basic finding of the TDY team was that current efforts to develop a USAID/ES library are worthwhile, although the library's full benefit will not be realized without sustained commitment from the mission. The current space allotted to the library is adequate, although the layout should be modified somewhat so that the facility can be locked when no supervision can be provided. The temporary work being done to reorganize the current library collection will greatly improve the facility's usefulness to the mission. A major concern of the TDY team was how the library will fair in the future. Proposed staffing for the library was seen as particularly troublesome. The mission's plans for hiring an employee with only part time responsibility for the library will hinder proactive development of the facility. The TDY team also found that the mission can do more to benefit from other information resources available through USAID and from external sources. This report recommends ways that the mission can make better use of the Agency's institutional memory administered by CDIE (available through the Internet/intranet and on CD-ROM) and from other international development resources. An integrated approach to building a mission library and information center should be followed, one which utilizes both on-site resources, and those available within the Agency and elsewhere. USAID/ES has a unique opportunity to build a mission library and information center that can make real and fundamental contributions to the overall success of the mission in realizing its development objectives.

Forward

A Vision for USAID/El Salvador

Extracted from Competencies for Special Librarians of the 21st Century, October 1996. Prepared for the Special Libraries Association Board by the Special Committee on Competencies for Special Librarians. Joanne Marshall, Chair, Bill Fisher; Lynda Moulton; and Roberta Piccoli.

As we move towards the millennium, library and information professionals are facing at least three major paradigm shifts: 1) the transition from paper to electronic media as the dominant form of information storage and retrieval, and the convergence of previously separate media, such as text, graphics, and sound, into multimedia resources; 2) the increasing demand for accountability, including a focus on customers, performance measurement, benchmarking and continuous improvement, during an era when the financial resources available for providing library and information services are shrinking; 3) new forms of work organization such as end-user computing, work teams, management delayering, job sharing, telework, outsourcing, downsizing and re-engineering. These shifts are related to a combination of factors such as global competition, new computing and communications technologies, and the perceived need to measure the productivity of knowledge and service workers....

The Value of the Special Librarian

The special librarian adds value by providing efficient and effective information services for a defined group of customers. The special librarian may be a full-time member of an information management team in an organization or hired on a part-time or contract basis for special projects. The unique contributions of the special librarian include expertise in the content and selection of the best available print and electronic information resources as well as a commitment to putting knowledge to work or, in other words, linking the information user with the right information resource at the right time.

The special librarian understands the critical role that information plays for organizations and for individuals and takes a holistic view of information needs and uses and the contexts in which they occur. The special librarian identifies, retrieves, organizes, repackages and presents information in an actionable form so that the potential for goal attainment is maximized. The special librarian helps control the flood of available information by selecting what is relevant and usable and, when required, analyzing or synthesizing the content.

The special librarian is a technology application leader who works with other members of the information management team to design and evaluate systems for information access that meet user needs. Where required, the special librarian provides instruction and support so that end users can make optimal use of the information resources available to them. The special librarian is capable of working in the hybrid world of print and electronic media and providing the best mix of information resources in the most appropriate formats for the environment.

The special librarian plays a key role in developing information policy for the organization ensuring that access to all information resources -- from internal records to external databases -- is provided in the most strategically-effective and cost-effective manner. The special librarian also plays another important role in ensuring that contractual, legal and ethical obligations regarding information use are met. The electronic information age provides new opportunities for organizations to produce as well as use information products. Special librarians, given their familiarity with the information marketplace, can be key contributors to the development, marketing and use of information products.

Special librarians are knowledge-based practitioners who use research as a foundation for their own professional practice and who support the conduct of research through their professional associations such as SLA. Research has shown that the provision of appropriate information can lead to: better-informed decision-making; the ability to proceed to the next step in a project or task; improved relations with a client; and the exploitation of new business opportunities. The right information at the right time can also benefit the organization by saving the time of highly paid employees, avoiding poor business decisions, and even direct loss of funds (Marshall, 1993)

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1. Background

USAID/El Salvador (USAID/ES) requested technical assistance from PPC/CDIE to assess its library and make recommendations for future directions for its collection and information services. The mission has a wealth of materials documenting the path the program in El Salvador has taken over the past 15 years, including valuable historical information on land reform and the conflict. CDIE was asked to make recommendations regarding the disposition of the older pre-1987 material; to assess the information collection and services at USAID/El Salvador; and to assist the mission in developing a strategy to better organize its information resources and to make those resources more readily available to users.

1.1 Previous Library Development Efforts

The USAID/ES library has been in existence for several years, although it has been unstaffed since mission budget cutting in January of 1996 resulted in the loss of the librarian, Penne Scott. The library is currently located in open space on the third floor of the mission facility, however, the facility is not secure because it lacks a door that can be locked.

A previous one week consultancy was completed by Sharon Van Pelt in August 1996, whose tasks included: 1) assessing the library; 2) conducting a two day training session to teach staff how to catalog documents and retrieve data using MicroDIS software; and 3) developing a system and guidelines for quality control for the MicroDIS system.

On the basis of Sharon Van Pelt's recommendations and with support from the mission Strategic Development Office (SDO), a temporary 3 month appointment was initiated for Sharman Toronto to reorganize the library. This effort began in September of 1997. At the time of the TDY, Sharman had been working for approximately two months reorganizing the library. One recommendation was to reclassify the library collection according to the USAID classification scheme and USAID Thesaurus. In November 1997, at the time of this TDY, the collection was approximately one third reclassified from the old system to the USAID classification system.

1.2 CDIE's Role

PPC/Center for Development Information and Evaluation's (CDIE) mission statement includes fostering and improving the use of information on development experience and program performance by USAID to achieve development results. PPC/CDIE, working in partnership with the Agency and its operating units, has the responsibility for acquiring and disseminating USAID's development experience information to help the Agency learn from experience and more successfully pursue its sustainable development goals. It creates and maintains USAID's "institutional memory" of development experience documents; makes it available to the Agency and its development partners; and draws on this experience to provide responsive reference and research services that enable lessons learned to be reflected in policy formulation and program planning and implementation.

CDIE, as the office with primary responsibility for acquiring, disseminating, and facilitating access to the Agency's development experience resources, is committed to helping missions make better use of information resources found within the Agency, and those available externally. CDIE is attempting to improve the coordination of information sharing between USAID/Washington and the field. During this time of dwindling resources, there is an even greater need to more effectively utilize the Agency's information resources.

CDIE has over 130,000 reports, evaluations and other development experience resources in its database, the Development Experience System (DEXS), all of which can be ordered from the Development Experience Clearinghouse (DEC).¹ New technologies such as the Internet/corporate intranet and CD-ROM technology make mission access to this resource easier than ever before. CDIE's central repository of the Agency's development experience information can provide benefits to the mission by serving as a backstop for Agency produced materials, and by ensuring the continued availability of valuable historical information. USAID/ES can take advantage of this resource by relying on CDIE for older less demanded materials and for other information less relevant to the mission's program objectives.

CDIE's involvement with USAID/ES in developing a mission library and information center reflects this desire by CDIE to help foster increased information sharing to help the Agency achieve its sustainable development goals. CDIE is working with the Agency to capture documents in electronic form, whenever possible.

1.3 Scope of Work

In its scope of work for this TDY, PPC/CDIE proposed to review the documentation collection and information services at USAID/ES, to:

- assess the information collection and services at USAID/ES to assist the mission in developing a strategy to better organize its information resources and to make those resources readily available to its users;
- review the extant library collection and make recommendations for the ultimate disposition of the older materials (pre 1987) to CDIE and/or an in-country library;
- conduct briefings and provide training on the recently available CDIE Online HomePage which will enable the mission to determine which records are already integrated into the Agency's Development Experience System (DEXS);
- review and analyze appropriate reengineering documentation; and,
- prepare a report on TDY findings.

Other areas of interest to the CDIE TDY team included:

The DEXS database contains approximately 1500 documents dealing specifically with El Salvador. Information on how to order documents from the DEC is included as Attachment E.

- How electronic documents/records are being created and managed by the mission; and,
- How the mission is documenting its development assistance activities under the Agency's reengineered procedures, particularly evaluations.

