

THE UNIVERSITY OF SHEFFIELD

DEPARTMENT OF INFORMATION STUDIES

# **THE EDUCATIONAL ROLES OF PUBLIC LIBRARIES IN PORTUGAL**

## **POLITICAL AND PROFESSIONAL PERCEPTIONS**

by

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A study submitted in fulfilment of the requirements

for the degree of Doctor of Philosophy

JULY 2001

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### ABSTRACT

This study examines the educational roles of public libraries in Portugal, as perceived by elected members and public librarians.

The research was undertaken in 15 local authorities throughout the country, selected by purposeful sampling from the responses to a preliminary questionnaire. The methodology used a grounded theory approach and the core data were obtained via semi-structured interviews with 53 respondents.

The data suggest that the respondents view public libraries as having well established roles in the fields of literacy, reading promotion and up to some extent, lifelong learning. Diverse sectors of the community are considered as beneficiaries of the library support to learning, including children and young people, higher education students, teachers and adult learners. The public library also helps vulnerable people overcome geographical, economic and age barriers to education.

The evidence obtained by this study suggests that these roles are more relevant in a country such as Portugal that has generally low levels of literacy and poor socio-economic indicators. The views of the respondents acknowledge this relevance, but differences of opinion emerge from the data suggesting some partial and limited opinions on the educational roles, especially the support for lifelong learning.

This study suggests that several factors may influence the perceptions of the respondents. These factors include the socio-economic and educational context in which public libraries operate and a poor public perception of library roles, caused by the relative newness of public libraries in Portugal. Individual and local factors, such as the education and professional experience of the respondents and the size of the local authorities may also influence perceptions. The managerial and legal context is characterised by lack of legislation on public libraries and a traditionalist and bureaucratic organisational culture. The absence of an underlying philosophy on the roles of libraries in education is very apparent in the lack of research and publications in this field.

A number of recommendations are put forward: legislation on public libraries, including on their educational roles, the publication of standards and guidelines, the increase of resources, especially staff and finance. Further research on the educational roles of public libraries is also recommended.



IN MEMORY OF MY PARENTS CÂNDIDA AND ANTÔNIO

TO MY BELOVED DAUGHTERS HELOÍSA AND ANABELA

## ACKNOWLEDGEMENTS

Many people have contributed in diverse ways to my studies that lead to the completion of this work.

First and foremost, my thanks go to my supervisor, Professor Robert Usherwood. I could not have hoped for a more supportive and enthusiastic mentor. His wisdom is only matched by an unabashed and contagious faith in the value of libraries. His advice, his guidance and his availability made an invaluable contribution to my studies. Doctor Joaquina Barrulas was also a precious advisor and her encouragement and guidance were essential especially in the first phase of my work.

The stimulating and friendly environment of the Department of Information Studies was essential for my work, and I am grateful to all those that have helped me there.

I would like to thank especially to some friends: Doctor Miguel Nunes and Suzana, his wife, for the many discussions we had, but especially for their friendship and support. In the Department I made a good number of friends to whom I am grateful: Mariano, Allen, Hideo, Helene, and, especially, Georgia. I would also like to thank my Portuguese colleagues in the Department Antonieta and Armando.

In Portugal, many friends, colleagues and relatives have provided invaluable support and encouragement for my studies. I want to thank in particular Ana Paula Gordo, Carlos Matias, Fernanda Eunice, Gabriela Lopes da Silva, José Oliveira, Lourenço Calisto Aires, Maria José Moura and Paulo Curto. I also want to thank Rosa, my companion of many years, without whose support and stimulus my study would not even have started.

This research was financed by:

**FCT** Fundação para a Ciência e a Tecnologia

MINISTÉRIO DA CIÊNCIA E DA TECNOLOGIA

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# INTRODUCTION

### 1.1. Background

Public libraries have been considered as having educational roles since their inception (Sturges, 1996), but the last few decades have witnessed a tendency to focus on and develop these roles further (Astbury, 1994).

The reasons for this include the changes in education that have stressed the importance of the student's learning experience, focusing on learning and information skills as well as on group work and assignments (Herring, 1996). In addition, lifelong learning came to the forefront of the pedagogical debate alongside major changes in the economy and in the labour market that have stressed the individual and social need for continuing education and retraining (Longworth, & Davies, 1996). Fast developments in Information and Communication Technology (ICT) have opened up new opportunities for individual learning, decreasing barriers of time and distance, whilst emphasising the need for new and updated skills.

The roles of public libraries in providing books and in supporting children's reading skills and the curriculum are well established and remain relevant (Elkin & Kinnell, ed., 2000). However, recent research has demonstrated how the public library may be a place for children in a wider sense, calling attention to other benefits that children may obtain from public libraries. These include support with homework (Train, et al., 2000), to IT literacy (Batt & Kirby, 1996) and to social skills (Elkin & Lonsdale, 1996).

The role of public libraries in supporting adult literacy (Bramley, 1991) and lifelong learning (Brophy, Allred & Allred, 1996) has also been growing, in spite of some

disagreement amongst library professionals (Strong, 1998), and some reluctance of the educational field to consider the roles of public libraries (Cole, 2000).

The social benefits of public libraries' support to education have also been gaining increased attention. Public libraries may help learners of all ages to overcome barriers to education, such as distance, poverty or cultural background, contributing thus to social equity (Matarasso, 1998b). Equally, public libraries have been seen as an individual and cultural meeting point (Linley & Usherwood, 1998), contributing to people learning about themselves and their communities, via services such as Local Studies (Greenhalgh & Worpole, 1995).

This focus on education is taking place at a time when the number of public libraries in Portugal is increasing. In 1987 a national programme was set up with the purpose of providing each one of the 275 municipalities with a public library following internationally accepted professional standards. The number of libraries opened at the time of writing is close to 100 and many others are presently being built.

Portugal has some of the lowest social and economic indicators in the European Union, and is amongst those with the lowest levels of literacy (OECD, 2000). This scenario makes the role of public libraries all the more relevant in supporting literacy and lifelong learning and in contributing to social equity. However it may also pose serious constraints to the development of these institutions, due to financial constraints and an unclear public perception of the library role caused by the fact that they are virtually a new reality in the Portuguese context. The starting point of these developments was very low and before it public libraries were virtually non-existent. New library staff are being trained but their number is still insufficient for the needs.

The new public libraries in Portugal are being built at a period of great transformations in technology, in economy, in society and in education. If the efforts made so far are to be successful, they have to take these transformations into account. Otherwise that country might be building for the future the libraries of the past.

## **1.2. Justification of the study**

Research on public libraries in Portugal is timely, and, indeed, overdue, since a sound theory is necessary to underpin practical developments.

The advancement of public libraries in Portugal has not been accompanied by research in the field of public librarianship, and more specifically on the educational roles of public libraries. The lack of an underlying philosophy on the roles of libraries in education is clearly illustrated by the distinct shortage of literature and the absence of guidelines for the development of these roles.

Considering the background described in the previous section, especially the increasing focus of public libraries on education that is taking place in many parts of the world, the opportunity of the present research appears to be beyond discussion.

## **1.3. Aims and objectives**

This study aimed at increasing knowledge about the diverse ways in which Portuguese public libraries may help the development of individual learners and of the communities. It is about the perceptions of Portuguese elected members and librarians on the educational roles of public libraries, and raises a number of issues which may enlighten a field of studies about which little is yet known in Portugal.

Based on the literature, a number of roles were identified as educational roles of public libraries (Vd. Table 4). The analysis of the data obtained by this study suggested that these roles may be considered in the fields of support for literacy, lifelong learning and formal education. Furthermore, a number of managerial issues that may influence the capacities of libraries playing these roles emerged from the data and were confirmed by the literature.

Within this framework, the objectives of this study were:

- To develop a methodology and research tools for studying the perceptions of Portuguese elected members and librarians on the educational roles of public libraries.

- To develop a coherent model of the services and activities considered as having educational impact on individuals and communities.
- To investigate how the perceptions of librarians and elected members relate to the specific educational situation and to the present stage of development of public libraries in this country.
- To examine the reasons why Portuguese librarians and elected members have developed their views about the educational roles of public libraries.
- To propose a number of measures that may be taken to help public libraries in Portugal to play a more meaningful role in supporting education.

As shall be discussed in chapter 3, this study used a grounded theory approach for obtaining and analysing the data, and this had strong implications in designing the study, due to the “naturalistic and inductive nature” of the research (Patton, 1980: 59). He argues in favour of design flexibility, and in the present study, the objectives set before the research have to be considered as flexible guides for the research, as much would depend on what emerged from the data obtained during fieldwork. As Lincoln & Guba (1985: 225) suggested, “the design of a naturalistic inquiry (...) cannot be given in advance; it must emerge, develop, unfold...”

While the academic framework of the present study required a detailed research proposal, these objectives have to be considered as flexible guides for the study, in the light of the qualitative methodological approach.

## **1.4. Significant themes and research**

As shall be discussed in detail in chapter 3, a fundamental methodological premise of this study is that the findings are grounded on the empirical data, which always takes precedence over the literature. This adds to the findings by putting the data into context, by helping in discussing, clarifying and validating them, and by increasing theoretical sensitivity (Strauss & Corbin, 1994). It was decided not to present a separate chapter as a literature review but instead include it in the context

of the discussion of the findings. However, a brief presentation of previous themes and research carried out on the topic of public libraries and education may help to put the present study in the broader context of the theoretical trends in this field, identifying the studies that have helped in discussing the findings.

Most of this literature originates in research carried out in the United Kingdom and to some extent at a European level, and whenever it was considered relevant, American studies were also considered. This is due to two main reasons: first, and most important, is the fact that studies in library and information studies are very scarce in Portugal and thus reports are rare. This could be seen as a limitation but on the other hand it points to the relevance of this study. Second is the fact that this study was carried out in a British University with a much easier access to British bibliographic sources.

The most significant literature falls into three main categories: policy papers and guidelines issued by governments or professional bodies, reports from empirical research using quantitative and mainly qualitative methods, and books that do not result directly from research. These works are presented broadly following the main themes that organise the present report.

#### **1.4.1. Public libraries and education**

The growing relevance of the educational roles of public libraries has been recognised at international level by both the UNESCO *Public library manifesto* (UNESCO, 1995) and the new IFLA (2001) guidelines, *The Public Library Service: The IFLA/UNESCO Guidelines for Development*. These documents, while not focusing exclusively on the educational roles, either have separate sections that address them or include educational issues with diverse degrees of relevance, and the key missions of public libraries considered by the Manifesto clearly reflect this focus.

In the United Kingdom, *New library: the people's network* (Great Britain, Library and Information Commission, 1997) may be seen as the flagship of the new attitude towards public libraries of the new Labour Government appointed that year, which (at least in theory) established education as its main priority. The vision of the *New*



*Library* is clearly marked by the relevance of ICT and networking for the educational development of the communities. A number of measures were proposed in three main areas: the building of a technological infrastructure, the production of content, and the training of library staff.

The fact that public libraries may play a key role in supporting education had been suggested in previous studies. These include the *Review of the public library service in England and Wales for the Department of National Heritage* (Aslib, 1995) and *Borrowed time? : the future of public libraries in the UK* (Comedia, 1993). Based on the data of the latter, *Libraries in a world of cultural change* (Greenhalgh, & Worpole, 1995) was published. These works reflect the social and political climate of the early 1990's, characterised by cuts in public expenditure and a prevalence of the private sector. Public libraries in Britain appear affected by a deep contradiction: while these works demonstrated their potential and popularity, the extension of their use and the value they had for the communities, they were clearly in decline, with constant financial cutbacks, diminishing staff and even closures. Their value is partially associated with the support they provide to the education of children and adults, included in a wider set of roles in information provision, social policy, cultural enrichment and economic development (Comedia, 1993)

The relevance of ICT for the educational roles has been a recurrent theme in several works published in the United Kingdom and under the auspices of the European Union. *Public Libraries and the Information Society* (Segbert, ed., 1997) is the most significant of these. Considering the public library as "the local learning centre" (page 15), its findings matched the development of technologies in education, specifically the use of multimedia and networked learning. The new professional profiles of librarians in a networked environment, highlighting their roles as educators and network navigators, are discussed in the chapter on human resources.

In Portugal, there has not been any research on the educational roles of public libraries, but some general writings address the issue, albeit briefly. The government report *Leitura pública : rede de bibliotecas municipais : relatório* (Moura, ed, 1986) is

by far the most influential piece of writing regarding public libraries, if not in theoretical terms, certainly in terms of the programme of new libraries that it started. This report is discussed in some detail in chapter 2 of the present research.

Another report by the Ministry of Culture published ten years later, *Relatório sobre as bibliotecas públicas em Portugal* (Moura, ed., 1996) is far from having had a similar impact both at political and professional levels. However the discussion of the educational roles is much more present, addressing issues such as lifelong learning, community information and the support to school libraries and to university students.

Some educational aspects, such as Local Studies services, and the roles of children's libraries are included in the topics addressed by *Da biblioteca ao leitor* (Nunes, 1996), a collection of writings that may well be considered as a summary of the changes that have been taking place in Portuguese public libraries.

#### **1.4.2. Support to literacy and children's development**

The widening of the concept of literacy has increased the relevance of the support of public libraries to children's education. In the past, literacy has been defined as the ability to read and write printed materials, but the concept has evolved during the last decades with the emergence of the notion of functional literacy. Scribner and Cole (1981) wrote that "literacy is not simply knowing how to read and write a particular script but applying this knowledge in specific contexts of use". Audio-visual and digital materials have widened the use of the concept, encompassing the new media, hence the concept of "new literacies" (Lonsdale, 2000).

Literacy has been considered as having major individual and social implications (OECD, 2000). The levels of literacy amongst the Portuguese population have been considered as very low by several studies. *A literacia em Portugal: resultados de uma pesquisa extensiva e monográfica* (Benavente, 1996) pointed to a low level of literacy amongst the Portuguese population, a conclusion which was confirmed by *Literacy in the information age: final report of the international adult literacy survey* (OECD, 2000).