This report includes a detailed presentation of the team's findings and recommendations on appropriate approaches to the organization, access and disposition of the library's information resources and the provision of information services to mission staff. The complete scope of work is included as Attachment H.

2. Analysis Methodology

The TDY team sought to gather information by conducting a review of relevant materials and through a series of staff interviews. Our review and inquiry was focused on how the library and information center can help mission staff more effectively achieve their program objectives and contribute to the development process in El Salvador.

2.1 Interviews

Interviews were conducted with selected individuals in the mission, USIS/ES, and in three local libraries (two university libraries and one non-governmental organization). The list of the 23 individuals interviewed is included as Attachment A.

2.1.1 USAID/El Salvador Staff Interviews

The main purpose in talking with mission staff was to get a better understanding of how they were getting the information they needed, what information resources they were utilizing, and how the mission library could contribute to meeting the information needs of that particular person or team. Through these interviews, we attempted to determine how the library was used in the past, and how the library and information center might be developed to best meet individual staff member's needs for information.

Interviews were conducted with seventeen individuals in seven different functional areas, including:

- Strategic Development Office (SDO)
- Strategic Objective 1: Expanded Access and Economic Opportunity
- Strategic Objective 2: More Accountable Government Institutions
- Strategic Objective 3: Sustainable Improvement in Health of Women and Children
- Executive Office, Communications & Records (C&R), Computer Services Division (CSD)

The interviews were intended to be representative of the mission's various operating units and included team leaders and professional staff in a variety of sectors. The interviews were loosely structured to allow the discussion with each individual to provide us with the most meaningful information.

2.1.2 Other Interviews and Site Visits

In addition to interviewing the USAID/ES staff, we visited other libraries in San Salvador to: 1) gain a better understanding of the broader context of information usage and availability within the country; 2) determine how Internet technology is being used; 3) determine what library software is generally being used in country to support library operations; and 4) determine what, if any, opportunities exist for information sharing and cooperation between USAID and other in-country information providers. It was our understanding that a significant proportion of the USAID/ES library's patrons come from outside the mission facility, including Salvadoran and international students, researchers, and staff working with other development groups in El Salvador.

The site visit to the **Fundacion Salvadorena para el Desarrollo Economico y Social (FUSADES)**, a non-governmental organization (NGO), was prompted by the recent FUSADES request for an updated version of MicroDIS, the library software package developed by CDIE. FUSADES has successfully used MicroDIS 2.2e for a number of years. The collection currently numbers approximately 21,000 volumes. During 1996, 12,000 visitors used the library, of which an estimated 65% were university students, 10% were private or public sector researchers, and 25% were FUSADES staff members. The three library staff members include a chief, reference librarian, and technical assistant. There is a small book budget. FUSADES has in the recent past been a recipient of duplicate library materials purged from USAID/ES library.

The library of the **University of Central America (UCA)** is located on the campus of a highly respected university in San Salvador. The library contains 141,000 items and supports the student population and other users through memberships. The library uses CDS/ISIS software which is also searchable through the Internet (<http://www.uca.edu.sv/>).

The library of the **National University of El Salvador** also uses CDS/ISIS library software to support its library operations. The Systems Manager is currently testing the Beta Version 1.0 of the windows version of CDS/ISIS.

2.1.2.1 USIS/El Salvador

During interviews with staff, we were informed that there had been previous discussions between USAID/ES and USIS/ES about coordinating their efforts to develop information resources, especially the web site, and possibly to co-locate resource collections. USIS has a new information center with a variety of current and newly purchased U.S. cultural materials. Their location in the USIS building, located on the U.S. compound in San Salvador, makes cooperation

and collaboration very convenient. While the focus of USAID and USIS are quite different, the USIS staff seemed enthusiastic about cooperating in building readily available reading resources and in web development. Our discussions were held with several USIS staff members and the USIS Public Affairs Officer.

2.2 Review of Materials

Prior to the TDY, the USAID/ES Results Review and Resource Request, FY 1999 (R4) was reviewed to gain a better understanding of the mission program objectives. At the request of USAID/ES, a comprehensive search of El Salvador documents currently included in the DEXS database was conducted, and comprehensive reports prepared and delivered upon arrival. These reports included documents, dating from the 1960's, listed in both the DOCUMENTS and INVENTORY databases.

Upon arrival at the mission, we also reviewed the report from the previous one week library consultancy by Sharon Van Pelt completed in August 1996.

3. Findings

3.1 The Library

The space occupied by the USAID/ES library is attractive and adequate for its current needs. As personal and office document collections are incorporated into the library, available space may be used up quickly. The greatest deterrents to the control of library materials is the lack of a lockable door and inadequate staffing (once Sharman Toronto's appointment is complete). Because of the lack of staffing and security, pocket libraries exist throughout the mission. There is little staff confidence in the library retaining control of valuable materials, consequently collections are retained by individuals and by SO teams.

While in country, the TDY team reviewed the proposed position description for the librarian. The position, as proposed, is shared with data entry tasks for the new mission Geographic Information System and the New Management System. If the librarian has only one-third time available for managing the library, the potential for being a vital team player in the gathering and promoting of information services for the mission will be compromised. Included as Attachment G is an executive summary of a report prepared by the Special Libraries Association which stresses the role a qualified special librarian can play in a knowledge-based organization in the information age.

The priorities for revitalizing the library are clear:

- **Financial commitment** - First and foremost, the mission must be prepared to make a long-term financial commitment to support the library.
- **Librarian** - A dedicated trained, knowledgeable fulltime (if possible) librarian should be

hired, an individual who can maintain control of the collection and be proactively involved in the work of the mission.

- **Secure Space** - The space must be secured and closed with a door that locks to ensure the materials will be available for all to use.
- **Networking and promotion of services** - Finally, with a financial commitment and a secure facility, a knowledgeable and experienced librarian can have significant impact on the use of the library through promotion of information services, networking with other libraries, and working closely with the program staff.

3.2 Library Collection

The library contains approximately 3,000 items, both historical and current. It includes primarily reports on USAID development assistance activities (both program and project) centered in El Salvador, Central America, and world-wide. The collection also includes reports produced by other donors. Materials are in both Spanish and English. There are no reference materials and very few books.

Upon examining the document collection and talking with mission staff, we identified several subject areas of particular interest to the mission: privatization, agrarian land reform, gender issues, Chile, and water. A "collection development policy" should be developed by the librarian and the SO teams so that future development of the collection will focus on those areas of particular interest to mission staff. The policy should be updated on a regular basis to reflect changing mission priorities. A modest book budget should be made available to buy current reference materials, including: geographic atlas, dictionaries, relevant regional and country specific materials which are not available for free distribution. A limited number of development related journals should also be obtained for routing and general information. We noted many reprints from the journal, World Development. Other journal titles which are of interest to the teams and the missions strategic plan should also be considered. Proposed weeding/collection development guidelines are included as Attachment B.

One important deficiency within the library collection is the absence of current documentation on the mission's activities. No copies of important recent mission documentation, such as the Strategic Plan, R4's and Results Packages, were found in the library. This lack of current mission documentation in the library can be attributed in part to the long absence of active oversight of the library, although at the present time, there appears to be no systematic mechanism for transferring a copy of mission documentation to the library as it is produced. For the library to stay current and to be of most benefit to the staff, the library should receive a copy of all important documentation being produced within the SO teams and throughout the mission. The placement of the library within the SDO office will facilitate this process.

In summary, the USAID/ES library should be a working collection of materials which are currently relevant to USAID/ES's strategic plan and to the work of the teams in fulfilling their strategic objectives. The collection should include economic and development assistance

material of country and regional significance. Also, materials of other donors, including statistics, and other indicator data as is relevant. An initial list of recommended core library resources is included as Attachment C. Many of these resources are also available as electronic documents through a variety of organizational websites. Others are more conveniently used in paper form.

Collection Weeding - Prior to arrival in El Salvador, a printout was prepared of all El Salvador-related documentation currently in CDIE's DEXS database. This list, containing over 1,300 citations, was given to Sharman Toronto to help her in determining the disposition of unwanted and older material. Any duplicate materials, or materials not retained as part of the mission collection, can be checked against the list to determine whether the documents should be sent to CDIE or not. Based on the weeding guidelines from Sharon Van Pelt's recommendations, a collection of materials had already been identified for being withdrawn from the collection (duplicates, older materials, and those concerned with other geographic areas). The documents were reviewed for possible submission to CDIE, and those of interest were boxed and readied for shipment to Washington.

Preserving Older Materials (pre -1987) - One of the specific areas of concern to the mission was the disposition of older pre-1987 materials. It is prudent for the mission to preserve older USAID produced and supported material for historical purposes. It is not, however, mandatory that the mission serve as the sole repository for older materials. CDIE can assist the mission in preserving this important USAID-supported historical material if it is submitted to CDIE Acquisitions. The mission collection of old Project Papers not related to El Salvador or Central America can safely be provided to CDIE. Any documents not already included in CDIE's DEXS database will be added. By searching the database, the documents can be identified and provided to the mission when requested.

Older pre-1987 materials which are not produced or supported by USAID should be donated to a local institution (university or NGO library) if no longer of use to the mission. Some other donor material, particularly the World Bank documents, should be donated judiciously. Many World Bank documents are considered "internal" publications, and are shared with the US Government as a courtesy. Such publications are best destroyed rather than donated. U.S. Government produced materials, especially if out of date, should also be destroyed.

One option for preserving older materials is to digitize the documents through image scanning. CDIE routinely image scans all documents received only in paper copy. Scanned images cannot be downloaded or manipulated in a word processing package, but they can be printed. Once the mission library is staffed and stable, it is recommended that a future dialogue be initiated with CDIE to capture and preserve those materials of mutual interest to the Agency. Images can be made available through near-line storage or transferred to CD-ROM.

3.3 Library Technology Issues

At the time of the TDY, the mission had approximately 180 workstations, consisting of 110 Pentium 90's and the rest 486 PC's (with 75 or 100 MHZ). The library is part of this technology infrastructure, and future plans for the library should be considered within the context of technology changes in the mission.

3.3.1 Library Software Options

The software generally being used in El Salvador appears to be CDS/ISIS which was developed by UNESCO and is available free of charge to qualifying country institutions. This package is currently being used by the National University of El Salvador, and the University of Central America libraries. A windows version 1.0 was recently released. At least one USAID mission library (USAID/Dakar) is using CDS/ISIS for its library database management software. The package does not provide integrated database management and circulation modules. We were told that CDS/ISIS is available free of charge from the El Salvador Ministry of Education. It is not clear that this applies to a U.S. government organization.

The USAID/ES is currently using MicroDIS software for document management. MicroDIS software was developed by CDIE in the 1980's, although CDIE no longer supports upgrades or enhancements for this product. The software, while still functional and easy to use, will not operate in a Windows environment nor as a web application. Sharman Toronto is actively using the software to catalogue and classify the library's collection.

We recommend that the library continue to catalogue the collection using MicroDIS at the present time. Once staffing is stable and reorganization of the library is completed, alternative software packages can be considered. The library database being developed in MicroDIS can be exported using ISO 2709 for exporting to CDS/ISIS or another package in the future. CDIE is compiling additional information on suitable software packages to assist USAID/ES and other mission libraries in considering options for a new software package. Attachment F provides a preliminary analysis of several possible commercial library software packages.

3.3.2 The Library and Internet Development

USAID/Washington is investing considerable effort into Internet/intranet technology as the primary means for accessing information resources. USAID/ES is marginally equipped to take advantage of that investment. An average of three Internet workstations per team are available for Internet access. One of those workstations is designated a "public" workstation which is available to all and used by few. An additional public workstation with Internet access is available in the library. The mission goal should be for every workstation to have Internet access once the problems of connectivity and bandwidth limitations can be resolved.

A joint Internet home page for the U.S. Embassy, USAID, and USIS in El Salvador is under

development on the web (www.usinfo.org.sv). The USAID mission component is being developed internally by EXO/CSD. In discussions with mission staff, including members of CSD, we recommended that eventually the library database should be included as a component of this website. With the transition to new library management software, it will be possible to have the library's database online and available at every individual's workstation. Online access to this resource will allow persons who are working on a computer with Internet access to search the library's collection from their desk.

USAID/ES is uniquely positioned to cooperate with its campus neighbors, USIS and the Embassy in the building of this Internet resource.

3.3.2.1 Library Workstation Enhancements

One task undertaken while onsite was to reconfigure the library computer workstation so that users would be able to make the most of Internet access to development resources. There is a wealth of development information available on the Internet and through USAID's corporate intranet. On the library user workstation, within the Netscape Navigator software, Bookmarks were set up which contain the URL's or addresses for various international development resources on the Internet, and those available through the Agency's corporate web system. These Bookmarks were grouped into categories such as U.S. government resources, resources available from other donors such as the World Bank, information available from USAID, information available from non-governmental organizations, and information specifically about or from El Salvador.

Another accomplishment was to enhance user access to library CD-ROM resources by installing a CD-ROM reader on the library's public computer workstation and the newest versions of CD-DIS (the DEXS database on CD-ROM) and the Directives Resource CD-ROM. Both of these programs on CD-ROM were also given to the Systems group for installation on the mission LAN. Installing programs such as these on the mission LAN allow staff to access them from their own desktops as well. Having a CD-ROM reader for use by library patrons will allow the library to take advantage of a significant number of information resources being distributed in CD-ROM format.

3.4 Staff Support for Development of a Mission Library

In general, there is a substantial level of staff support for the further development of a mission library and information center. Some staff members are particularly interested in a mission library, yet others are ambivalent about its benefit to them and the mission as a whole. The challenge will be to develop a library and information center that will be seen as an asset by staff in helping them to do their jobs better. The traditional idea of the library needs to be retooled and refurbished to include a knowledgeable librarian who is comfortable with the tools for information delivery in a web environment.

The general conclusion we have drawn from our interviews with various mission staff members is that past perceptions of the usefulness of the library affect the current staff enthusiasm for development of a library. Several staff members, who had used the library in the past, were discouraged by not being able to find information they were looking for. The library will need to reestablish its credibility by building staff confidence in the fact that the collection is current and relevant, and that materials can be located when needed. Once staff trust is reestablished, there will be less reluctance in giving material to the library. Staff members need to be reassured that if they submit important documentation to the library that the material will not be lost, or irretrievable due to ineffective document search mechanisms.

3.5 Records Management Training

The mission EXO/C&R office has offered to host Records Management Training for other mission C&R staff in the region. Several missions have already responded affirmatively to the invitation for training in the March/April 1998 time frame. In our discussions with Rita de Dale and Heather Armstrong, we learned that no response nor offer of support had yet been received from Washington. During the TDY, we took pictures of the excellent training facility available and provided copies to M/AS/IRD Records Management upon our return.

4. Recommendations

The following recommendations were shared with the mission at the time of the TDY. Only minor changes have been made.

4.1 Mission support for the library should not be terminated

It is in the best interest of the mission to continue supporting efforts to develop an effective library and information program.

4.2 Consideration should be given toward increasing mission support to the library

While mission resources are limited, an investment in developing a high quality library and information system can be an investment in improving the development results of the mission.

4.3 The new librarian position should be a full time position

Hiring a new librarian for the mission provides an opportunity to augment the current skills and competencies found within the mission with a proactive information specialist who can help the mission take advantage of new information technologies and resources that will enable staff to more effectively carry out their responsibilities. GIS data entry, and NMS data entry responsibilities for USAID/ES, USAID/Mexico, and USAID/Panama would not allow this new information specialist to help the mission realize the benefits of its new library and information system.

4.4 The library should be operated as a controlled facility

Access to the library should be permitted only when a librarian is present to provide assistance. To protect the mission's investment in developing a quality library, it will be important to monitor the collection. Set hours can be arranged to allow internal as well as external user access to the library. The actual library should be redesigned so that the facility can be locked when unattended.

4.5 The current temporary work being done to reorganize the library by Sharman Toronto should be extended for as long as is mutually convenient

Proper procedures are currently being followed to reorganize the library, and it will be beneficial for Mrs. Toronto to continue developing the library for as long as she is able.