Support of children's literacy is a major educational role of public libraries, which has attracted increasing attention from researchers and Government departments in the United Kingdom. The report *Investing in children* (Great Britain, Department of National Heritage, 1995) was seminal in drawing attention to the potential of the public library "as a force in support of reading and information literacy" (page v) and in relating it to the economic and cultural growth of the country. Its recommendations include the need for local authorities and the government to have an integrated strategy for the delivery of library services to children, and the need for research "which explores the benefits, impacts and effectiveness of library provision for children and young people" (page 18).

The idea that children's development may be helped by the public library in a great number of areas (educational, social, language, intellectual and emotional development) was suggested by *Children and young people: Library Association guidelines for public libraries* (Blanshard, 1997a). This idea was reinforced by a large-scale piece of research in the United Kingdom: *A place for children: public libraries as a major force in children's reading* (Elkin & Kinnell, ed., 2000). It "showed overwhelmingly how public libraries can support children's development, improving their reading skills and helping them to grow intellectually, socially and culturally" (page 115). This study also highlighted the need to approach the child as an individual and to consider a wide diversity of situations affecting children.

In spite of these findings, the roles of public libraries in supporting children's development have been scarcely acknowledged by library authorities and by researchers. *Focus on the child: libraries, literacy and learning* (Elkin & Lonsdale, ed., 1996), while highlighting the potential for public libraries to support children's literacy and reading, presented a gloomy picture of the situation in the United Kingdom. This was characterised by "huge variations in standards from local authority to local authority, some with no obvious focus on library work with children, other than through the schools library service" (page 240). Adding to this, this work acknowledges the "little awareness of the role of children's librarians" (page 240), and "a decline in the study of children's, schools, and public librarianship in the Library Schools" (page 241).

One survey was conducted into the services for children and young people in Portuguese public libraries: *Os serviços para crianças e jovens nas bibliotecas públicas portuguesas*" (Figueiredo & Calixto, 1998). The findings reasserted previous evidence of a relatively low level of service, including shortages of staff and poor ICT. On a positive note, however, the data confirmed growing levels of utilisation, a close relationship with schools, and a wide set of activities aiming at the promotion of reading and of library use.

The Portuguese Ministry of Culture established in 1996 the Observatory of Cultural Activities, which has produced research on reading habits. Whilst much of this research has been actually carried out in public libraries, it has focused mainly on books and reading while the consideration of the impact of public libraries on children's literacy has been only marginal. In spite of this, one of the conclusions of *Bibliotecas e hábitos de leitura: balanço de quatro pesquisas* (Lopes & Antunes, 1999) points to the "structuring roles of public libraries as active cultural protagonists in their local communities" (page 53), and to the use of public libraries predominantly by children and young people.

Public libraries support children's development and education providing a wide set of facilities, materials and services. These include the provision of books, audio-visual materials and ICT resources; a place to study, meet and socialize; and support, advice and guidance by specialised staff (Elkin & Kinnell, ed., 2000). At international level, *Guidelines for Children's Services* (Fasick, ed., 1991) and the *Guidelines for Young Adult Services* (IFLA, 1996), both published by IFLA, have contributed greatly to raising awareness of the roles of public libraries in children's education, and provide many examples of these services.

Some aspects of the support children may have from public libraries have attracted the attention of researchers and practitioners especially during the last few years. Train [et al.] (2000) studied *The value and impact of homework clubs in public libraries* and concluded that they were highly relevant to children's school attainment, especially for those with a deprived background. Learning information skills is another benefit that children may obtain by using the public library services,

in spite of the fact that most authors consider this mainly as a responsibility of the school (Herring, 1996).

Public library's support of children's education may also be achieved in an indirect way, via support to schools and to teachers. The suggestion that children benefit if public libraries and schools are key partners is recurrent in the literature (Denham, 2000; Greenhalgh & Worpole, 1996), and teachers have often been considered as the best way of reaching children (Denham, 2000). A major feature of the support to schools has been the Schools Library Services (Herring, 1988; Heeks, 1986). Whilst school libraries in Portugal have been and still are very poor, important changes have been taking place since 1997. The report *Lançar a rede de bibliotecas escolares* (Veiga, ed, 1997) presented the framework for the development of school libraries in Portugal and proposed a close collaboration with local authorities and public libraries, acknowledging the importance of their support for school libraries.

#### 1.4.3. Support to lifelong learning

The concept of lifelong learning gained renewed importance worldwide during the last decades of the 20<sup>th</sup> Century due to a set of economic, social and educational changes that have taken place. A theoretical framework and a number of data on the recent developments of lifelong learning were provided by *Lifelong learning: new vision, new implications, new roles for people, organizations, nations and communities in the 21<sup>st</sup> century* (Longworth & Davies, 1996), which may also be considered as a practical guide for decision makers in the field of lifelong learning. However, as many other writings on lifelong learning, it ignores the roles of libraries in supporting lifelong learners.

However, the library field has been asserting for some time their potential for playing a major role in supporting lifelong learning. A major conference took place in 1995 in Washington on the theme of *Public Libraries and Community-Based Education: Making the Connection for Lifelong Learning*. The themes emerging from this conference include definitions of community-based education and lifelong learning and the collaboration among providers of community-based education services, including public libraries. Two of these papers spelt out clearly the roles of public

libraries in lifelong learning: *Public libraries, lifelong learning and older adults: background and recommendations* (Van Fleet, 1995), and *Community-based organizations and the delivery of lifelong learning opportunities* (Galbraith, 1995).

A distinct theme of the debate on the work of public libraries in lifelong learning has been the role of libraries as supporters of learning as opposed to the one of simple providers of materials, and of librarians as educators and facilitators of learning. This was stressed in *Open distance learning in public libraries* (Brophy, Allred & Allred, 1996), a thorough examination of current practice in the European Union, and a useful theoretical framework for the development of the support given to lifelong learning in public libraries. This is one of a set of studies financed by the European Union addressing the roles of libraries in supporting learning during the 1990's. Other studies include *Public Libraries and Adult Independent Learners* (PLAIL) (Clwyd County Council, 1996) and *Library Integrated System for Telematics-based Education* (LISTED) (Watkin, 1998), both with the participation of Portuguese public libraries. Following up these studies, an international conference has taken place regularly which originated a series of proceedings that are edited under the title *Libraries without walls* (Brophy, Fisher & Clarke, eds., 1998). These proceedings constitute updated repositories of the most recent theory and practice in this field as they have contributions from academics and practitioners from many countries and address several kinds of libraries. A new and relevant source of information in this field of studies is *The new review of libraries and lifelong learning* (Brophy, 2000).

The support to lifelong learning in public libraries takes into account two different kinds of learning: deliberate learning and unintentional learning (Galbraith, 1995). Whilst much of the focus has been on deliberate learning (Brophy, Allred & Allred, 1996), other authors, such as Batt (1998), have called attention to the perspective of unintentional learning. Public libraries in Portugal have focused on unintentional learning (Calixto, 1996), as shall be discussed in this study.

In the United Kingdom, wide and re-invigorated interest in lifelong learning has been emerging especially since 1997. In the context of the Government focus on education, lifelong learning was seen as a strategic way of improving the general

educational level of the country. The vision of what this new age would be was put forward by the green paper *The Learning Age: a renaissance for a new Britain* (Great Britain, Department for Education and Employment, 1998). Public libraries were considered as key access points to the National Grid for Learning, another Government initiative aimed at making educational resources available throughout the country, proposed in *Connecting the learning society: national grid for learning* (Great Britain, Department for Education and Employment, 1997). Lifelong learning is also an important focus of *New library: the people's network* (Great Britain, Library and Information Commission, 1997) which also stressed the relevance of the use of computer mediated communications for learning.

Co-operation and networking is another major theme in the discussion about the roles of public libraries in lifelong learning, made especially relevant by the growing use of ICT. This has been stressed in all the above mentioned documents and is exemplified by the work of consortiums such as EARL (Dolan, 1997)

#### **1.4.4. Libraries, communities and education**

The role of public libraries in helping the learning development of individuals and communities has been a major theme included in a line of research that developed in the UK in the late 1990's focusing more generally on the social impacts of public libraries. The impacts on skill development and on the communities were two of the main areas stressed in *The social impact of public libraries: a literature review* (Kerslake & Kinnel, 1997). If this review of the literature may be considered the starting point of this string of studies, *Learning development: an introduction to the social impact of public libraries* (Matarasso, 1998a), despite its title, could well be considered its conclusion, since it may be seen as a detailed and commented review of the studies that have meanwhile taken place.

A key argument in this set of studies was that the traditional ways of measuring the performance of libraries were no longer adequate to measure their social impact. This is reflected in the titles of both *New measures for the new library: a social audit of public libraries* (Linley & Usherwood, 1998), and *Beyond book issues: the social potential of library projects* (Matarasso, 1998b). The former studied the impact of



public libraries in the City of Newcastle and the County of Somerset, and concluded that public libraries continue to have their established roles in the fields of culture, education, reading and literacy, and information. However, the study unveiled evidence of roles that have not been so easily perceived: the social and caring roles. *Beyond book issues* reviewed 18 library projects throughout the country stressing the often unseen importance of libraries to their communities in terms of education and literacy, social cohesion and community empowerment.

The benefits obtained by especially vulnerable groups by using the public library and attending its activities are other themes emerging from these studies. These groups include the elderly and those disadvantaged by factors such as poor health, distance, cultural and educational background and poverty. For these groups, the public library emerges as a local community service free of charge, in a world dominated by economy and globalisation. These studies have also highlighted how these groups may use the public library as a meeting and socialising place and how the Local Studies services may help to raise the community image and self-confidence.

#### **1.4.5. Managerial issues**

A number of managerial aspects may influence an effective delivery of library services. These issues include resources (such as facilities and equipment, ICT, books and other materials, financial and human resources), organisational culture and autonomy, marketing and promotion, co-operation and networking, and legislation. While most of these issues may affect the whole of the library service, they may influence decisively the fulfilment of the educational roles of public libraries

The location, size and quality of the library buildings are important factors for the social image of the library and in its capacity of attracting users (Greenhalgh & Worpole, 1995; Kerslake & Kinnell, 1998), and may influence its capacity of supporting education.

Research has demonstrated that the library support to education requires a number of trained staff, with skills in areas such as advice, support and guidance, and ICT (Brophy, Allred & Allred, 1996; Clwyd County Council, 1996). Furthermore, librarians

need to be aware of developments in the field of education and about the specific needs of adult learners. While the number of staff in Portuguese public libraries has been growing, its number is still low when compared to other European countries (LibEcon, 2000). The constant shrinking of public funding, during the 1980's and 1990's (Comedia, 1993; Aslib, 1995), originated financial constraints and a general decline of the public library service in the UK. In Portugal, in spite of the developments occurred since 1987, the investment in public libraries is still among the lowest in Europe (LibEcon, 2000).

The fact that public libraries are governed by local authorities makes them especially vulnerable to the management structures and the prevalent culture of the public sector. A study by Comedia (1993: 62) raised "the question of the organisational status of the library and whether being tightly enclosed within the local authorities structures is the best way of maximising its potential". The performance of public libraries may be decisively affected by factors such as the bureaucratic environment that pervades most of the public sector in Portugal, the weight of existing legislation, codes, procedures and management styles. These are particularly important to their capacity to meet the educational needs of users.

The literature on public libraries suggests that, as a rule, they have not paid much consideration to the use of a marketing approach to management (Comedia, 1993; Aslib, 1995; Linley & Usherwood, 1998). This contrasts with the acknowledgement by many authors of the importance of marketing to non-profit organisations (Kotler & Andreasen, 1991) and to libraries in particular (De Sáez, 1993; Kinnell, 1996a). Furthermore, as suggested by the Aslib review (1995:271) a limited conception of marketing is prevalent amongst library managers, who tend to see it "as primarily advertising rather than a total marketing approach..."

The importance of co-operation for public libraries is well documented, as a means of obtaining additional resources and of sharing risk (Comedia, 1993). This need for co-operation is still more apparent when considering the educational roles. The most evident partners are schools and the educational departments of local authorities, as well as other institutions such as associations, trade unions, parishes, prisons,

hospitals, and homes for elderly people. Some authors stress the importance of public libraries and schools being key partners, with apparent positive outcomes for both institutions (Eyre, 1996, Matarasso, 1998a, Denham, 2000). The support of the public library to schools may take several shapes, including support to the curriculum and reading promotion (Greenhalgh & Worpole), support to school libraries (Herring, 1988; Creaser, 1999) and homework centers (Train et. al., 2000). The collaboration of public libraries and the educational departments of local authorities does not appear to work as well as with the schools (Train et. al., 2000), due to a number of reasons, including the structure of local authorities (Aslib, 1995).

Legislation on public libraries in Europe became an issue of growing importance during the last decade (Vitiello, 2000). Both the Public Libraries Manifesto (UNESCO, 1994) and the IFLA Guidelines (IFLA, 2000) raised the issue, and recommend that public libraries should be supported by state or regional legislation. Considering the political context of cuts in public spending, several reasons may recommend its existence, including preventing charges, guaranteeing standards, avoiding financial cuts, and setting state support (Thomas, 1997).

## **1.5. Overview of the report**

Considering that the English readers of this study will probably not be familiar with the present situation of public libraries in Portugal, it was considered that a short overview of this topic would be necessary. This is provided in chapter two of this report, which presents an historical perspective of the changes taking place in that country, and briefly addresses their social impact, the constraints threatening them and some possible future developments.

Chapter 3 deals with the methodology employed in this study. After discussing the use of qualitative studies in library and information science, the chapter presents the instruments and processes used for data collection and analysis. These followed a grounded theory approach and used ATLAS.ti, a qualitative data analysis software.



Some ethical considerations are also briefly discussed as well as the validity of the findings of this research.

Chapter 4 identifies the educational needs of several groups of users that may be met by public libraries. The groups considered were children and young people, higher education students and adult learners, and each one of these groups has specific requirements. The chapter also discusses the specific social, economic and educational conditions of the country that may make these needs more obvious.

After discussing several conceptions of literacy as well as its individual and social relevance, chapter 5 addresses the views of Portuguese librarians and elected members on the different ways in which public libraries may support it. The issues discussed are the provision of books and materials, the support given to information and computer literacy, and the promotion of literacy programmes.

In chapter 6, the views of the respondents on the roles of public libraries in lifelong learning are discussed. After a discussion of the concepts of lifelong learning, this chapter goes on to differentiate between rhetoric and realities in this field in the Portuguese context, establishing also some distinctions with international perspectives. A discussion on the reasons underpinning the Portuguese perspectives concludes the chapter.

Chapter 7 considers the roles of Portuguese public libraries in supporting formal education, in sections dealing with several aspects of this support. These include the support given to the curriculum and reading promotion, to school libraries, study rooms and homework, and to teachers and higher education students. The chapter goes on to conclude with a discussion on the factors that may affect the views of the respondents on this issue.

The different ways in which public libraries may help to overcome barriers to education, such as distance, poverty or illness, are addressed in Chapter 8. The ways in which public libraries may help people to learn about themselves and their communities, and the library as a cultural meeting point are also discussed in this chapter. It concludes with a discussion on the reasons for the views held on this issue by Portuguese elected members and librarians.

The managerial issues that may affect the perceptions of the respondents on the roles of libraries on education as well as the actual possibility of the libraries fulfilling these roles are discussed in chapter 9. The issues considered are the shortage of resources, especially human resources, the lack of legislation and the prevalence of a centralised and bureaucratic organisational culture in local authorities. Alongside these problems, uneven levels of co-operation and networking and of marketing and promotion emerge in this study.

The last chapter reviews the themes approached in this report and discusses the general factors influencing the perceptions of the respondents on the educational roles. It concludes by suggesting a set of recommendations on measures that might help public libraries to fulfil their potential in supporting education, and some issues raised by this study that would require clarification by being the subject of further research.

## **1.5. Scope of the thesis**

This study sought to increase the knowledge about the educational roles of public libraries in Portugal. The views of elected members and librarians were considered of crucial importance for the future of public libraries, as they are key elements in the decision making process and thus likely to influence decisively the present and future roles of these institutions. Taking this into account, it was decided that this study would concentrate in obtaining their perceptions of the educational roles.

Other possible informants, such as library users, school librarians and teachers were also considered, but it was decided to focus the research on politicians and librarians due to a number of reasons. The first reason was stated above: these were considered as key informants and therefore crucial in the decision making process on the library service. Secondly, due to the great number of educational roles identified, a choice had to be made between addressing one role in favour of others or addressing all the roles according to a particular perspective. It was decided to choose this second option since using a variety of informants could lead to a loss or decrease of focus. Thirdly there was a pragmatic reason: it was

considered that interviewing all the stakeholders in this process would require considerably more resources than those available for this research. Indeed, it would require a team of researchers, several methods for data collection, and financial resources that were not available.

Finally, another limitation of scope results from the inductive stance of the methodology chosen. Some important themes, such as educational information, collection management, and advice and guidance, were identified in the literature. However, these were not developed by this thesis or were just briefly mentioned, simply because they did not emerge from the data. Furthermore, it was considered that other roles, such as the economic roles, important as they are, do not have a direct educational impact.

## Chapter 2

# PUBLIC LIBRARIES IN PORTUGAL - AN OVERVIEW

*I saw the story-telling corners, I saw areas where kids can play, joyful, well equipped and full of fresh air, I saw young people with phones in their ears enjoying their favourite music, I saw anonymous people handling books...*

(Carvalho, 1997)

### 2.1. Introduction

The aim of this chapter is to introduce the changes that have taken place in public libraries in Portugal during the last two decades. This overview provides background historical information, which is important for understanding the present educational roles of public libraries in the country, and the way they are perceived by librarians and elected members.

It may be argued that for most of the 20<sup>th</sup> Century Portugal did not have a public library system. Although some libraries would use the title of being public they were far from what was the common practise in other countries of Europe and elsewhere in the world.

The 1980's witnessed dramatic changes in this panorama, with the launching of a national program for public libraries, seen as a major force in the effort for modernisation of the country, for democracy and social inclusion, for education and culture.

## **2.2. Libraries lost in time**

During a seminar run by Jean Tabet, a French librarian, in February 1983, a Manifesto of Portuguese public librarians was discussed and approved (*A leitura pública em Portugal: Manifesto*, 1983). It presented a dramatic diagnosis of the existing situation and indicated what was necessary for the future of public libraries in the country.

The Manifesto stated:

"Libraries, almost always located in ancient, cramped and comfortless buildings, are either considered solemn places where only few erudite are allowed or merely reading rooms used by secondary school pupils.

"Free access to the stacks is rare and libraries currently providing home lending are the exception.

"Budgets for acquisitions are insignificant, and there is no policy for updating stocks.

"The libraries unawareness in relation to the needs of daily life of the communities that they serve or should serve is notorious.

"Promotion activities take place only on a few commemorative dates, usually with no local relevance, and are always too elitist or erudite, away from the real interests of the community.

"In brief, we do not have a real public library system but an ensemble of dead institutions, without any kind of relationship with each other or with the environment."

This bleak panorama is widely confirmed by other sources (Parker, 1986; Nunes, Portilheiro, & Cabral, 1986).

However, Portugal has had legislation for public libraries since 1870. In that year, addressing the King, Parliament demanded:

"Sir: the part of the population that has already won the battle of learning how to read, is thirsty for more, and it is necessary that the public administration, in alliance with the action of the municipal power and the private initiative, mitigates that thirst.

"Industries are advancing, progress is fostered by everybody, a national common understanding has to be developed, work needs to be improved, political institutions should be understood and appreciated by everyone.

It was to fulfil these pressing needs that popular libraries were invented and they are nowadays understandably one of the most blessed institutions among cultivated nations."

In spite of this early and inspired start Portugal has not had a strong public library movement compared to the United Kingdom. As is suggested in the quoted Manifesto and by other authors (Jenks, 1976; Jones, 1983; Tsupal, 1982), up to 1987, public libraries, where they existed, tended to be conservationist, aiming mainly to keep books rather than make them available for the general public, often closely connected or mixed with historical archives.

This situation is better understood if one considers that Portugal was ruled by a conservative, autocratic regime for nearly half a century (1926-1974). Some authors consider this regime as fascist (Medina, 1996). Public libraries have been considered essential instruments for democracy and some authors underline the roles of public libraries in promoting democratic access to information and intellectual freedom (Usherwood, 1989). In 1974 a revolution put an end to that dictatorial regime and Portugal joined other western European countries with democratic institutions.

As Nunes (1996:29) suggests "when, in 1926, dictatorship starts its rule in Portugal, the role played by public libraries was already of little importance; this situation would only become worse in the next decades".

One exception has to be pointed out. A private organisation, Fundação Calouste Gulbenkian, has since 1958 provided a lending service through a network of small libraries and mobile libraries. In 1972 this service operated 166 libraries (144, in 1997) and 60 mobile libraries (32 in 1995), lending mainly fiction books (Freitas, 1998).

## *The next stage*

### **2.3. Seeds of change**

The 1983 seminar and Manifesto, together with other transformations, led to an important rise in awareness in the profession, due in part to growing contacts with other European countries, and at some political levels (Cabral & Real, 1982). Nunes, Portilheiro & Cabral (1986) give an informed report of this movement. In this same year of 1983, BAD, the Portuguese Library Association, founded only in 1973, set up a working party with the purpose of fostering public libraries.



In 1985 new courses for librarians were established in three Faculties of Arts in Lisbon, Oporto and Coimbra. Although much criticised from the outset, they were an important step in library studies in Portugal. As a matter of fact they were the first courses in library studies as before that courses (existing only in Coimbra) were for library and archive studies. The new courses introduced matters such as management and information technology, alongside the traditional subjects of librarianship.

However, it was not until 1986 that the Secretary of State of Culture officially appointed a working party to study the situation and present a report including guidelines for the development of a public library system. This working party was given three months to produce the report, which it actually did. It is now an important historical document.

### **2.3.1. The 1986 Report**

The report produced by this working party (Moura, 1986) has two main chapters: one investigates the situation of public libraries in Portugal (then designated as “libraries of public reading”), the other presents “plan and action proposals”. It confirms the state of public libraries as it had been indicated in the 1983 Manifesto and adopts a set of “operational concepts”, very much in line with the ideas presented in the 1972 UNESCO Public Libraries Manifesto, which is widely quoted.

The report proposes “the creation of a libraries network”, based on the local authorities (municipalities) with the creation of branches when necessary, and financed by public money. Initially three kinds of libraries were defined according to the population: BM2 for municipalities with more than 20.000 residents, BM1 for municipalities with less than 20.000 and more than 10.000 and BMD for special cases of very small municipalities. In 1989 some adjustments were made to these standards abandoning the BMD type and introducing a new one, BM3, for municipalities with more than 50.000 residents. In addition, special standards were established for the large towns such as Lisbon, Porto, Braga and Coimbra.

The report gives clear guidelines for the size of each type of library, staffing, stocks and operation procedures. All these libraries should have an entrance hall, a space

for adults and a separate space for children with a story telling area, an audio-visual section, an auditorium and exhibition hall, as well as a space for internal services and storage. The operation procedures emphasise the open access to the stacks, the lending services, and the fact that the library should be open to the community, providing services and promoting them. A specified number of trained staff (as indicated in Table 1) is required for each type of library and the need for a professional librarian to be in charge is clearly indicated.

An important piece of legislation introduced in 1991 (Dec-Lei Nº 247/91, 10 Julho) established the requirements for library staff, defining two levels of professional staff: librarians, with the requirement of post-graduate qualifications, and assistant librarians. These should have nine years of compulsory school plus a course of three years with a strong component of library studies and a period of on site training. After finishing this course, the students are at the entrance level for University. The assistant librarians are known by the acronym TPBD (Técnicos Profissionais de Biblioteca e Documentação) and the course is available in certain technical schools throughout the country.

Although considering that each local authority "should have the responsibility over its own library", the report recommends the setting up of a central body of the Secretary of State of Culture in order to develop "a national policy for public libraries" and to "plan and direct the State intervention in the sector".

The Act of February 1987 transformed the IPL (Instituto Português do Livro, Portuguese Institute of the Book) into the IPLL (Portuguese Institute for Books and Reading), with the specific competence to "plan and execute the national policy of public reading" which in the Portuguese context meant public libraries.

Another important Act was passed in 1987 permitting the IPLL to enter into contracts with local authorities, in line with the recommendations of the report of 1986, and to support the training of staff. These contracts mean that the central government finances the new libraries with 50% of the cost of construction work, furniture and equipment and an initial stock of information resources, provided that the local authority fulfils a certain number of requirements. In line with the initial report, these requirements have been updated and the last version (PORTUGAL,



IPLB, 1997) includes the standards presented in Table 1.

**TABLE 1**  
**Standards for public libraries in Portugal**

	Population	Area Sq. metres	Computers	Initial collection		Yearly renewal		Staff		
				Books	AV/MM	Books	AV/MM	Libr.	TPBD	Total
BM1	<20.000	913	17	14.000	1.700	1.500	200	1	4	10
BM2	20.000- 50.000	1.717	25	34.000	3.000	3.000	400	2	8	18
BM3	>50.000	2.451	30	47.000	4.500	4.000	500	3	12	26

Source: Instituto Português do Livro e das Bibliotecas

## 2.4. A fast changing scenario

In twelve years the panorama of public libraries has changed fundamentally. Local authorities responded to the programme enthusiastically, and in 1987, 178 out of a total of 275 municipalities in the mainland applied for the bid, in order to build or renew a library. From these, 51 were finally selected and the construction work started in 1988.

Since then, every year saw the inauguration of one or several new libraries, as shown in Table 2.

**TABLE 2**  
**Public libraries inaugurated in Portugal (per year)**

1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	Total
1	4	2	9	13	13	3	10	4	16	2	3	80

The public library movement is evolving quickly, and the number of local authorities willing to build a new library continues to increase. In 1999, 166 municipalities, that is more than 50%, had signed contracts with the Ministry of Culture. Furthermore, the Ministry of Culture announced in 1998 that 20 new municipalities would be supported every year. This means, if accomplished, that by 2003 all the municipalities in the mainland will have a public library included in the National Network ("Revolução Cultural", 1998).

Although these libraries are not all exactly equal, they follow a pattern and, according to the IPLB guidelines, all have a certain number of common spaces, as listed by Gordo, Pinto & Vaz (1994: 82):

"Adults section, with free access to the stacks, and areas for the reading of periodicals, and individual reading or reading in groups;

"Children section, also with free access to the stacks, where spaces are divided according to different ages, that is with an area for toddlers, including a special room for storytelling, and an area where youngsters can search for information, for instance for their studies programme;

"Audio-visual section, for hearing, viewing, and also for lending of audio-visual materials

"Multipurpose room for diverse cultural activities, such as exhibitions, conferences, meetings with authors, etc."

In the beginning of the Program, Information and Communication Technology was only vaguely considered but public librarians soon found that this is an essential matter. This issue was absent in the first programmes but is now a component as may be seen in Table 1.

Although it has to be said that Portuguese public libraries still have a long way to go in the use of ICT, some of them have already a valuable experience in the automation of housekeeping routines and offer online public access to the catalogue. Much of this work is presently being carried out by RILP (Public Libraries Computers Network). This is a partnership, which was started in 1991, consists of the IPLB and some municipalities with the purpose of purchasing and managing a computer network for public libraries. In the first stage it comprised nine municipalities; seven joined at the second stage. IPLB, via RILP, finances the

computerisation by 50%, and in addition supports training and maintenance of the systems (Machado, 1994; Patrão, 1999).

Nevertheless, some of the libraries, though they have not yet joined the RILP, are a step ahead and also store and deliver information in CD-ROM's and allow access online to databases, namely using the Internet. A trend has developed to have computers available for the use of customers, and courses in the basic use of computers are offered free of charge.

All these libraries are providing the basic services of public libraries: lending books and audio-visual materials for adults and children, reference and information, cultural and promotional services; the facilities are used by other services of the local authority and organisations of the local community for activities (for meetings, exhibitions, etc.)

Furthermore some of these libraries have specialised in the development of certain services. Local researchers and secondary school students heavily use some good local studies collections. By doing this they play an important role in preserving local heritage. Other libraries have specially developed IT based services, providing access to computers, including the Internet. Community and business information, as well as open learning are other fields of service in which some public libraries are engaged.

## **2.5. A profound social impact**

The quality and the impact of these libraries are often subject of very favourable comments. Local and national public opinion is becoming aware that public libraries are changing in Portugal, even if sometimes they do not completely understand the significance of this change, or if, in the beginning they do not believe in what they see. The ancient paradigm is still present in the minds of some people and takes time to go away.