4.6 The library should remain open to the public, although the primary customer base should remain mission staff

Given the lack of adequate information resources within El Salvador, the mission library can be a valuable resource to researchers, students, internal NGO's, and government. The library, while remaining open to the public, should focus its limited resources on serving mission staff. The library should remain in an accessible location within the mission facility so as to allow for easy access by mission staff.

4.7 The library should be given a start-up budget sufficient to allow for the purchase of basic reference materials

The library will need to purchase certain basic reference and research materials (e.g. statistical data collections in print and on CD-ROM). See Attachment C.

4.8 A copy of all current substantive documentation produced at the mission should be submitted to the library

A system should be set up throughout the mission whereby all new program documentation is submitted to the library. For the library to remain current on Agency activities in El Salvador, all program documentation needs to be added to the library collection as soon after it is published as possible.

4.9 Efforts should be made to consolidate all mission document collections into the library

While the temptation for SO teams to keep their own sectorally-focused collections is understandable, it is recommended that the library should be the central repository for mission information resources.

4.10 All staff work stations should eventually be equipped with Internet access

Desktop online access by all staff will allow access to valuable development information resources. Online access allows staff to take advantage of other Agency information resources (e.g. CDIE Online) as well as other development information from around the world.

4.11 The library should become an integral part of a newly developed mission web site

The library database can be accessible on this site so that users can search the library's resources from their desktop. Online access throughout the mission will facilitate greater staff usage of its library resources. A USAID/ES mission web site can be linked to the current El Salvador Embassy site, to the USAID internal and external web sites, and to CDIE Online.

4.12 The mission should consider developing an online information-access training program for mission staff

It will be important for the mission to provide training to staff in how to take advantage of these newly emerging information technologies. As stated earlier, we see this as a function of the new librarian position.

4.13 The new librarian should act as the Mission Acquisitions Liaison for submitting documentation to PPC/CDIE/DI

The Agency's DEXS database administered by CDIE can be a valuable resource to augment those resources available at the mission library. The new librarian position should be responsible for making sure all newly produced documentation is submitted to CDIE. This position can act as an important liaison between the mission's library and information program and that of CDIE and its Agency-wide information program. Efforts should be made to set up a mission-wide protocol in which new publications to be delivered to CDIE are transferred to the new librarian.

It is important to understand that any documents submitted to the DEXS become part of a permanent repository. Those documents submitted are image scanned and can always be reproduced on demand in the future.

4.14 The mission library should attempt to network with other information centers in the region

The new librarian should continue with efforts to build a cooperative network with other U.S. government agencies (e.g. USIS), other universities, NGO's, Salvadoran government agencies, and other information centers within the country.

4.15 The library should continue to use MicroDIS until the library situation is stable

As discussed earlier, MicroDIS data is portable to another software package when the Mission is ready to make that step.

5. Next Steps - Continuing the Partnership

As stated earlier, CDIE is committed to helping the missions make better use of the Agency's development experience resources. While CDIE's ability to provide direct financial support to the missions is limited, it is prepared to assist missions in any other way it can. CDIE administers the Agency's DEXS database, which can be a valuable resource in the field. This database is searchable through CDIE Online on the Agency's corporate intranet system, through the Internet (www.dec.org), and is available through an annually produced CD-ROM. CDIE is prepared to assist USAID/ES staff in accessing this resource. Several specific areas which may be opportunities for further collaboration between CDIE and USAID/ES are listed below:

5.1 Provide database downloads and copies of current El Salvador documents in fulltext electronically or in imaged format on a CD-ROM with a searchable database.

The DEXS database contains numerous documents on subjects of interest to the mission such as land reform, water, and gender issues. The database contains over 1500 documents dealing specifically with El Salvador. This collection of documents dealing with El Salvador contains historical documents, dating back to 1960, as well as current documentation (see table below for breakdown of DEXS holdings by year).

El Salvador Documents by Date Range		
1990 to date	678	44%
1980-1989	599	39%
1970-1979	231	15%
1960-1969	37	2%
Total	1566	100%

It is possible to produce a CD-ROM with either images or the document in electronic format (e.g. WordPerfect etc.) of all the documents in the DEXS dealing with El Salvador. A search interface can be designed to allow users to search by title, author, subject, etc., and then either print or view the document on screen. This CD-ROM could be installed on the mission's already existing LAN so that staff can access this resource from their computer.

5.2 Download records and provide copies of USAID 'core' documents for El Salvador

CDIE could provide copies of important Agency-wide core documents to the mission library, including the yearly Congressional Presentation, Annual Performance Report, and other Agency-wide documents. Efforts would be made to provide these documents in electronic format on a CD-ROM or some other medium.

5.3 Create link from a USAID/ES HomePage to CDIE Online on the corporate Internet and the DEXS database on the Internet

Once a USAID/ES HomePage is developed, a link can be made to CDIE's resources now available online. This link can be made in the library and information resources section of the newly developed mission HomePage. If an external site is developed, a link can be made to the DEC and searches can be made of the DEXS database as well (www.dec.org).

5.4 Provide Training to the Mission Librarian

CDIE can provide training for the new mission librarian, if the mission can provide travel funds. Previously, mission librarians have come to CDIE during CDIE's Summer Seminar and taken the opportunity to learn more about services which are available to support their work. Finally, CDIE can provide guidance on the implementation of any new library software.

5.5 Prepare a collection of documents relevant for the mission library

CDIE can compile a group of documents consisting of CDIE evaluations and other studies which might be of benefit to mission staff. Also, the mission library will be added to the distribution list for future document dissemination efforts undertaken by CDIE.

ATTACHMENT A

INDIVIDUALS INTERVIEWED

Mission Staff Interviewed

Monday, November 4

- 1.) Sharman Toronto, Temporary Library Contractor
- 2.) Peter Kranstover, SDO Office
- 3.) Charles North, SDO Office
- 4.) Félix Quevedo, EXO/CSD (FSN)

Tuesday, November 4

1. Deborah Kennedy, SO2
2. Gary Robbins, SO2
3. Tully Cornick, SO1 (SSO)
- 4.) Rita de Dale, EXO/C&R

Thursday, November 6

- 1.) Julio Segovia, SDO Office (FSN)
- 2.) Ana Cristina Mejía, SDO Office (FSN)
- 3.) Mary Ott, SO1
- 4.) Stephen Grant, SO1
- 5.) Terrence Tiffany, SO3
- 6.) Dora de Gutiérrez, SO1 (FSN)

Friday, November 7

- 1.) Heather Armstrong, EXO Office
- 2.) Rey Cruz, EXO/CSD
- 3.) Debriefing with Peter Kranstover, Charlie North, Sharman Toronto, and Ana Cristina Mejía

Non-Mission Interviews

Wednesday, November 5

- 1.) Mario Torres, Library Director for FUSADES located in San Salvador
- 2.) Catarine Miller, Library Director for UCA located in San Salvador
- 3.) Carlos Colindres, Library Administrator for the National University located in San Salvador
- 4.) Martha Buckley, Cultural Affairs Officer, USIS El Salvador
- 5.) Pedro Pineda, Information Resource Center Administrator, USIS El Salvador
- 6.) Cynthia Johnson, Public Affairs Officer, USIS El Salvador

ATTACHMENT B

COLLECTION WEEDING/DEVELOPMENT GUIDELINES

Draft of a Proposed Collection Development and Weeding Policy

Refer to the USAID Development Information Center Collection Development/Weeding Guidelines which are posted on the USAID Intranet (CDIE Online/Development Information Center/Resources).

Collection/Weeding Guidelines

The Library collection is intended to be as current as possible.

As a general rule, local usage patterns will dictate retention policies. If a publication is heavily used, or is a classic, or has historical value, KEEP IT!

- El Salvador Collection - Retain Country and Regional materials indefinitely
- Print materials - Weed from collection if published ten or more years ago
- Duplicate copies of publications - Weed from collection after five or more years old, unless demand warrants multiple circulating copies
- Retain works for which there has been recent proven demand or in which USAID management has indicated a current or upcoming Agency interest
- Retain works that are classics in their fields or that contain relevant information not available in more current sources
- Retain works that are part of a current series and have not been replaced by a more current edition
- Remove works containing outdated information regardless of publication date.
- Remove single volumes of multi-volume works
- Language - The Library collects French and English-language materials only.

Retention policy for specific types of materials

Annual Reports - Retain annual reports of selected donor and other organizations as comprehensively as possible; retain other annual reports for 10 years in the circulating collection.

CDIE Publications - Retain collection of paper copies of the publications of the USAID Center for Development Information and Evaluation (CDIE).

Newspapers - Retain for one week before donating or recycling.

Reference Books - Retain the most recent edition of standard reference books, unless additional copy is needed to fulfill user demand.

Serials - Retain for five years. Exceptions are made for selected core development journals, which are held as comprehensively as possible and USAID-funded serials, which are retained indefinitely

Series - Working papers and reports published by selected donor and other organizations are subject to the same 10-year retention policy as the rest of the collection.

Statistical Materials - The most current edition of statistical information sources will be kept in the reference section. Older editions of statistical sources that include substantive narrative matter that varies year to year will be moved to the circulating collection when a new edition is received.

Gift Books - Gift books, regardless of source, will be considered for inclusion in the Library collection only if they meet the same criteria applied to books that are purchased for the collection. The Library staff retains the right to discard as it sees fit books not accepted for the collection.

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ATTACHMENT C
CORE REFERENCE MATERIALS

Draft: December 17, 1997

Core USAID Resources

Planning Documents

Annual Performance Report. Washington D.C.: USAID - published annually.
Available on USAID Internet (<http://www.info.usaid.gov/pubs/apr95/>) and from Development Experience Clearinghouse (Order No.: PN-ABZ-860)

Automated Directives System (ADS) - formerly USAID Handbooks. Issued periodically on CD-ROM as DR-CD. Latest version, No.8, October 1997. Available on USAID Internet (http://www.info.usaid.gov/ftp_data/pub/handbooks/) and USAID Intranet

Policy Determinations and Policy Papers - issued by USAID on a variety of topics.
Incorporated into Automated Directives System (ADS)

Strategies for Sustainable Development. Washington D.C.: USAID, 1994.
Available from USAID Internet (<http://www.info.usaid.gov>) and from Development Experience Clearinghouse (Order No.:PN-ABQ-636)

Budget Request Documents

Congressional Presentation - published annually. Available on the USAID Internet (<http://www.info.usaid.gov/pubs/cp98/>)

Results Review and Resource Request (R4) - published annually by each mission and operating unit within USAID

Financial Reports

Current Technical Service Contract and Grants (Yellow Book). Issued annually in October by Office of Procurement. Available on the USAID Internet (http://www.info.usaid.gov/ftp_data/pub/OP/YELLOW_BOOK/)

United States Merchandise Trade with Developing Countries, 1996 edition
Analysis of trade trends between U.S. and the world, including AID-assisted countries.
Available on USAID Internet (http://www.info.usaid.gov/economic_growth/trdweb/)
Compiled from the U.S. Department of Commerce Merchandise Trade Database. Includes downloadable Lotus 123v4 files.

Performance Monitoring and Evaluations

AID Evaluation Handbook

CDIE Performance Monitoring and Evaluation Tips. Series available on CDIE Online (www.usaid.gov/cdie/evaluation publications) and from Clearinghouse

Evaluation Publications Catalog - Latest printed version is June 1995; electronic updates available on CDIE Online (www.usaid.gov/cdie/evaluation publications)

Reengineering Best Practices Series- Series available on CDIE Online (www.usaid.gov/cdie/evaluation publications)

Resource Book on Strategic Planning and Performance Monitoring Under Reengineering. Washington, D.C.: USAID, 1996.

Reengineering Resources Notebook. Washington, D.C.: USAID/PPC/CDIE/PME. Available on Intranet (<http://165.13.6.56/pme/notebook.htm>)

Other Reports

USAID Thesaurus, Washington, D.C.: USAID/PPC/Center for Development Information and Evaluation, 1991. (Order No.: PN-ABJ-677)

New Partnerships Initiative Resource Guide

Available on USAID Internet (<http://www.info.usaid.gov/pubs/npi/npiresrc.htm>)

The NPI Resource Guide brings together the results of this period of field testing and provides a number of programming tools to assist with the incorporation of NPI into Mission portfolios.

Directories

USAID Telephone Directory.

Available on Internet: (<http://hawkeye.info.usaid.gov/phonebook/pbSearch.cfm>)

Latin America and the Caribbean: Selected Economic and Social Data. Washington, D.C.: USAID, 1996. Updated annually.

Available on USAID Internet (<http://www.info.usaid.gov/regions/lac/sesd/>) and from Development Experience Clearinghouse (Order No.: PN-ABY-733)

US-AEP Clean Technology & Environmental Management Guide to the Internet by Kerith Page McFadden, Washington, D.C.: USAID, 1997. Available from Clearinghouse (Order No.: PN-ACA-749) and from Internet (<http://www.usaep.org/resource.htm>)

Voluntary Foreign Aid Programs; Report of American Voluntary Agencies Engaged in Overseas Relief and Development Registered with the U.S. Agency for International Development. Washington, D.C.: USAID/BHR/PVC, 1997. Available from Clearinghouse (Order No.: PN-ACA-199)

Core non-USAID Resources

(Note: The USAID/W Library maintains a Website within CDIE Online. Monthly new Acquisitions are included which can provide an ongoing guide to new publications available.)

General References

Adult Literacy: a Handbook for Development Workers, by Paul Fordham, Deryn Holland, and Juliet Millican. . Oxford: Oxfam, 1995.

Background Notes on Countries of the World. Washington, D.C.: State Department. Available on Internet (http://www.state.gov/www/background_notes/index.html)

CIA Factbook (<http://www.odci.gov/cia/publications>)

Congressional Yellow Book: Who's Who in Congress Including Committees and Key Staff (November 1996). New York: Leadership Directories, Inc., 1996.

Demographic Yearbook 1995. New York: United Nations: 1997.

Development Practitioners' Handbook, by Allan Kaplan. London: Pluto Press, 1996.

Early Childhood Care and Development Programs in Latin America and the Caribbean: A Review of Experience. Robert Myers,. Washington, D.C.: Inter-American Development Bank, 1995.

Economic and Social Progress in Latin America: 1996 Annual Report. Washington, D.C.: Inter-American Development Bank, 1996.

Economics of Sustainable Development, Ian Goldin and L. Alan Winters, eds. Cambridge: Cambridge University Press, 1995.

Ecotourism: a Guide for Managers and Planners, Kreg Lindberg and Donald E. Hawkins, eds. North Bennington, Vt.: Ecotourism Society, 1993.

Europa World Year Book. London: Europa. Annual.

Gender Issue in Social Policy: The Latin American and Caribbean Case. Vanessa Cartaya, Washington, D.C.: Inter-American Development Bank, 1994.

Global Data Locator. George Thomas Kurian, Lanham, MD: Bernan Press, 1997.

Guide to International Business Resources on the World Wide Web, by Candace Deans and Shaun Dakin. Thunderbird New York: John Wiley & Sons, 1997.

Guidelines for Drinking-Water Quality (Vol. 1). Geneva: WHO, 1993.

Historical Dictionary of Aid and Development Organizations, Guy Arnold. Lanham, MD: Scarecrow Press, 1996.

Human Development Report, 1997. New York: Oxford University Press, 1997.

Hunger 1997. Washington, D.C.: Bread of the World Institute on Hunger & Development, 1996.

IMF Glossary: English-French-Spanish. Washington, D.C.: International Monetary Fund, 1997.

Information Please Almanac, 1998. Boston, MA: Houghton Mifflin Company, \$10.00. Annual.

International Organizations (Encyclopedia of Associations). Detroit: Gale, 1997.

Least Developed Countries: A Statistical Profile, 1995. New York: United Nations, 1995.

Role of Foreign Aid in Development. Eric J Labs, Washington, D.C.: CBO, 1997.

Strategies for Sustainability: Latin America. London: Earthscan, 1997.

UNESCO Statistical Yearbook, 1997. Paris: UNESCO, 1997.

United Nations and the Advancement of Women, 1945-1996. New York: U.N., 1996.