An illustrative example is given by Francisco José Viegas, a writer and director of the most important review on books published in Portugal. He wrote an article

criticising public libraries, as he knew them: old buildings, no good books, poor service. Some librarians replied that he didn't know what was going on and suggested that he should do a tour and visit the new libraries around the country, which he actually did. He was surprised by what he saw and produced a touching report praising both the work that was being done and the public librarians (Viegas, 1994).

Another major author of Portuguese fiction, Mário de Carvalho (1997) gave his testimony in an article where he stated that Portuguese libraries, that he had seen in a third world state are now ascending to first world status.

"I saw the story-telling corners, I saw areas where kids can play, joyful, well equipped and full of fresh air, I saw young people with phones in their ears enjoying their favourite music, I saw anonymous people handling books, moving them from their places, twisting them, I saw exhibition halls being visited, I saw audiences interested in what a writer might have to say. And I was specially impressed by the dynamism, the open minds, the profound cultural and civic sense of those who work in these libraries."

This kind of article is frequent in the media and it indicates that public opinion is shifting to an awareness of the importance of the public library service. They have been published not only in the professional or cultural but also in the national press. Examples of these are Sepúlveda (1991) and Martins (1995). Radio and television broadcasters have also given a good deal of attention to the public library movement.

In 1997 the Ministry of Science and Technology published a report entitled "Green Book for the Information Society in Portugal" (PORTUGAL. Ministerio da Ciência e da Tecnologia, 1997). This report includes a chapter dedicated to the "Development of Digital Libraries", where the social importance of public libraries is clearly acknowledged.

"In Portugal, where in the majority of homes, and even in many schools, books are scarce and the computer is not yet an easily accessible tool, public libraries can and must be the open door to the new world of digital and multimedia information, the access point to cyberspace to those who either for socio-economic and/or cultural reasons have not in principle means to do it at home."

Another chapter of this report "Democracy in the information society", which

discusses "access to the Information Society" suggests that public libraries have an important role in fighting inequity of access.

The present research indicates that most librarians and elected members are well aware of the roles played by public libraries in strengthening democracy and fighting inequity. One of the respondents, stated:

*Because they make available to the public a set of facilities, expensive facilities, not accessible to everyone, public libraries democratise the access to those cultural goods, to those new media. I think this is also an important role.*

(Librarian, medium sized town, South of the country)

The work that is being carried out to promote literature and reading is one of the aspects that has drawn most public attention. This is much more relevant when one considers that Portugal has a low level of literacy and reading habits are feeble, as shall be discussed in the next chapter (Benavente, 1996).

Most of these libraries have regular programs of promotion in close co-operation with schools. A survey of services for children in public libraries (Figueiredo & Calixto, 1998) shows that 97% of these libraries co-operate with schools and 91% have special lending conditions for schools. Story telling, book talks, guided tours, workshops, meetings with authors, book fairs, reading clubs, exhibitions are all very frequent in these libraries. Other activities include radio programs, theatre, puppets, debates, contests and libraries in the garden or on the beach.

But the promotional and cultural activities are not aimed only at children and young people. Adults are also considered in these activities by meetings with authors and famous people from such diverse areas as music, medicine, football or cooking.

In a recent interview, a major publisher (Coelho, 1998) stated:

*"It has been extraordinary because all these libraries have promoted initiatives with a strong impact. On the other hand, the idea that remains is that these libraries are very lively: they have nothing to do with the libraries of the past."*

In line with these developments, two regional associations were born: BIBLIOMEDIA, in the North of the country, founded in 1990, and LIBERPOLIS, in



the Metropolitan Area of Lisbon, founded in 1994. Their common aim is to promote public libraries, foster co-operation, and provide training opportunities for public library staff. The Association of Municipalities of the Region of Setúbal has a permanent working party on public libraries, which published a guide-book on the libraries of the Region, and every other year organises a Conference that has increasingly gained international status. Proceedings of these conferences have been published (Mota, 1997). Every year IPLB organises a National Meeting of public librarians.

## **2.6. Constraints and threats**

Having depicted such a bright image of public libraries in Portugal, it has to be said that the profession is aware of the constraints and threats impinging on present and future developments.

A report published by IPLB (Moura, 1996) assessing the collections of public libraries, identified that, considering the figures for 1994, stocks were still well below the IPLB guidelines. This was confirmed in a survey (Figueiredo & Calixto, 1998: 68) that concluded that, as far as children's libraries are concerned, "a great part of the libraries, in spite of operating for some years now, have not yet reached what was supposed to be the minimum initial collection". It is no surprise that 66% of the librarians responding to the survey considered the size of the collection insufficient. This same survey also identified other problems, such as the size of the libraries, with 52% of the respondents considering that the space was insufficient.

Some voices have been heard for the need to increase library provision of materials. One author (Nunes, 1998) wrote: "It is necessary that this state of affairs is modified and that IPLB finds ways, defines strategies to make local authorities honour their promises, which is already being done."

Staff, training and research are other major issues commonly discussed amongst professionals and elected members.

Five Universities are presently offering post-graduate courses in library studies for classes of no more than 20 students per year. And only a part of these students are really new librarians, as in many cases they are already working in the field and follow these courses in order to obtain certification. Furthermore, there is also a shortage in other libraries (government, universities, and private organisations) and only a few of these new post-graduates come to work in public libraries. These post-graduate courses are not beyond criticism as mentioned earlier in this chapter, and it has to be said that some essential matters for public librarianship are little more than marginal in these courses. In-service and continuing training are the way public libraries have minimised this problem.

Cases are known of local authorities, especially in some parts of the country, away from large cities, that are willing to recruit librarians for their new public libraries but find nobody to fill the vacancy. Figueiredo & Calixto (1998) found in their survey that 84% of the respondents considered that the number of staff was insufficient, and 62% said that members of staff working in children's sections had no specific training for this purpose. In the present research, both elected members and librarians agreed that this is a major problem for public libraries.

Although there is motivation for continuing education and research among public librarians, it has to be said that the conditions for this research are poor and very much based on wholeheartedness and enthusiasm. Research in library and information studies has not yet been sufficiently considered by state institutions and there is not a policy for this. Publications in this field are rare, ephemeral and meet with a lot of difficulties. BAD, the Portuguese Library Association, has been publishing "Cadernos BAD" for some years but its publications are irregular. LIBERPOLIS is presently publishing "Biblioteca Pública", a 16 pages quarterly newsletter, and "Liberpolis: Revista das Bibliotecas Públicas" ("Liberpolis: Public Libraries Revue") a yearly refereed journal, first published in 1998.

Public librarians have also frequently identified co-operation, or the lack of it, as a problem ("Problema: a (falta de) cooperação", 1998). Although the word network is very often mentioned, it has to be said that most of the libraries actually work by themselves, buy materials by themselves, catalogue by themselves, and do their

promotion work by themselves. Inter-library loans are sporadic. The associations mentioned above are attempts to reverse this situation but individualism is still great among public librarians.

## 2.7. Future developments

In spite of these constraints and threats, there are no reasons to fear for the immediate future of public libraries in Portugal.

The fact that every year new local authorities are eager to join the National Network suggests that the idea of the need for public libraries as an essential service for citizens is widespread and has gained deep roots among elected members. The commitment of the Ministry of Culture that 20 new libraries will be supported every year is also reassuring

The awareness of the social and educational roles of public libraries among elected members, and the idea that the existent libraries are not big enough for the size of the communities they serve, are key conclusions emerging from the present research.

Some municipalities have been opening branch libraries, without financial support from the central government, bringing into practice the idea of a municipal network (Freitas, 1998). Furthermore, in interviews with elected members published in *Biblioteca Pública* (1998) it is suggested that even local authorities with recent large libraries for Portuguese standards are already considering building another one. This idea is also confirmed in the present research.

The fact that two courses on library studies have added to the previous three of the Universities of Lisbon, Porto and Coimbra, and that several technical schools are continuously training paraprofessional staff may mean that the shortage of staff will be overcome in the near future, in spite of the fact that needs are also likely to grow.

Perhaps the most important basis for the optimism on Portuguese public libraries lies in the growing social awareness of their significance and importance. It is up to



the profession to be able to keep demonstrating this and proving its relevance for the future of the communities and of the country.

## **2.8. Summary**

This chapter presents a brief introduction to the evolving situation of public libraries in Portugal.

The situation prior to 1986 is summarised, highlighting the fact that public libraries in this country had a very low standard of service, and it is suggested that this fact is associated with the dictatorial regime that ruled the country for more than 40 years.

Changes which occurred in the 1980's are described featuring mainly the 1986 report, the creation of IPLL (Portuguese Institute for Books and Reading) and the Public Libraries Network. The social impact these libraries are having is briefly analysed, underlining their roles in the promotion of social inclusion, promotion of literature and reading especially amongst children, and lifelong learning.

Some of the impending constraints and threats which could hurt these advances are discussed, mainly the shortage of staff and continuing education, and poor co-operation. It is however suggested that, considering their social relevance, public librarians in Portugal have good reason to be confident, at least in the near future.

## Chapter 3

# METHODOLOGY

*Question: What's the difference between  
students of 1960s and 1990s?  
Answer: Thirty years*

(Dey, 1993 : 15)

### 3.1. Introduction

The main characteristic that should be emphasised in describing the methodology used in this research is clearly spelt out in the often-cited statement of Strauss & Corbin (1990: 23): "One does not begin with a theory, then prove it. Rather one begins with an area of study and what is relevant to that area is allowed to emerge"

For the present research it was decided to make use of a grounded theory approach, the characteristics of which are detailed in the present chapter. All the processes of choosing, designing and applying the devices for the collection of data is discussed, based on the literature and in the experience obtained during the present research. The analysis of data made use of the constant comparative method (Strauss & Corbin, 1990).

Another relevant aspect of the methodology used in the present research was the use of software to record and analyse the data. Advantages and disadvantages about the use of computers to analyse data and build theory were found in the literature, but the concerns raised appear to have been overcome. The experience of choosing and using CAQDAS (Computer Assisted Qualitative Data Analysis Software) was an important outcome and an added value to the present research.

The use of qualitative methods in library and information studies has grown steadily during the last decades (Westbrook, 1994). This does not mean that quantitative approaches have been abandoned, and sometimes both are used in concurrence.

The advantages in using qualitative methods in library and information studies have been widely discussed and while some authors were critical about their use (Davis, 1990), it is presently well established and commonly used by researchers in this field. Some authors have advocated the use of mixed methods (McCracken, 1988), whilst others have argued in favour of theoretical purity (Guba & Lincoln, 1988).

### 3.2. Qualitative research in library and information science

Qualitative methods in Library and Information Studies have developed steadily and continuously during the past few decades. This contrasts with the situation in 1978, when Susan Crawford, reviewing “three decades of user studies, found quantitative methods, specifically survey by questionnaire and structured interview, to be the predominant research paradigm” in this field of studies (Quoted in Mellon, 1990: 136). This panorama changed dramatically during the seventies and eighties. Westbrook (1994: 241) goes even further back stating that “the past 50 years have seen a strong development of the theories and techniques associated with the naturalistic paradigm and qualitative research methods” in information science.

In this shift, library and information studies have not and could not have been isolated from the mainstream of the social sciences. On the contrary, in sociology, anthropology and psychology, there has been a growing and widespread use of qualitative approaches. Bryman & Burgess (1994: 1) suggest that the “pre-eminence and predominance of quantitative methodology has been replaced by an emphasis upon qualitative methodology in British sociology”. Patton (1990), Miles & Huberman (1994) and Robert Bogdan in the Preface to Mellon (1990) suggest that this has also been the case in other parts of the world.

These changes do not mean that qualitative methods have been abandoned in favour of exclusively or tendentiously naturalistic approaches. What has emerged is

a differentiation of paradigms where different approaches are used in different situations or even within the same study.

"Pragmatism" is Patton's advice, in spite of his clear preference for qualitative methods (Patton, 1990: 13-14). He suggests that

"... Qualitative methods permit the evaluator to study select issues in depth and detail. Approaching fieldwork without being constrained by predetermined categories of analysis contributes to the depth, openness, and detail of qualitative inquiry. Quantitative methods, on the other hand, require the use of standardized measures so that the varying perspectives and experiences of people can be fit into a limited number of predetermined response categories to which numbers are assigned."

The use of qualitative methods in library science has been the subject of debate and disagreement. One example of this debate is an editorial of *Library and Information Science Research*. In this text, Davis (1990:327) acknowledged the place of qualitative methods:

"Any attention to research, especially in the professional literature, should be good news. And there is no question that naturalistic inquiry, involving techniques well established in such fields as cultural anthropology, has its place in librarianship."

However, the same author distinctly defends the superiority of quantitative methods:

"Regardless of the field, the bottom line is this: The best hypotheses are general and quantifiable. Qualitative research, which is generally descriptive, may involve no hypothesis at all, meaning that any inferences drawn from the results may have only local validity or none at all.

(...)

"If qualitative research becomes the norm, a soft field will look even softer. Library schools will be thought inferior to other academic units, and they will seem increasingly expendable" (page 328).

### 3.2.1. The use of naturalistic inquiry and grounded theory in library and information studies

The use of qualitative approaches to library and information studies has not only developed but has also been used in diverse situations with various justifications for its use. Mellon (1990) argued that

"naturalistic inquiry is particularly relevant to librarianship. In this age of automation, it is necessary for librarians to keep reminding themselves that

theirs is a profession aimed at bringing information to the people" ( page 3).

A similar point had already been made by Grover and Glazier (1985) who concluded that the method has "considerable merit for use by faculty and students in library and information science professional schools". The sociologist Peter Hall (1990) had also argued that "what has worked so well for anthropology, sociology, organizational studies, and education would seem to augur well for library and information science."

More recently Gorman & Clayton (1997: 31) summarized how qualitative methods can contribute to library and information studies:

- "(1) They are attuned to growing complexity in an information environment that requires flexibility and variability in data analysis;
- (2) They facilitate the use of triangulation to enrich research findings;
- (3) They are responsive to the need for libraries to fulfil their service imperative;
- (4) they are suited to the non-quantitative background of many informational professionals; and
- (5) They fit the social nature of libraries."

Qualitative methods in library and information science have been widely used in Universities as well as in research centers across the United Kingdom. Examples of this are the Centre for Research in Library and Information Management at Manchester Metropolitan University and the Centre for the Public Library and Information in Society at the University of Sheffield. Private consultants, such as Comedia and Aslib have also used qualitative methods widely.

Since the purpose of the present research is to analyse the professional and political perceptions of the educational roles of public libraries in Portugal, the use of a grounded theory approach was considered the most appropriate. As Strauss and Corbin (1990: 19) suggest: "Qualitative methods can be used to uncover and understand what lies behind any phenomenon about which little is yet known." This is precisely the case of the present study.

This research made use of qualitative methods from the outset and owes much to the "constant comparative method" of analyzing data. Strauss & Corbin (1994: 283) define some features of grounded theory that they consider so central to the



methodology that their abandonment would mean a great departure. These are "the grounding of theory upon data through data-theory interplay, the making of constant comparisons, the asking of theoretically oriented questions, theoretical coding, and the development of theory". This thesis has been written within these parameters.

### 3.3. Qualitative methods and grounded theory

An elaborated discussion about qualitative research is outside the scope of the research chapter of a thesis. However some words have to be said in order to present and justify the choice of the particular methodology that was used. The argument is developed later in this chapter when describing the processes of data collection and analysis.

A simple definition is given by Strauss & Corbin (1990: 17): qualitative research is "any kind of research that produces findings not arrived at by means of statistical procedures or other means of quantification."

Actually the concept of qualitative research is quite wide and includes various kinds of methodologies, techniques for data collection and also diverse analytical perspectives. It can be used to refer, among others, to ethnography, case study research, naturalistic inquiry, life history methodology, grounded theory, or narrative inquiry. Twenty-seven types of qualitative research were identified and classified by Tesch (1990).

All these approaches aim at minimising the presuppositions with which one approaches the empirical world, and Lofland & Lofland (1995: 6) express their preferences for the term "naturalistic research".

Some recurrent features of naturalistic research are very clearly presented by Miles & Huberman (1994: 6-7). These include among others:

"Qualitative research is conducted through an intensive and/or prolonged contact with a 'field' or life situation. (...) The researcher's role is to gain a 'holistic' (systemic, encompassing, integrated) overview of the context under study. (...) Relatively little standardized instrumentation is used at the outset. (...) Most analysis is done with words.

"The words can be assembled, subclustered, broken into segments. They can be organized to permit the researcher to contrast, compare, analyze,



and bestow patterns upon them.”

One of the above-mentioned approaches, grounded theory, deserves particular attention, as it was an important focus of the methodological approach used in the present study. Grounded theory encompasses many of the characteristics associated with qualitative research but one particular feature makes it a special analytic tool. It develops a set of procedures to approach data in order to inductively create theory about a phenomenon (Strauss & Corbin, 1990).

The core of these techniques is the coding process by which categories and subcategories are identified, so that, eventually, all units of data can be categorized according to these codes. According to Strauss (1987) grounded theory

“is not a specific method or technique. Rather, it is a style of doing qualitative analysis that includes a number of distinct features, such as theoretical sampling, and certain methodological guidelines, such as the making of constant comparisons and the use of a coding paradigm, to ensure conceptual development and density” (page 5).

The distinct features of grounded theory may be summarised as follows:

- Theory is grounded in data. "One does not begin with a theory, then prove it. Rather one begins with an area of study and what is relevant to that area is allowed to emerge" (Strauss & Corbin, 1990 : 23);
- The researcher approaches the study trying to avoid presumptions about the subject of the research based on previous knowledge or literature. This is used to increase theoretical sensitivity;
- The collection of data uses flexible devices, that change and evolve during the research;
- The processes of collecting data, analyzing and reporting are not sharply separated and may and do overlap;
- Theoretical sampling, based on "concepts that have proven theoretical relevant to the evolving theory" (Strauss & Corbin, 1990 : 176);
- Analysis is carried out using three types of coding: open coding, axial coding and selective coding. Along with these procedures, constant comparisons are made between categories and their properties;

- The use of a conditional matrix, "an analytic aid, a diagram, useful for considering the wide range of conditions and consequences related to the phenomenon under study" (Strauss & Corbin, 1990 : 158)

### 3.4. Reliability and validity of the findings

There has been much debate about problems of validity, reliability, and accuracy, in other words the scientific character of qualitative methods. However, since the positivist paradigm is refused, and qualitative approaches find their philosophical origins in phenomenology, the scientific character of qualitative methods is to be found elsewhere rather than in representativeness and generalizability of its findings.

Miles & Huberman (1994) suggested a set of standards for the quality of the conclusions. These establish five parameters to analyze the research: (1) objectivity/confirmability; (2) reliability/dependability/auditability; (3) internal validity/authenticity; (4) external validity/transferability/fittingness; and (5) utilization/application/action orientation. For each one of the issues, a set of questions is suggested and from its application a good picture of the quality of the research should emerge. Patton (1990: 460) also considers what he calls "the credibility issue", dedicating one full chapter to enhancing the quality and credibility of qualitative analysis.

The perspective of grounded theory on the evaluation of research reflects the specificity of its particular procedures and epistemological assumptions. Strauss & Corbin (1990 : 252) present guidelines for the evaluation of theory regarding three parameters: (1) data (validity, reliability and credibility); (2) the research process and (3) the empirical grounds of findings, suggesting a set of criterions in question form for the evaluation of the research.

Some qualitative researchers believe that reliability and validity are exclusive of quantitative methods and are simply inappropriate criteria to judge qualitative research (Gorman & Clayton, 1997). Rubin & Rubin (1995:85) for example believe that "most indicators of validity and reliability do not fit qualitative research. Trying to

apply these indicators to qualitative work distracts more than it clarifies." They propose that qualitative research should be evaluated on grounds of transparency, consistency, and communicability, but indeed some of these concepts are partially coincident with that of reliability.

Kirk & Miller (1986: 19) defined reliability as "the extent to which a measurement procedure yields the same answer however and whenever it is carried out", and considered three kinds of reliability: quixotic, diachronic and synchronic. According to Gorman & Clayton (1997), several techniques may be used to ensure reliability, including consistent note taking and drawing upon other research, both of which were systematically used throughout this study.

The present research claims to be reliable in the context of its universe and context, i. e. it applies to a particular country in a specific period of time. This should be especially stressed, due to the constant changes affecting public libraries throughout the world, including Portugal. The research process followed accepted methods and techniques, which are described in detail in the next section of this chapter, conforming to the recommendation of Strauss & Corbin (1990: 252) that the "reader should be able to make judgements about some of the components of the research process...". The findings of this research are grounded on the data obtained in the interviews analysed and compared with other studies and reports published in Portugal (very few), and in other European Countries.

Validity is defined by Kirk & Miller (1986) as the extent to which a research gives the correct answer to the questions it has posed. Three kinds of validity may be considered: face validity, criterion validity and construct validity. One of the ways to ensure validity is triangulation that, according to Gorman & Clayton (1997) may be equated with criterion validity. Patton (1990) considered four kinds of triangulation regarding the methods, the sources, the analysts and the theoretical perspective.

Throughout this study some of these kinds of triangulation were used in various circumstances. While its dominant paradigm is qualitative, some quantitative measurement has also been involved. The most relevant data were obtained via in-depth interviews, but other methods were also consistently used, and indeed the

first data to be obtained was originated in a questionnaire, which provided a first broad picture of the field to be researched, and helped the selection of the sample of authorities. During the process of interviewing, observation was also used and documentary evidence was obtained. In the end, all these methods contributed to obtain diverse kinds of data, which helped to inform and clarify the analysis process.

Strauss & Corbin (1990: 52) suggest that the literature "can be used as supplementary validation". Following one of the basic principles of grounded theory, this study approached fieldwork and the analysis process with as little presuppositions as possible. Throughout the study, the conclusions emerged primarily from the data and only then were checked with the findings of other research in this field. This was used to confirm or deny hypotheses but never took priority over the findings emerging from the data. The extensive use of previous writings such as research reports and studies, including previous research by the author of this report, adds to the validity of the present study.

### 3.5. Data collection and analysis

The design of a qualitative research poses special problems since it has to be accepted and approved by research committees and funding organizations, as stressed by Patton (1990):

"Qualitative inquiry designs cannot be completely specified in advance of fieldwork. While the design will specify an initial focus, plans for observations and interviews, and primary questions to be explored, the naturalistic and inductive nature of the inquiry makes it both impossible and inappropriate to specify operational variables, state testable hypotheses, and finalize either instrumentation or sampling schemes. A qualitative design unfolds as fieldwork unfolds." (page 61)

The reason for researching the perceptions of Portuguese librarians and politicians of the educational roles of public libraries is - as always in science - to increase the amount of knowledge available, illuminating something that is slightly perceived but yet obscure.

This study used methods accepted in social science and followed a set of steps, including a literature review, a survey by questionnaire, in-depth interviews, and data analysis using Computer Assisted Qualitative Data Analysis Software (CAQDAS).

### 3.5.1. Reviewing the literature

Reviewing the literature was actually a preliminary step started even before formally starting the study. Naturalistic inquiry assumes that fieldwork is started without presuppositions about what is being researched and so previous information has to be handled with care and, should not bias fieldwork (Mellon, 1990).

However several circumstances made a preliminary literature search necessary. These circumstances include the academic framework in which the study is carried out and the need to increase what Strauss & Corbin (1990: 42) call theoretical sensitivity. This is defined as "the attribute of having insight, the ability to give meaning to data, the capacity to understand, and the capability to separate the pertinent from that which isn't". Literature is one of the sources they recommend to increase this sensitivity, the others being professional and personal experience and the analytic process itself. Also desk research had to be undertaken in order to start the process of clarifying the subject. Basically to start asking questions it would be necessary to develop previous knowledge about the issues of the research.

Patton (1990) discusses literature review in a very sensible and pragmatic way:

"Review of relevant literature can also help focus the study. It is helpful to find out how others have approached similar concerns. Yet, reviewing the literature can present a quandary in qualitative inquiry because it may bias the researcher's thinking and reduce openness to whatever emerges in the field. Thus a literature review may not take place until after data collection. Alternatively, the literature review may go on simultaneously with fieldwork, permitting a creative interplay among the process of data collection, literature review, and researcher introspection. There are trade-offs, advantages, and disadvantages related to when to review the literature: before, during, or after fieldwork - or on a continual basis throughout the study". (page 163)

The option taken was precisely to do periodical searches, what in the end proved to be a good choice. In fact, since this field of study, as many others, is evolving fast, relevant literature was published during the period of research.



The literature search made use of several resources. Among these are the catalogue of the Library of the University of Sheffield and the British Library and Information Science Service (BLISS). The Portuguese National Library was also used, as was the Documentation Center of the Ministry of Education.

Electronic sources were also used. These include the databases ERIC and LISA on CD-ROM, as well as the Internet. This proved to be very useful, as more and more documents are becoming available everyday. Search engines, such as Altavista and Google, and directories, such as The Librarians Index to The Internet and The Internet Public Library, provided access to a number of sites with relevant information.

The literature search went in two different directions: one followed the methodological issues, whilst the other dealt with the educational roles of public libraries in different countries.

Considering the great number of publications that could eventually provide important information on this topic, choices had to be made in order to determine those that were of crucial relevance. These choices were made based on the relevance and keyword match and, when available, by scanning the abstracts. Another criteria was the year of publication. As a rule, preference was given to more recent items, and most of the literature used for this study was published during the late 1980's and 1990's. Language was another criteria, and with only a few exceptions, most of the documents used were either in English or in Portuguese. The geographic origin of the works was equally taken into account, and preference was given to documents dealing with or encompassing the Portuguese reality. As mentioned in section 1.3 of this study, research in library and information studies is very scarce in Portugal. It was necessary to enlarge the scope of the search to studies at European level, as many of these have references to Portugal. Naturally, and since this study was carried out in a British University, the access to British literature was easier, and this originated a much heavier use of British bibliographic sources.

This report does not include a separate literature review as it was decided that it would add to clarity and density of analysis if the ideas from literature were



presented and discussed in the context of the major themes emerging from the data. Hofmann (1995) suggested:

"It is very clear to me that there could be excellent qualitative dissertations that have no 'literature review/theory section'. It is possible to take the results of the textual analyses and as you discuss their meaning you would include the relevant literature in the discussion rather than as a separate literature chapter."

This option follows the inductive nature of the methodological approach used in the present research, in which the conceptual context is constructed as the analysis develops, and is not pre-conceived as the inclusion of a previous separate chapter might suggest. Maxwell (1996) discusses the concept of literature review itself, arguing that it can be "a dangerously misleading term" (page 26).

### 3.5.2. Sampling

The most valuable data were obtained via in-depth semi-structured interviews with librarians and elected members in fifteen selected municipalities. Three of these municipalities were kept in reserve in case some problem arose with the previously selected.

The approach to sampling in naturalistic inquiry is different from that used when dealing with numeric data. Researchers in the field have used theoretical sampling (Mellon, 1990; Strauss & Corbin, 1990), purposeful sampling (Patton, 1990), and selective sampling (Schatzamn & Strauss, 1973). The aim of purposeful sampling is "to select information-rich cases whose study will illuminate the questions under study" (Patton, 1990: 169).

In order to select the municipalities to be included in the study, a questionnaire was sent to the chief librarians in the 67 libraries then opened under the IPLB framework. A pre-paid addressed envelope was included for the respondents send their answers. The reason why only the municipalities included in the public libraries network were considered was that the other municipalities either would not have a public library at all or were running libraries with very low standards as far as the public library service is concerned.

This questionnaire used a Likert scale to obtain the opinions of the librarians on the educational roles of the public libraries and also asked what a particular library is actually delivering. It also asked if respondents would be available for further detailed interviews. This preliminary questionnaire also served as a first dissemination of the research in the public library community in Portugal. (APPENDIX A)

The questionnaire was developed using previous desk research that had highlighted the main issues. The main purpose of the questionnaire was to gather information to inform the selection of the municipalities where in-depth interviews would take place. It was expected that it would provide a broad view of the present perceptions of Portuguese librarians on the educational roles of public libraries.