World Almanac and Book of Facts, 1997. Mahwah, N.J.: KIII Reference, 1996.

World Bank Atlas, 1997. Washington, D.C.: World Bank, 1997.

World Development Report. World Bank, Annual

World Development Report, 1996: From Plan to Market. New York: Oxford University Press, 1996.

World Education Report 1995. Paris: UNESCO, 1995.

World: A Third World Guide, 1997-1998. Montevideo: Instituto del Tercer Mundo, 1997.

World of Learning, 1997. London: Europa Publications, 1996.

World Statistics Pocketbook, 1997. New York: U.N., 1997.

Year Book of Labour Statistics, 1996. Geneva: ILO, 1996.

Yearbook of International Organizations, 1997-1998. Munich: K. G. Saur, 1997.

ATTACHMENT D

USAID Development Experience Clearinghouse Document Submission Standards

The Development Experience Clearinghouse (DEC) encourages submission of USAID documents in electronic format, although hard copies are acceptable. Documents must be final; no drafts will be accepted.

All documentation must contain the following essential bibliographic elements to be provided on the title page of the document:

- Author's Name
- Descriptive Title
- Project Number
- Sponsoring USAID Office or Contract Number
- Contractor Name
- Date of Publication
- Indication of procurement sensitive information

Please send one copy of each document to:
Document Acquisitions
USAID/PPC/CDIE/DI
6.07-140U, RRB
Washington, DC 20523-6701

Telephone: 703-351-4006
Fax: 703-351-4039

Electronic Documents

- The DEC will accept files in WordPerfect, MS Word, PDF, or ASCII Text format.
- Electronic documents must be submitted on a 3.5" diskette. Agency personnel may send electronic documents by e-mail to cdie_acq@usaid.gov
- Electronic documents should "mirror" their paper counterparts. Table of contents, bibliographies, notes, and annexes should all be placed in their appropriate place in the document.
- Submit only one, fully assembled file which comprises the full document.

Paper Documents

- Paper documents must have authorizing signatures and the dates of signing present and clear.
- All volumes, chapters, parts, sections, annexes, appendices, exhibits, charts, graphs, photographs, drawings, and maps must be included in the documents in their proper places.
- Documents must be complete, legible, and free of typographical errors or handwritten notes.

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ATTACHMENT E

USAID Development Experience Clearinghouse

How to Order USAID Documents

The Development Experience Clearinghouse Document Distribution Unit (DDU) provides on-demand copies of USAID development experience materials to USAID staff, contractors and grantees, and the public. DDU receives orders by telephone, fax, internet, e-mail and letter.

When placing an order, please provide the following information:

- **Name, Address, Telephone Number**
- **Document Order Number** (*Typically begins with PN or PD*)
- **Document Title**
- **Number of Copies Requested**
- **Format (Paper, Microfiche, Electronic)**

Payment

- Documents are provided free of charge to USAID Staff.

Delivery Schedule

- USAID/W staff receive documents within one working day. Although the normal delivery schedule for documents to the public is a five-day turnaround, DDU can sometimes accommodate a shorter delivery schedule.
- All orders except microfiche are shipped at book rate (domestic) and surface rate (overseas).
- Airmail or next day delivery is available upon request.

Send your order to:

USAID Development Experience Clearinghouse
1611 N. Kent Street, Suite 200
Arlington, VA 22209-2111 USA
Tel: +1 703-351-4006; Fax: +1 703-351-4039

Internet E-Mail orders may be placed using:

docorder@disc.mhs.compuserve.com

USAID Pouch Address:

Document Order

USAID/PPC/CDIE/DI

6.07-140U, RRB

Washington, DC 20523-6701

Attachment F
Survey of Commercial Library Software Packages

PRODUCT	CDS/ISIS	MINISIS Suite	Total Library Computerization	DB/Textworks	PROCITE & Reference Manager
VENDOR	UNESCO	IDRC	On Point, Inc.	INMAGIC	Research Info. Systems
HARDWARE	Win 3.x or 95	Win 95 or NT	386; Apple Mac	Windows 3.1, 95/NT	Procite ver 4.0/Win
	Pentium, 16mb ram	Single user DOS	Network avail.	Disk Space : 10 mb	WIN95 or NT 4.0
	10 mb hard disk space	Novell or Banyan LAN	Ram determined by version	Display, Networks – supported by WIN	10mb hard disk space 16 mb ram recommended
	MS-DOS version	HP/UX; SUN/Solaris	DOS 3.0, Win 3.1 95, NT or Apple System Software		Procite ver 3.4 for Windows (3.1, 95 or NT 3.51 or higher)
	Unix version	VAX/VMS using Pathworks			
PRICE	Free of charge or at cost price	Tremendous variety depending on geographic location, type of organization, etc. Ex. For SMA: Private Sector – 1 user, \$2,600; NGO/Educ – 1 user - \$1,300. For specialized applications, ex library, approx. double the price.	Approx \$3000 (price varies - all vs indiv modules vs. LAN)	TextWorks; 1 user - \$395; 5 users \$1,450 SearchWorks; 1 user \$795; 5 users \$2,900	ProCite & BiblioLink for Win, MAC, DOS - \$395.95; Opt. Modules BiblioLink Utility 95.95
AVAILABILITY	Winisis – Win ver. Not been officially released yet Need to obtain DOS ver. First in order for databases to work in Windows ver.	SMA – ver 8.03 for DOS; development tool itself is available. The ILS should be available March 31, 1998.	Available	Available	Available

PRODUCT	CDS/ISIS	MINISIS Suite	Total Library Computerization	DB/Textworks	PROCITE & Reference Manager
VENDOR	UNESCO	IDRC	On Point, Inc.	INMAGIC	Research Info. Systems
FEATURES	<p>Created as multi-lingual software</p> <p>Handles variable length records, fields, subfields</p> <p>Powerful sort & report generation facility</p>	<p>Minisis Suite includes: Minisis database engine, SMA (general info. Mgt .System), WWW interface, STEMMA-versatile thesaurus mgt. Applic., Tailored applications through SMA (ex. Library collection)</p>	<p>Fully programmed integrated library management system which requires no "setup" procedures</p>	<p>DB/TextWorks special combination of database & text retrieval software that enables you to build networked & standalone textbases to manage diverse types of info. Including text, images & multimedia.</p> <p>Report Writer – drag & drop form design</p>	<p>Manage bibliographic info & produce bibliographies</p> <p>One- step bibliographies</p> <p>Save search strategies</p> <p>Produce & preview formatted bibliographies</p> <p>Customize Reference list display</p> <p>Designed & written expressly for windows</p>
	<p>Adv. Non-numerical info. Storage & retrieval software developed to satisfy need expressed by many instit. Esp in developing countries</p> <p>Data entry component for entering & modifying data through user-created database specific worksheets</p>	<p>Provides an economical, integrated, multi-functional info. Mgt. Tool.</p> <p>Low cost dev. & usability</p> <p>Flexible info. Retrieval & reporting</p> <p>Versatile database design/ modelling</p>	<p>Intended for smaller library management. Conceived and programmed by an experienced librarian</p> <p>Navigated by a simple system of menus, & provides various options for printing reports</p>	<p>Table Creation</p> <p>Smooth integration of images</p> <p>Can publish information on Web</p>	<p>PROCITE:</p> <p>Subject Bibliographies – an exclusive feature</p> <p>Superior Retrieval capabilities</p> <p>Two-way link to the WWW</p> <p>Reference fields & types</p> <p>Sorting</p>

PRODUCT	CDS/ISIS	MINISIS Suite	Total Library Computerization	DB/Textworks	PROCITE & Reference Manager
VENDOR	UNESCO	IDRC	On Point, Inc.	INMAGIC	Research Info. Systems
				Two options for organizing info. & performing operations: a) Library Approach – for solo librarians (Library, Supplier, Borrower, ILL, ILL-Lender); b) Catalog Approach – for libraries with staff assigned to different functions (Catalog, Serials, Loans, Supplier, Borrower, ILL, ILL-Lender)	REFERENCE MANAGER: Multiple database operations – open multiple databases & perform key operations across databases One-step editing Link to WWW Search all fields with Boolean operators or use Quick Retrieve

NOTE:

Vendors need to be contacted for detailed pricing information since there are so many variables. Prices quoted are in the ballpark area. Vendors should also be contacted for detailed specs on all products. A sampling of features was given.