From the 67 questionnaires issued 39 were answered before the deadline; in the end 43 responses were considered. This is a good response rate of 64% and all the respondents were willing to participate in the interview process. Some written comments highlighted the need for this research, whilst others suggested the alteration of the way some roles were phrased.

The selection of the municipalities was made on the basis of maximum variation (Patton, 1990: 172): large and small communities, rural and urban, developed and less developed services, and political allegiance. The 43 respondents to the questionnaire were considered. They were divided in three groups according to the answers given in the questionnaire.

Five of these municipalities were ruled by the Socialist Party, five by the Social Democratic Party, four by CDU (Communist Party) and one by CDS (Christian Democratic Party). This followed the proportionality of the ruling of the parties in local government.

The variation in size and rural / urban areas was also secured as seven of these libraries are BM1 (small town), seven are BM2 (medium size town), and one is BM3 (large size town). Actually, only two BM3 had answered the questionnaire.

Fifteen municipalities were chosen after the questionnaire. In each of these municipalities four people were interviewed:

- The chief librarian (many Portuguese public libraries actually have only one librarian);
- Another member of the staff, a deputy librarian or a library assistant;
- One elected member of the municipal council who has the responsibility for the library; and
- Another elected member, belonging to the opposition party.

### 3.5.3. Interviewing

Collecting data lies at the core of any research project. Qualitative researchers use several techniques: observations, interviews, group discussions and historical studies (Gorman & Clayton, 1997). Other authors use slightly different terminology. Slater (1990) considers questionnaires, interviews and group discussions, whilst Patton (1990) uses the terms observation, interviews, and documentation, considering focus groups as a variation of interviews. Going into detail through each one of these techniques is beyond the aim of this report and it will focus on the main technique used in this research which was interview.

#### **A) Advantages and disadvantages of interviews**

Much discussion was found in the literature on the use of interviews, their advantages and disadvantages, their practicalities and even their dangers. However there is a general agreement that it is a major research tool for qualitative research. McCracken (1988: 9) considers that "for certain descriptive and analytic purposes, no instrument of inquiry is more revealing". This is even more true when the aim is "to study the subjective view participants hold of a particular situation or event." (Mellon, 1990 : 47)

Gorman & Clayton (1997) stress two advantages in the use of interviews:

"First, the person being interviewed is encouraged, by the use of open-ended questions or by non-directive listening to highlight self-perceived issues or relationships of importance. (...) Second, dialogue between researcher and subject allows the interaction to move in new and perhaps unexpected directions, thereby adding both depth and breadth to one's understanding of the issues involved." (page 45)

Some drawbacks have also to be considered. Some are of practical order: interviewing (and analyzing) is time consuming and can be much more expensive than other methods, for instance focus groups. Other arguments are more epistemological: data originated in interviews risk to be uncritical, too personal and especially open to bias. McCracken (1988: 28) warns "...for all its perspicuity in certain matters, it is a perfectly unreliable, even misleading, guide in other respects." Following the same line, Patton (1990) considers interviews a limited source of data because

"... participants and staff can only report their perceptions of and perspectives on what has happened. Those perspectives and perceptions are subject to distortions due to personal bias, anger, anxiety, politics, and simple lack of awareness. Interview data can be greatly affected by the emotional state of the interviewee at the time the interview takes place. Interview data are also subject to recall error, reactivity of the interviewee to the interviewer, and self-serving responses." (page 245)

### **B) Multiple methods**

In order to get most of the advantages and lower the risks of using the interview as a tool for research, some measures can be taken. One is the use of multiple methods, or triangulation (Patton, 1990: 186) although this will not solve the financial problems.

McCracken (1988: 28) suggests that other methods may add to the reliability of interviews. These include participant observation, focus groups, life histories, case studies, protocols, and the diary method. Moreover he also considers that "the qualitative researcher must also be prepared to take full advantage of quantitative methodologies."

Nevertheless, the use of multiple methods is not beyond criticism. Guba & Lincoln (1988) and Hammersley & Atkinson (1983) have argued that the combination of different methods doesn't necessarily mean more reliability on the findings and campaign against methodological mixing.

"Advocates of methodological purity argue that a single evaluator cannot be both deductive and inductive at the same time; one cannot be testing predetermined hypotheses and still remain open to whatever emerges from open-ended, phenomenological observation." (Patton, 1990: 194)

### ***C) Types of interviews***

Different types of interviews can be considered. Gorman & Clayton (1997:125-126) classify them as "structured or survey interviews" and "unstructured interviews". Patton considers three types: "the informal conversational interview", "the general interview guide approach" and the "standardized open-ended interview". Rubin & Rubin (1995: 5) use the terms "unstructured" and "semi-structured" and consider that "many qualitative interviews have both more structured and less structured parts but vary in the balance between them."

For the present research a semi-structured open-ended interview was used, as it was considered useful to get the opinion of a number of respondents on the same issues.

### ***D) Designing and piloting***

Much care was taken in designing the interview schedule. Patton (1990: 290-298) suggests a framework for the kind of questions an interview may include. Although his framework was not strictly followed, it was used to inform the design of the interview schedule, with the necessary adaptations to the topic and the circumstances of the research. This framework is summarized in Table 3.

Rubin & Rubin (1995: 44) suggest that "As you learn how the interviewees understand their world, you may want to modify what is it you are studying or rethink the pattern of questioning." Hence the need for piloting.

The initial design of the interview was piloted in five different libraries, with three librarians and two elected members, during the second fortnight of November 1997. This was a first and very useful experience that produced some changes in the interview guide and provided some indications of what was to come, and is described in detail in the following pages (sections F), G) and H)).

The piloting of the interview guide suggested that section 3 of the interview (Cases and contexts) needed some alterations, as the interviewees showed some difficulties in understanding the questions and were not very spontaneous with their answers. Some questions were rephrased and prompts were included in those



questions that did not elicit an immediate answer. The roles in section 2 also suffered some minor changes in the Portuguese version, as it became apparent that, especially the elected members, were not very familiar with some of the concepts.

**TABLE 3**  
**Kinds of questions in interviewing**

Experience / Behaviour Questions	About what a person does or has done
Opinion / Values Questions	Aimed at understanding the cognitive and interpretative process of people
Feeling Questions	Aimed at understanding the emotional responses of people to their experiences and thoughts
Knowledge Questions	To find out what factual information the respondent has
Sensory Questions	About what is seen, heard, touched, tasted and smelled
Background / Demographic Questions	Concern the identifying characteristics of the person being interviewed

(After Patton, 1990)

### ***E) The interview schedule***

The final version of the interview schedule was informed by the literature review, the opinions raised by the questionnaire and the five pilot interviews.

The educational roles of libraries are well covered in the literature. The main sources used in this phase were Allred (1979); Bamber (1995); Figueiredo & Sousa (1992); Elkin (1996); Greenhalgh & Worpole (1995); Moura (1986); Moura (1996); Ray (1982); Sturges (1996); Nunes (1996); Usherwood (1989). The reports



*Investing in children*, *National grid for learning* and *Reading the future* were also consulted.

The literature review identified a number of educational roles that were to be an important part of the schedule. These are listed in table 4. The interview schedule had four main sections and a short introduction (section one) where the aims of the interview were presented and the confidentiality of the interview was reassured.

**TABLE 4**

**Educational roles of public libraries**

1. Libraries for children and young people
2. Facilities for the socialisation of youngsters
3. Formal educational services
4. Support to schools mainly via School Library Service
5. Support to University Students
6. Study rooms and homework centers
7. Support to independent learning
8. Support to lifelong learning
9. Support for literacy
10. Support for IT skills
11. User education
12. Development of information skills

Section two was concerned with the educational roles of public libraries. It started with an open-ended question: "What are in your opinion the educational roles of public libraries?" After this, the twelve roles above mentioned were presented to the interviewee, asking for his or her opinion about their importance. A five grades

Lickert scale was used, ranging from "Not at all important" to "Very important", but the most valuable information was expected (and actually obtained) with the question that followed each one of these twelve questions: "Could you tell me why you think that?"

Section three was built using a SWOT approach. The interviewees were encouraged to give their views on the strengths, weaknesses, opportunities and threats to the library service as far as the educational roles earlier discussed were concerned. The pilot indicated the need for a set of prompts where a spontaneous answer might be more difficult to obtain.

Section four was designed to obtain personal data about the respondents, so that the results may be compared with others in this field.

Section five brought the interview to an end, asking if there was anything else the respondents would like to add, and if he or she would like to have more information about the research.

The structure of the interview schedule was carefully prepared in order to make sure that the data obtained were relevant to the study. The actual phrasing of the questions was thoroughly discussed and tested with two main considerations in mind: clarity and neutrality.

#### ***F) Practical matters***

A letter was sent to the prospective interviewees, explaining the aim of the research and asking for an interview. (APPENDIX B). A pre-paid addressed envelope was included.

The process of obtaining the interviews turned out to be more difficult than initially expected. Not because there was a single refusal, on the contrary every respondent was very much available to be interviewed. But, as was discovered later, being interviewed for research purposes was not something that elected members and librarians are very much used to in Portugal. And very few actually answered the letter. That meant that the appointments were obtained only after much telephoning and insisting and explaining. Once the appointment was arranged everything went well and the respondents were usually very sympathetic and helpful.

Two other problems arose with elected members. Their lack of experience in giving this kinds of interviews made some of them assume that the time for the interview would be relatively short (although it was clearly explained in the letter that it could take up to one hour). Many interviews were interrupted several times, by a phone call, somebody coming in the room... or even by other interview with a local radio station.

Portugal had had local elections in December 1997, two weeks before fieldwork was due to start. This caused some problems regarding the availability of potential respondents and delayed the actual starting of the fieldwork by two months. The first interview took place on the 18th March, 1998, and the last one on the 21st September, 1998.

### ***G) Conducting the interview***

The literature on interviews covers a number of practical issues. These include the most adequate time and places to run the interview, the cares of the interviewer, and how to dress for the interview.

Almost all the interviews took place at the respondents' workplace, the library for the library staff and the Town Hall for the elected members. There were a few exceptions in order to accommodate the interviewees.

Mellon (1990) suggests five phases for an interview: introduction, small talk, warm-up questions, body of the interview, and closing. Helpful suggestions are also given for the conduct of the interview. These range from the need to maintain a friendly "open and non-judgmental" atmosphere, encouraging the interviewee and maintain the flow of information, pacing of the questions, body language and probing.

The need to keep a balance between obtrusiveness and unobtrusiveness is stressed by McCracken (1988), who considered that, although it is essential not to lead the respondent or otherwise interfere in his or her discourse, it is also necessary to have some kind of control over the interview. "The question, then is not whether, but how, to impose order or structure on these data" (page 22). Two ways suggested are the use of "prompts" and a well designed questionnaire. Considering these necessities the best use of both was made in the present situation.

Maintaining the control of the interview was not always an easy task. The appropriateness of Patton's remark (1990: 330) that "long winded responses, irrelevant remarks, and digressions in the interview will reduce the amount of time available to focus on critical questions" became very clear. It was not always easy to keep an appropriate balance between the need to let the respondents explain their views and the necessity to keep them focused on the issues. With this purpose everything was done to keep a constant rapport between interviewer and interviewees. This was achieved making the best use of body language, verbal encouragement and eye contact, encouraging them when the flow of conversation was focused on what had been asked, and trying to bring them back to the topic when the conversation threatened to drift away. In a few cases an actual interruption was necessary asking if we could please come back to the point.

#### ***H) Recording and transcribing***

A tape recorder was used and care was taken to keep it as unobtrusive as possible. Tape recording is widely advised by different authors who stress anyway the need to be attentive and take notes of the interview. (Patton, 1990: 348; Rubin & Rubin, 1995: 125). There are some basic measures to be taken as this experience well proved. To have fresh batteries in the tape recorder, to make sure that the level is adequate (too low may not record, too high may make the records indecipherable). Parts of the interview may be lost if one forgets to turn on the tape recorder. This is a field where, although warned in advance one is, only experience really makes one take the necessary measures.

Permission to tape record was asked in advance and all the necessary steps were taken for the interviewees to feel at ease with the recording process, particularly reassuring the confidentiality and anonymity of the interview.

The interviews and transcriptions were carried out in Portuguese as well as the following process of analysis. English was used only when the report was written and then all the necessary translation of quotations and notes was done.

Transcribing the interviews as Gorman and Clayton (1997: 136), warn is "a time-consuming and soul-destroying task". Although some authors consider the



possibility of not transcribing the full interview, the reason for this lays mainly in the financial costs of the transcription. Patton argues that "full transcriptions are the most desirable data to obtain. Transcriptions can be enormously useful in data analysis and later in replications or independent analysis of the data." (1990: 449)

The option taken in this research was to do verbatim transcriptions and for this the use of a transcribing machine was essential. The first couple of transcriptions were done directly from the recorder, but soon it was found that it would be still more time consuming. Anyway the rate of transcription was always between 4 and 6 hours of transcribing to 1 hour of recorded data.

In the future, new technology may provide the researcher with less time consuming methods. Digital recording is already common and in the near future the use of voice recognition software may "soften" these hard tasks. This issue will be approached later in this chapter, when discussing Computer Assisted Qualitative Data Analysis Software (CAQDAS).

Other important lessons were learnt about transcribing. The researcher's experience justifies the advice of Rubin & Rubin (1995):

"Taping encourages you to do several tapes back to back, with the idea that the tapes will keep. But it is better practice to space the interviews, both to allowing you to refresh yourself and to study what was just said..." (page127)

#### **3.5.4. Data analysis**

The data were analyzed using a grounded theory approach, as outlined earlier in this chapter.

At the core of qualitative analysis lies the complex process of coding, one of the major features of grounded theory. "Coding represents the operations by which data are broken down, conceptualized, and put together in new ways" (Strauss & Corbin, 1990: 57). Mellon (1990) compares naturalistic inquiry with librarianship itself and coding to subject heading.

The three basic techniques for analyses suggested by Mellon are codes, memos and diagrams. Codes are labels assigned to pieces of data. Going through the text, new labels are found and a list of terms grows. On the other hand new pieces of data are allocated to codes previously established confirming or negating certain

themes. This first process is called open coding, defined by Strauss & Corbin (1990: 61) as "the process of breaking down, examining, comparing and categorizing data".

Axial coding follows in the process of analysis when some of the basic categories appear to be more central to the study. This category becomes then the axis for other categories. Axial coding is defined by Strauss & Corbin (1990: 96) as:

"A set of procedures whereby data are put back together in new ways after open coding, by making connections between categories. This is done by utilizing a coding paradigm involving conditions, context, action/interactional strategies and consequences"

Selective coding begins when the focus of analysis has been narrowed to a few key categories. The researcher attempts to identify the core category, (the main theme of the study around which all other categories revolve) and others are left aside (Mellon, 1990: 74-79). Selective coding is defined by Strauss & Corbin (1990: 116) as:

"The process of selecting the core category, systematically relating it to other categories, validating those relationships, and filling in the categories that need further refinement and development."

The literature advocates the writing of memos during the process of analysis, and indeed during almost all the research. Miles & Huberman (1994: 74) consider it so important that they suggest: "Always give priority to memoing. When an idea strikes, STOP (sic) whatever else you are doing and write the memo."

Graphic displays are devices to help researchers in the process of doing analysis. They may be lists, charts, matrices, tables and graphs. Miles & Huberman (1994) suggest a very elaborated set of graphic displays classified in two broad categories: "matrices (rows by columns) and networks (nodes connected by links)."

The use of CAQDAS allowed for the use of these procedures and has facilitated much of the work of analysis, building theory and reporting.



### 3.6. Using Computer Assisted Qualitative Data Analysis Software (CAQDAS)

A comparison between the two following quotations provides a clear view of the way the use of computers for analysis of qualitative data have evolved in the past few years:

"Sophisticated word processing programs, such as Microsoft Word and Word Perfect, allow the investigator to mark these inserted passages and to suppress them easily in screen, disk, or print versions of the file. (...) It is worth adding here that computers can also make themselves useful as a means of searching interview transcripts" (McCracken, 1988: 47)

"The packages usually include the same capabilities as the code-and-retrieve packages, but also have special theory-building features and/or routines. For example, they might help you to make connections between codes (i.e., categories of information), to develop higher-order classifications and categories, to formulate propositions or assertions that imply a conceptual structure which fits the data and/or to test such propositions to see if they apply. These packages are often organized around a system of rules or based on formal logic, offering full Boolean searching or hypothesis-testing features." (Fielding, 1994)

#### 3.6.1. Advantages and concerns

The use of computers to help in the storage and analysis of data was considered from the inception of this research. Fielding (1994) suggests that "it is a commonplace that the very 'richness' of qualitative data makes it cumbersome to analyze, so the emergence of software that promises to facilitate data-handling and to support analysis is of obvious interest." Tesch (1989) points out that "computer aided analysis can reduce analysis time, cut out much drudgery, make procedures more systematic and explicit, ensure completeness and refinement, and permit flexibility and revision in analysis procedures." (Quoted in Miles and Huberman, 1994)

The image of the qualitative researcher surrounded by piles of written interviews (sometimes transcribed using a word processor...), a vast filing cabinet, boxes and boxes of cards, using scissors and glue to cut and paste quotations, is a common place in the literature. (Dey, 1993)

Miles & Huberman (1994:43) conclude from a survey on the use of computers for qualitative research that three quarters of the respondents reported using computers. In the time elapsed between the first and second edition of their book (ten years, 1984-1994), twelve new programs that "suited the needs of qualitative researchers" became available.

The writings on this issue helped in making the decision to go as far as possible in the use of computers not only to store and manage but also to analyse and build theory.

Nevertheless, some concerns have been voiced about the use of computers. Barry (1998) presents a summary of these concerns:

"The main worries are: that it [the computer] will distance people from their data; that it will lead to qualitative data being analyzed quantitatively; that it will lead to increasing homogeneity in methods of data analysis; and that it might be a monster and hi-jack the analysis."

Echoes of these concerns are to be found elsewhere in the literature. Fielding (1994) warns that "the software cannot analyze your data for you, only help". Dey acknowledges an "often expressed reservation (...) that the use of a computer can encourage a 'mechanistic approach' to data."

But such concerns are widely overtaken by the advantages of using computers to aid in the analysis of qualitative data. Balancing the worries above mentioned, Barry also summarizes the hopes in CAQDAS:

"The hopes are that CAQDAS will: help automate and thus speed up and liven up the coding process; provide a more complex way of looking at the relationships in the data; provide a formal structure for writing and storing memos to develop the analysis; and, aid more conceptual and theoretical thinking about the data."

Actually Barry suggests that "it is quite possible that some of these fears about CAQDAS do originate from those who have not worked very much with it if at all." And Dey (1993: 62) concludes with what seems a sound piece of advice: "All that is required is to retain a sense of proportion about the role of the computer; to recognize its limitations; and keep a firm focus throughout on the analytic as well as the technical tasks to be accomplished".

### 3.6.2. Choosing between Atlas.ti and Nudist

Having decided on the use of CAQDAS, the following step was to choose the most adequate package for the present research. The standard book found in the literature for this issue is *Computer programs for qualitative data analysis: an expanded sourcebook*, by Weitzman & Miles (1995). A thorough examination of twenty-four programs is presented, after a detailed discussion of issues relating to the criteria for the possible choice.

But this is a fast moving field and at the time of writing most of the versions of programs discussed in that book are no longer available. The most accurate and updated source for this purpose is undoubtedly the Internet where new articles come up with frequency. Other useful sources of information are the mailing lists on this topic, where experiences from researchers all over the world are shared.

From this source (the Internet) Barry's paper "Choosing Qualitative Data Analysis Software: Atlas/ti and Nudist Compared" (Barry, 1998) turned out to be very helpful as it gives clear advice, and, more than that, guidelines to the choice. The paper focuses on "a comparison between what I see as the two most useful packages: Atlas.ti and Nudist".

Trying and accessing all the packages available was impossible, mainly because it would take an amount of time contradictory with the progress of the research. So the choice was narrowed to the two above-mentioned packages, since they were much referred in the literature and also the most commonly used in the Department. Barry (1998) suggests "that Atlas.ti (version 4.1) and Nudist (version 4) appear to be the two most serious contenders in meeting the requirements of researchers".

The home pages of both programs were visited: Atlas.ti at <http://www.atlasti.de/index.html> and Nudist at <http://www.qsr.com.au/software/n4/n4.htm>. Other useful pages were the CAQDAS Networking Project: <http://www.soc.surrey.ac.uk/caqdas/> (based at the University of Surrey) and Qualitative Research and Consulting: <http://www.quarc.de/english.html>.

In all these cases many resources are to be found not only on CAQDAS but also on grounded theory and qualitative research in general. They have links to other pages, bibliography, full text papers, advice, and access to discussion lists.

Friese presents a very useful overview of four packages, including the two under consideration. She uses a grid comparing the following parameters: data entry; coding; retrieval and coded segments; visualization and drawing links; quantitative elements; linking qualitative and quantitative data; and team work.

Recognizing that "there are many similarities between Nudist and Atlas.ti", Barry (1998) presents a systematic analysis along two dimensions: the structure of the software and dimension and complexity of the project. She concludes:

"Atlas.ti would be the best choice for simple projects with researchers who prefer to work in a more complex software environment or where the software needs to be learned in a hurry. Nudist works best for those who prefer to work in a sequential structured style, particularly for complex projects."

The use of both discussion lists was also very useful. It was possible to feel the flavour of researchers from all around the world using both packages and two impressions came up: Firstly the community of Atlas.ti users is more friendly, ready to share experiences and help fellow researchers beginners as well as experienced ones; secondly there is more help available whenever difficulties arise, and the developer of the program, himself, is almost everyday responding to doubts and giving assistance in the list.

Early in this process, a message was sent to both Atlas.ti and Nudist lists:

"I'm working at the University of Sheffield, Department of Information Studies, on a PhD research on libraries and education. I've joined the list a week ago and I am now in the process of choosing software for my project. I came to the point where I will choose between Atlas.ti and NUDIST. Could anyone give me a few good reasons why I should choose one of them?"

One early feeling started to emerge from joining the lists and issuing this question. Not only much more answers were obtained from Atlas.ti, but also they were much more straight and clear. One of these answers was:

"Jose - I haven't used Nudist, but did spend some time talking to others who

had. I chose Atlas [after a year of research on this kind of software] because it is easy to use [I live in Australia and at that time there was no-one else I could ask here for help] - I taught myself basically, whereas I understand that this would have been more difficult with Nudist. The discussion list is also a fantastic source of help/advice. I have very much enjoyed using Atlas, as I find it logical and intuitive. It certainly provided me with everything I needed to analyze my research." Cas O'Neill

Walsh and Lavalli (1998) compared Folio Views, Atlas.ti and Nudist. Their conclusion is:

"Nudist is just as widely accepted in the academic world (It has some features for quantitative results. Its command language supports the type of in-depth research that goes on in academic projects. (...)

"ATLAS.ti is powerful and smart. It is good for working with text and with graphic data, and it supports quick and creative theory building. Training time to fully utilize ATLAS.ti is substantially less than with NUD\*IST. (...)

"Academic qualitative research specialist (and Macintosh user) Tim Lavalli gives his nod to NUD\*IST for academic work and to ATLAS.ti for business applications. Graduate student, small business columnist and Windows user Birrell Walsh chooses Atlas for both academic and business qualitative research."

Walsh also replied to the question in the discussion list:

"The short answer is that Atlas seems more powerful \*and\* easier to use. Hard to beat that combination. And part of its power is that it facilitates thinking with both sides of the brain - it has good textual facilities; and also good diagramming, graphic and network tools. So when it came time to do my dissertation, I chose Atlas."

Pandit (1996) used Atlas.ti in a research project using grounded theory, and reports his experience:

"A number of attributes distinguished it from the alternatives. Firstly, it is very 'user-friendly' and operates in a similar manner to the more widely used *Windows* package developed by Microsoft. Secondly, it is powerful. Given the immense volume of data to be analyzed, problems were expected but thankfully never materialized. Finally, it is thoroughly based on the principles of grounded theory generation and therefore few compromises had to be made."

The two demo versions available in the websites were downloaded and tried for a week. Nudist cannot really be considered a difficult program to use and learn, but the work with Atlas turned out to be easier and more rewarding. During this period of



time only their basic functions could be tried, but even so some differences emerged. Two basic examples are: while Nudist requires in advance that you decide what are going to be the data units (and have them separated with a hard return) Atlas.ti allows you to decide what are going to be your quotations and change them as you go along; besides Atlas allows you to have and see codes as long as you like; Nudist also allows this but only lets you see up to 7 characters.

Having given careful consideration to all these issues, and bearing in mind the similarities between the two packages, Atlas.ti became a natural choice for the following reasons:

- It has been suggested (and confirmed by experience) that it is more user friendly than Nudist. This meant that the time spent on learning how to work with it was reasonable and training sessions could be avoided (although they would have been useful).
- The helpful mailing list gave reassured that help would be easily available if some problem occurred.
- The fact that it allows for more complexity and less structure in advance.
- Its graphical displays
- Last but not least: other researchers in the Department were already using it and their impressions were very positive.

### 3.7. Ethical considerations

Undertaking qualitative research implies a number of ethical considerations regarding both the respondents and the research process itself.

Rubin & Rubin (1995:96) report an extreme situation in which a qualitative researcher faced jail for protecting the identity of his interviewees. This may be an extreme case but it illustrates how important the need for confidentiality and protection of the sources of data may be. Patton (1990: 356-357) suggest a set of topics to be taken into account with regard to ethics in research: promises and reciprocity, risk assessment, confidentiality, informed consent, data access and



ownership, interviewer mental health and advice. Miles & Huberman raise a set of specific ethical issues, posing some key questions for each one and debating some analysis-related implications: these are summarized in table 5 (page 59), and follow broadly the different stages of a research project.

The issues raised did not all apply to the topic and the circumstances of the present research, and the topic itself is not one to raise special concerns. This having been said, the diverse dimensions and problems of ethics in social research were much taken into account in the present study.

The aims of the research were carefully explained at each stage of the research process. That was done in the letter that accompanied the questionnaire, in the letter that requested the interview and during the interviewing process.

Permission to record was asked in advance and confidentiality and anonymity were reassured. In this report every possible effort was made so that no respondent or even the municipality can be identified.

The interviews took place at times and places suggested by or agreed with the interviewees, and all the process of interviewing was quite cordial. Most of the respondents were pleased and looking forward to seeing the results of the research. This promise will be strictly kept and an abstract will be sent to all of them. To offer a copy of the report - as was mildly suggested by one interviewee - is a promise that was not made.

### **3.8. Summary**

This chapter addresses the methodological approach used in this research.

It starts by presenting an overview of the shift from a quantitative to a qualitative paradigm in social science focusing on the use of naturalistic inquiry and grounded theory in library and information science.

The process of designing and using data collection devices for the present research is described and discussed. The issues featured include: the specific role of the literature in a grounded theory study; theoretical sampling as opposed to

quantitative sampling; the design and use of a questionnaire and an open-ended interview schedule; and the process of analyzing data using a constant comparative method.

The choice and use of Computer Assisted Qualitative Data Analysis Software is presented and discussed, focusing on two specific software packages: Atlas.ti and Nudist.

Finally some ethical considerations are discussed regarding both the respondents and the research process itself.

**TABLE 5**  
**Ethical issues**

<b>Worthiness of the project</b>	Is my contemplated study worth doing? Will it contribute in some significant way to a domain broader than my funding, my publication opportunities, my career?
<b>Competence boundaries</b>	Do I (and my colleagues) have expertise to carry out a study of good quality?
<b>Informed consent</b>	Do the people I am studying have full information about what the study will involve?
<b>Benefits, costs, and reciprocity</b>	What will each party to the study gain from having taken part?
<b>Harm and risk</b>	What might this study do to hurt the people involved?
<b>Honesty and trust</b>	What's my relationship with the people I am studying? Am I telling the truth?
<b>Privacy, confidentiality and anonymity</b>	In what ways will the study intrude, come closer to people than they want? How will information be guarded? How identifiable are the individuals and organizations studied?
<b>Intervention and advocacy</b>	What do I do when I see harmful, illegal, or wrongful behaviour on the part of others during a study?
<b>Research integrity and quality</b>	Is my study being conducted carefully, thoughtfully, and correctly in terms of some reasonable set of standards?
<b>Ownership of data and conclusions</b>	Who owns my field notes and analysis: I, my organization, my funders?
<b>Use and misuse of results</b>	Do I have an obligation to help my findings be used appropriately?