Vendor Addresses:

UNESCO (CDS/ISIS)
<http://www.bib.wau.nl/isis/> (CDS/.ISIS User Group Forum)
 Nearest Distributor in Honduras
 Exc. Francisco Figueroa
 Ministro de Planificacion,
 Secretaria de Planificacion, Coordinacion y Presupuesto
 (SECPLAN)
 Apartado Postal 1327
 Tegucigalpa, Honduras
 Tel.: (+50 4) 22 03 79,
 (+50 4) 22 22 61,
 (+50 4) 22 22 62;
 Telex: 1222 CIDAPLAN HO;

Distributor code: HN

International Development Research Centre (IDRC)
PO Box 8500
Ottawa, ON K1G 3H9
Canada
info@idrc.ca

On Point, Inc
2606 36th St., NW
Washington, DC. 20007
Telephone (202) 338-8914
Fax (202) 337-7107
Email tlc@onpointinc.com

InMagic, Inc.
800 W. Cummings Park
Woburn, MA 01801-6357
(781) 938-4442
(800) 229-8398
Inmagic@Inmagic.com

Research Information Systems
Camino Corporate Center
2355 Camino Vida Roble
Carlsbad, CA 92009
Phone: (800) 722- 1227 or (760) 438-5526
Fax: (760) 438-5573
sales@risinc.com (for RIS Product Information)

ATTACHMENT G

COMPETENCIES FOR SPECIAL LIBRARIANS OF THE 21ST CENTURY

Executive Summary

October 1996

Prepared for the Special Libraries Association Board
by the Special Committee on Competencies for Special Librarians Joanne Marshall, Chair
Bill Fisher; Lynda Moulton; and Roberta Piccoli

During the Board of Directors meeting at the 1996 Annual conference, a report on competencies for special librarians was presented. The information provided in the report was considered of such great importance to special librarians that the Board members thought it deserved the widest possible dissemination. This executive summary provides the highlights of the report in the form of a separately published document that can be shared with colleagues, educators, students and employers.

The Special Libraries Association (SLA), an organization of dynamic and change-oriented information professionals, has long been interested in the knowledge requirements of the field. The Association's members have explored and shared their vision of the competencies and skills required for special librarianship in many forums over the years. This document is an attempt to synthesize and build upon this earlier work in the light of the rapid social, technological and workplace transformations that are taking place.

In the information age, special librarians are essential - they provide the information edge for the knowledge-based organization by responding with a sense of urgency to critical information needs. In order to fulfill this key role, special librarians require two main types of competencies:

Professional Competencies relate to the special librarian's knowledge in the areas of information resources, information access, technology, management and research, and the ability to use these areas of knowledge as a basis for providing library and information services.

Personal Competencies represent a set of skills, attitudes and values that enable librarians to work efficiently; be good communicators; focus on continuing learning throughout their careers; demonstrate the value-added nature of their contributions; and survive in the new world of work.

The following sections highlight the major professional and personal competencies of special librarians and provide practical examples of the multitude of roles and tasks that special librarians can perform.

1. PROFESSIONAL COMPETENCIES

The Special Librarian...

- 1.1 Has expert knowledge of the content of information resources, including the ability to critically evaluate and filter them.

Practical examples: Evaluates print CD-ROM and online versions of databases. Knows "the best" textbooks, journals and electronic resources in specific areas such as biology, marketing and accounting. Evaluates and selects key information resources, print and electronic, for a small research center. Sets up a desktop news wire service for a petrochemical company. Controls the over supply of information by selecting what is relevant and usable for the customer. Uses strategic thinking to perform information selection and analysis that meets specific organizational goals.

- 1.2. Has specialized subject knowledge appropriate to the business of the organization or client.

Practical examples: In addition to their Masters degree in library and information studies, many special librarians have subject degrees at the undergraduate and postgraduate levels. Librarians frequently take additional courses in finance, management or other subjects related to their host organization. The librarian monitors and scans the organization's area of business by reading core journals and other key sources. This enables the development of in-depth, subject specialty information services, including current awareness.

- 1.3. Develops and manages convenient, accessible and cost-effective information services that are aligned with the strategic directions of the organization.

Practical examples: Develops a strategic plan linked to the business goals of the organization. Sets up effective management, supervision and budget processes. Builds an effective information services staff team. Conducts intermediary searches for complex, difficult or multifile searches. Obtains documents in print or electronic form. Builds a core in-house library collection. Analyzes and synthesizes information as required. Develops specialized thesauri and lists of indexing terms for databases.

- 1.4 Provides excellent instruction and support for library and information service users.

Practical examples: Teaches Internet courses for employees. Develops specialized end-user searching courses on information resources related to current business goals. Keeps up to date with the latest training and instructional techniques. Provides trouble-shooting service for employees who are accessing information services from the desktop. Provides online reference and assistance.

- 1.5. Assesses information needs and designs and markets value-added information services and products to meet identified needs.

Practical examples: Conducts regular needs assessments using research tools such as questionnaires, focus groups and key informant interviews. Reports the results to management and demonstrates the relationship between needs and the services provided. Identifies and meets information needs by becoming a member of project teams. Contributes unique or unusual needs assessment findings to the professional literature.

- 1.6. Uses appropriate information technology to acquire, organize and disseminate information.

Practical examples: Creates an online catalog of the library collection. Links catalog searching to a document delivery service. Works with the information management team to select appropriate software and hardware for desktop access to the library catalog and other databases. Provides a support service for electronic information service users. Keeps up-to-date with new electronic information products and modes of information delivery.

- 1.7. Uses appropriate business and management approaches to communicate the importance of information services to senior management.

Practical examples: Develops a business plan for the library. Calculates a return on investment for the library and its services. Develops a marketing plan for the library. Conducts a benchmarking study. Reports to management on continuous quality improvement efforts. Demonstrates how library and information services add value to the organization. Acts as a resource for the organization on quality management, including ISO 9000 certification.

- 1.8. Develops specialized information products for use inside or outside the organization or by individual clients.

Practical examples: Creates databases of in-house documents such as reports, technical manuals or resource materials used for special projects. Creates searchable full-text document files. Makes available online technical manuals. Creates a home page on the World Wide Web for the organization. Links the home page to other sites of interest on the Internet. Participates in knowledge management activities that create, capture, exchange, use and communicate the organization's intellectual capital.

- 1.9. Evaluates the outcomes of information use and conducts research related to the solution of information management problems.

Practical examples: Gathers data related to needs assessment, program planning and evaluation. Develops measures of frequency of use of services, customer satisfaction and impact of information on organizational decision-making. Actively seeks opportunities for improvement

and strives to be the best-in-class on key services such as current awareness, reference and resource sharing. Participates in research projects.

1.10. Continually improves information services in response to changing needs.

Practical examples: Monitors industry trends and disseminates information to key people in the organization or to individual clients. Refocuses information services on new business needs. Uses just-in-time document delivery to retain maximum flexibility. Monitors purchases of information products by departments to ensure that they are cost-effective and aligned with current business needs.

1.11. Is an effective member of the senior management team and a consultant to the organization on information issues.

Practical examples: Participates in strategic planning in the organization. Participates in benchmarking and re-engineering teams. Informs management on copyright issues and monitors compliance with copyright law. Negotiates contracts with database vendors. Obtains patent information. Develops information policies for the organization.

2. PERSONAL COMPETENCIES

The Special Librarian...

2.1. Is committed to service excellence.

Practical examples: Seeks out performance feedback and uses it for continuous improvement. Conducts regular user surveys. Asks library users if they found the information to be relevant and of value. Celebrates own success and that of others. Takes pride in a job well done. Shares new knowledge with others at conferences and in the professional literature. Uses the research knowledge base of special librarianship as a resource for improving services.

2.2. Seeks out challenges and sees new opportunities both inside and outside the library.

Practical examples: Takes on new roles in the organization that require an information leader. Uses library-based knowledge and skills to solve a variety of information problems in a wide range of settings. Expands the library collection beyond traditional media such as books and journals. Creates the library without walls.

2.3. Sees the big picture.

Practical examples: Recognizes that information-seeking and use are part of the creative process for individuals and organizations. Sees the library and its information services as part of the bigger process of making informed decisions. Gives the highest priority to urgent demands for

information that are critical to the organization's competitive advantage. Monitors major business trends and world events. Anticipates trends and pro-actively realigns library and information services to take advantage of them.

2.4. Looks for partnerships and alliances.

Practical examples: Seeks alliances with management information systems (MIS) professionals to optimize complementary knowledge and skills. Provides leadership on the information management team. Forms partnerships with other libraries or information services inside or outside the organization to optimize resource sharing. Seeks alliances with database vendors and other information providers to improve products and services. Seeks alliances with researchers in faculties of library and information studies to conduct relevant and practical studies.

2.5. Creates an environment of mutual respect and trust.

Practical examples: Treats others with respect and expects to be treated with respect in return. Knows own strengths and the complementary strengths of others. Delivers on time and on target and expects others to do the same. Creates a problem-solving environment in which everyone's contribution is valued and acknowledged. Helps others to optimize their contribution.

2.6. Has effective communications skills.

Practical examples: Listens first and then coaches staff and others to develop their own solutions. Supports and participates in mentorship programs and succession planning. Runs meetings effectively. Presents ideas clearly and enthusiastically. Writes clear and understandable text. Uses plain language. Requests feedback on communications skills and uses it for self-improvement.

2.7. Works well with others in a team.

Practical examples: Learns about the wisdom of teams and seeks out opportunities for team participation. Takes on responsibility in teams both inside and outside the library. Mentors other team members. Asks for mentoring from others when it is needed. Constantly looks for ways to enhance personal performance and that of others through formal and informal learning opportunities.

2.8. Provides leadership.

Practical examples: Learns about and cultivates the qualities of a good leader and knows when to exercise leadership. Can share leadership with others and allow others to take the leadership role. Exercises leadership within the library and as a member of other teams or units within the organization. Seeks opportunities for leadership in the profession. Acknowledges the contribution of all members of the team.

2.9. Plans, prioritizes and focuses on what is critical.

Practical examples: Recognizes that, in order to use resources most effectively, ongoing careful planning is required. Develops an approach to planning and time management that incorporates a balance of personal and professional goals. Reviews goals on a regular basis, prioritizes them and makes sure that an appropriate proportion of daily activities are related to the most critical personal and professional goals. Mentors others to do the same.

2.10. Is committed to lifelong learning and personal career planning.

Practical examples: Committed to a career that involves ongoing learning and knowledge development. Takes personal responsibility for long-term career planning and seeks opportunities for learning and enrichment. Advocates for a work environment that encourages and supports ongoing knowledge development and that values the contribution of people. Maintains a strong sense of self-worth based on the achievement of a balanced set of evolving personal and professional goals.

2.11. Has personal business skills and creates new opportunities.

Practical examples: Recognizes that, in the changing world of work, entrepreneurship and the ability to function as a professional in a small business are essential skills. Seeks out opportunities to develop these skills. Willing to take employment in a variety of forms including full-time, contract and project work. Uses the entrepreneurial spirit in the organizational environment to revitalize products and services.

2.12. Recognizes the value of professional networking and solidarity.

Practical examples: Active in SLA and other professional associations. Uses these opportunities to share knowledge and skills, to benchmark against other information service providers and to form partnerships and alliances. Recognizes the need for a forum where information professionals can communicate with each other and speak with one voice on important information policy issues, such as copyright and the global information infrastructure.

2.13. Is flexible and positive in a time of continuing change.

Practical examples: Willing to take on different responsibilities at different points in time and to respond to changing needs. Maintains a positive attitude and helps others to do the same. Never says it cannot be done. Looks for solutions. Helps others to develop their ideas by providing the right information. Always on the lookout for new ideas. Sees and uses technology as an enabler of new information ideas, products and services.

CONCLUSION

These are the competencies of special librarians for the 21st century. They have their roots in the past, but they reach far into the future. The competencies form the basis for the continued survival and growth of special librarianship in the information age. Special librarians recognize the expanding nature of the challenges that face them and the range of competencies that are required. The challenges represented by these competencies must be seized and acted upon today in order to ensure that special librarians have a viable tomorrow.

The Special Committee on Competencies hopes that this document will evolve and grow through continuing discussion of our expanding base of knowledge and skills. We encourage SLA members to share additional practical examples of what they do with their competencies so that we can continue to learn from each other and celebrate our achievements. The full version of this document contains a bibliography on the competencies of special librarians, the value of special libraries and the changing nature of the field.

Source: Special Libraries Association Home Page
(<http://www.sla.org/professional/competency.html>)

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ATTACHMENT H

SCOPE OF WORK

TECHNICAL ASSISTANCE FOR USAID/EL SALVADOR LIBRARY AND INFORMATION SERVICES

I. BACKGROUND

PPC's Center for Development Information and Evaluation (CDIE) seeks to improve the use of information on development experience and program performance by USAID to achieve development results. PPC/CDIE has the responsibility of acquiring and disseminating USAID's development experience information to help the Agency learn from experience and more successfully pursue its sustainable development goals. It creates and maintains USAID's "institutional memory" of development experience documents; makes it available to the Agency and our development partners; and draws on this experience to provide responsive reference and research services that enable lessons learned to be reflected in policy formulation and program planning and implementation.

In addition, PPC/CDIE provides technical assistance to the Agency to improve the Agency's institutional memory program through training, service and outreach activities.

ARTICLE I. TITLE

Technical assistance for an assessment of the library, documentation, and information services at USAID/El Salvador.

ARTICLE II. OBJECTIVE

To assess the information collection and services at USAID/El Salvador to assist the mission in developing a strategy to better organize its information resources and to make those resources more readily available to users.

ARTICLE III. STATEMENT OF WORK

PPC/CDIE will review the documentation collection and information services at USAID/El Salvador. The TDY team will:

- assess the information collection and services at USAID/El Salvador to assist the mission in developing a strategy to better organize its information resources and to make those resources readily available to its users;
- review the extant library collection and make recommendations for the ultimate disposition of the older materials (pre 1987) to CDIE and/or an in-country library;

- conduct briefings and provide training on the recently available CDIE Online HomePage which will enable the mission to determine which records are already integrated into the Agency's Development Experience System (DEXS);
- review and analyze appropriate reengineering documentation; and,
- prepare a report on TDY findings within 30 days.

Other relevant issues of interest to the CDIE TDY team include:

- How electronic documents/records are being created and managed by the mission; and,
- How the mission is documenting its development assistance activities under the Agency's reengineered procedures, particularly evaluations.

ARTICLE IV. LEVEL OF EFFORT/PERFORMANCE PERIOD

The estimated level of effort is ten (10) person/days for two people. Five (5) person/days for each TDY team member. A five-day work week is contemplated. One experienced Senior level Librarian/Records Management specialist, and one Development Information Specialist whose specialty is Agency LAC Regional and Mission documentation.

ARTICLE V. RELATIONSHIP AND RESPONSIBILITIES

PPC/CDIE will prepare travel authorizations and arrange for travel. USAID/El Salvador will arrange for country clearances, lodging and provide office space and logistics to enable the TDY team to perform their mission in an effective and efficient manner.

ARTICLE VI. REPORTS AND PAYMENT

Debriefing: Before departure from El Salvador, the CDIE team will conduct a debriefing session in which they will advise the Mission on the most important findings of their TDY and their recommendations.

Written Report: Within thirty days following conclusion of their mission in El Salvador, the TDY team will submit to the USAID/El Salvador and PPC/CDIE/DI a written report which will include a detailed presentation of the teams findings and recommendations on appropriate approaches to the organization, access and disposition of the library's information resources and the provision of information services to Mission staff. The report will also include the team's findings on electronic document/records management and the Mission's current practices in documenting its development activities.

Payment: PPC/CDIE pays for TDY with no billable cost to USAID/El Salvador. Contractor labor and TDY costs will be billed to PPC/CDIE contract AEP-C-00-0097-00002 with LTS Corporation.