(After Miles & Huberman, 1994)

## Chapter 4

# THE EDUCATIONAL NEEDS

*When planning for a year - sow corn, when  
planning for a decade - plant trees, when  
planning for a lifetime - train and educate  
men.*

Kuan Tzu, 3<sup>rd</sup> century BC

### 4.1. Introduction

It has been argued that public libraries are evolving towards a model where their educational roles are becoming increasingly important. Hellen Niegaard (1994:7) acknowledged this in a paper that presented the 1994 version of the UNESCO Public Library Manifesto to the IFLA Conference in Havana, in that year.

When identifying the three major issues that influenced the new Manifesto, Niegaard mentions the development of "new technologies", increasing financial pressures, and the increase of educational needs.

"Libraries in all parts of the world seem to experience a distinct growth in educational demands. Problems of literacy are more actual than ever - in the developing countries as well as in the developed countries."

This Manifesto specifies 12 key missions of public libraries that are at the core of public library services. Many of these missions are related to educational roles.

The present study obtained data from people associated with public libraries both at professional and political levels. Consequently the perspectives about education

are focused on the needs perceived in the communities that demand a response from the libraries and not on the educational needs as a whole. This chapter will identify the educational needs that demand responses from public libraries.

These needs are considered both in the context of people in formal education (children, young people and students in higher education) and adults engaged in open and lifelong learning. Depending on specific circumstances users generally require from public libraries information and materials, space, facilities and equipment, and support, advice and guidance.

A key element in discussing the educational roles of libraries in Portugal is the fact that, as we shall see, emerging from the literature and confirmed by data raised for the present research, the levels of literacy in this country are low, when compared to other Western European Countries. This is true independently of the definition of literacy used to approach the issue. Different concepts of literacy, its individual, social and political implications, as well as the roles of libraries in supporting it will be discussed in depth in chapter 5 of this study.

## **4.2. The library needs of children and young people**

One difficulty in defining the library needs of children and young people lies in the diversity of members of this group. This diversity lies not only in the age factor but also on diverse social and cultural backgrounds.

Defining a profile of today's child, Elkin & Lonsdale (1996) suggest a wide variety of characteristics including the place where the child lives (city or country), its economic background, the kind of family environment, religion and mother tongue. Differences relating to age must also be taken into account.

What is the age of a child, when does childhood ends and adolescence begins, when does a young adult become an adult, are issues that may be approached from different perspectives, as stressed by Greenberg (1979, 90):

"Adolescence is a period of transition and rapid change, a period characterised by accelerated physical, physiological, and cognitive

development, and by new and changing social demands and expectations. The physiological changes of pubescence are frequently used to determine the period known as adolescence, while sociological criteria are used to define its end and a person's passage to adult status. Such events as the end of education, economic independence, and marriage are considered evidence of adult status."

Childhood, adolescence and youth have been seen as periods of life when people make most of the learning necessary for their lives. Although this perspective has been changing in the last decades with the concept of lifelong learning, it is still true that obtaining an education is what individuals are mainly expected to do in the first two decades of their lives. Or, using other words, this is the time when people's educational needs are stronger.

A policy paper prepared for the 2<sup>nd</sup> White House Conference on Library and Information Services, in July 1991, on behalf of the three youth divisions of the American Library Association, presents a comprehensive framework of children's needs that may be met by libraries (Mathews, Flum & Whitney, 1997). The needs identified in this document are:

- The belief in a worthwhile future and their responsibility and desire to contribute to that future.
- A positive sense of self-worth.
- The ability to locate and use information and the awareness that this ability is an essential key to self-realisation in the Information Age.
- Preparation to use present-day technology and to adapt to a changing technological world.
- Equal access to the marketplace of ideas and information.
- The ability to think critically in order to solve problems.
- The ability to communicate effectively - to listen, to speak, to read and to write.
- Preparation to live in a multicultural world and to respect the rights and dignity of all people.



- The desire and ability to become lifelong learners.
- Creative ability to dream a better world.

For each one of these needs the paper suggests a set of ways by which libraries may help children to fulfil these needs.

Another useful framework to help understand library needs of children is used in *Children and Young People: Library Association Guidelines for Public Library Services*. (Blanshard, 1997). It identifies five areas of child development that demonstrate the need for library materials. These are:

- Intellectual and emotional development.
- Language development.
- Social development.
- Educational development.
- Motor skills development.

The data from the present research indicate that the library needs of children and young people are clearly perceived by librarians and elected members in Portugal.

The importance of starting to read at an early age emerged in one way or another from many interviews.

*I think that everything starts in childhood and youth, and this is certainly the case for reading habits, for habits of attending cultural spaces. The library for children and young people may play a very important role, not only creating those reading habits but also giving the children and young people reasons to become interested in cultural issues, in issues that may turn that child or young people into a citizen.*

(Librarian, small town, Central region of the country)

Other needs identified by the respondents relating to the education of children and young people include the need to develop autonomy and a critical mind as well as the ability to understand and appreciate arts.

*If the youngsters don't develop their critical mind, the mind of research, the mind of doubt, of learning by themselves, it is very unlikely that they will*

*have success in their later life as students.*

(Councillor, medium size town, Central region of the country)

*Storytelling hour, art education connected with literature, trying to complement literature and arts... and arts may be cinema, may be music, may be painting, creating sensibility in the child for those cultural areas.*

(Librarian, small town, Central region of the country)

Other ideas emerging from the interviews underline the importance of the provision of an efficient library service for children and young people. The data from the present research suggest that Portuguese librarians and elected members believe that by frequenting libraries, children:

- are more likely to be better users of libraries through their adult lives;
- will have better prospects in education and lifelong learning;
- are more likely to have an affective relationship with books;
- enhance the prospects of accessing Information and Communication Technologies;
- have the opportunity of creative leisure activities;
- interact with other children and youngsters and develop interpersonal skills.

If the educational needs of children and young people are to be met, other people's needs have also to be taken into consideration, mainly those of teachers and parents. One respondent pointed out the needs for teachers to learn information skills if they are to pass them on to the children:

*I think that teaching information skills is important because, as I have had the experience, not only children but also the teachers have difficulties in using the library. Most teachers don't know either. They belong to another generation and were never taught how to use the library.*

(Librarian, small town, Central region of the country)

Other needs of teachers relate to the knowledge and access to literature for children and young people, the organisation and use of the school library, and

education in general.

Additionally, parents also need to be informed about literature for children and young people, and specially about the importance of books and libraries for children's development. Children gain much if they are read to from an early age. Parents may be in a better position to read aloud to them, as long as they are aware of this need and have access to books. Adding to this, parents need information about childcare and diverse aspects of childhood and adolescence, such as health, sex, and education opportunities. Public libraries may play an important role in helping parents to meet the educational needs of their children.

Chapter 8 of this report presents a detailed set of roles played by public libraries in order to fulfil the educational needs of the communities. The following is a brief presentation of children and youngsters library requirements to meet these needs.

#### **4.2.1. Children and young people require books and materials**

One of the aims of basic education is to teach children how to read and write, which are key elements of literacy. A report, by the Department of National Heritage, "Investing in Children" (Great Britain, Department of National Heritage, 1995: 5) is quite clear not only about children's needs but also on the ways to meet those needs:

*"The fundamental need is for children to learn to read. To do this successfully, research has shown that key factors include being read to and the availability and experience of a wide range of books and stories"*

Two major ideas emerge from this quotation, which make a strong case for the roles of libraries: one is the need of a "wide range of books and stories", the other is the need of "being read to". The same report goes on to conclude:

*"Recognition of the needs of children and young people for books, for libraries and for encouragement of reading and the use of information should inform and determine the aims and objectives of all libraries that serve this client group." (page 10)*

The International Federation of Library Associations and Institutions (IFLA) has issued two separate guidelines for library service for children and for young adults.

These documents are quite flexible since they are supposed to serve libraries all around the world, in very different social and economic contexts. However they indicate clearly the requirements of children. They include books, periodicals, magazines and newspapers, audio media (tapes, CDs, records), video films, reel-to-reel films, filmstrips, games, paintings, posters and sculpture, microcomputer and software, and other materials (e. g. slides, globes, etc.) (Fasick, 1991: 25).

The guidelines for young adults identify the need for printed material (books, magazines, collection of clippings and brochures and posters) and non-printed material (audio cassettes, CDs, multimedia (CD-ROMs, CDI), computer software, videocassettes, board and electronic games, and access to local, national and international electronic networks. (IFLA, 1996)

Public libraries in Portugal face an increasing demand for ICT, especially from children and young people. And the socio-economic conditions of the communities are still more relevant to ICT than it is to print materials. As pointed out by one respondent:

*One of the reasons why we have so many youths is because they really want to work with computers, they were born in a new era, the era of computers, but they have not economic power to have them at home. And it can be seen here in the public library and in the library of my school, youths do go to library to use computers.*

(Councillor, medium size town, Central region of the country)

The use of computers in Portuguese public libraries is not yet as widespread as in other countries of the European Union. The PLIS study indicated that in 1996, only 20% of these libraries were automated, compared to 90% in the UK, 44% in France and 50% in Belgium. The study acknowledged however that "planning for the future seems to be on the right track." (Larsen, 1996: 46)

A survey conducted by Figueiredo and Calixto (1998) raised data that clarifies this situation in regard to the services for children and young people. 48% of the libraries responding to their questionnaire had computers in this section. But from these, 47% had only one computer, and many were not available to the public. Only 12% were offering access to the Internet.

However the demand is very high even if the library is not well equipped, as illustrated by the following response:

*We have presently only three PC's. But as we have just seen the kids were using them. And now it's holidays. During term time the demand is much greater and we have queues. And since we have installed the Internet, it's really difficult to cope with so many people.*

(Librarian, small town, Central region of the country)

#### 4.2.2. Children and young people require information

The fact that children need to learn how to read and write, making them require books and materials before anything else, may have led to a lesser consideration of children needs for information.

However the IFLA guidelines for children library services (Fasick, 1991: 32) clearly indicate these needs, stressing that:

"Information services organized by the public library to benefit children and young people are of particular importance, as these groups are not likely to obtain relevant and objective information through existing channels to the same extent as adults.

"Information services for children and young people help them to find their way in society, and develop into conscious and critical citizens."

Children and youngsters need information in diverse circumstances and for several purposes. The most obvious need is to support their studies, to complete assignments and project work for schools, and as preparation for a vocation. But they also need information with other diverse aims, as stressed by Koren (1998):

"The study of the child's developmental process reveals that information plays an indispensable role. In essence, the child is an information seeker. Information affects the physical, emotional, cognitive and social development of the child and this fact has far-reaching implications for the child's providers of information. It is important that all children have access to information and can benefit from such information processes, regardless of the place and time in which they live."



#### 4.2.3. Children and young people require facilities

A space specifically aimed at children and young people is essential in public libraries. Whether this space should use two separate rooms or an open-plan area depends on a number of issues and both solutions have been used. Advantages and disadvantages may be found for each option. These are summarised in the Library Association Guidelines. (Blanshard, 1997a:35).

In Portugal, Guidelines issued by the IPLB advise two different rooms, one for adults and one for children (Portugal. IPLB, 1999: 8). Furthermore what is called the "children section" is divided in two separated but relating areas: The "lending and local consultation area" and the "animation area". The first is the children library itself, while the second is a space for activities such as reading promotion and storytelling.

Other issues relating to facilities and equipment have to be considered if the public library is to meet children needs. These include the amount of space that is allocated and specially designed furniture.

The IFLA guidelines for children (Fasick, 1991) stress some characteristics of the facilities children services should pay attention to:

- Facilities should be functional, attractive, and flexible;
- Facilities require areas both for the provision of services to the public, the use of resources and the storage of books and other materials;
- Facilities require areas for technical and administrative services;
- Facilities should provide space and furniture for children and adults interested in using the library resources and materials, both on an individual basis or in small groups
- Facilities integrating the services for children should have areas for socialisation.

Sometimes children and youngsters use the public library as a meeting point. Furthermore, as many public libraries in Portugal have a cafeteria, the library is



used for socialising, as pointed out in the following response:

*Presently they also consider this space as one were they may be talking to each other. Some come and use other library services, others just arrange to meet friends there, and it turns to be a meeting point. Sometimes we notice that they come in and leave after sometime without having handled a book, or a review, they just came to meet.*

(Librarian, medium sized town, North of the country)

#### 4.2.4. Children and young people require support

Libraries are not as easy to use as sometimes professionals appear to believe. Although children are particularly eager to exploit and try new experiences, they require support, advice and guidance from the library staff, as illustrated by the following response:

*They arrive and feel a bit lost and then they need guidance, especially those who come for the first time. They don't even know what the catalogue is. We have students that are not able to look up an encyclopaedia. They ask for help even to make bibliographic references. They have not that kind of training at school and there is a strong demand for that kind of service.*

(Librarian, small town, Central region of the country)

Children need to be introduced to the library, to be guided on the use of the library, for instance how to consult the catalogue, help on consulting materials and books, to be stimulated to read.

While much of this support is given on an individual basis, libraries have concluded that a more efficient way of providing children and youngsters with the skills necessary to use the library would be doing it in groups. A wide range of activities has been used, and while they are usually seen as being a part of the promotion of the library, they also have an effect in children's library skills.

A survey to children's services in Portuguese public libraries (Figueiredo & Calixto, 1998) identified a set of promotional activities, some of them very common. Almost every single library organises storytelling; 24% of the respondents to that survey informed that they do it on a daily basis and 31% do it several times a week. Other activities listed include workshops, meetings with authors, guided tours and book

fairs.

The requirement of library support relates directly to the issue of staff. While support may be offered in various different ways (leaflets, guiding signals, on screen) the role of librarians and library assistants is paramount in providing the support required by children and young people. The role of personal, face to face guidance is illustrated by the following story told by one of the respondents:

*A young girl was borrowing "The unbearable lightness of being". I asked her: "Are you taking that book?" She asked, "Why are you asking. Am I not allowed to?" I replied: "You may take it, but I don't think you will be able to read it." She was quite young, 12 or 13 years old, but she insisted, saying that she thought she would be able to read it. So I said: "Ok, have a try". Two days later she came to return the book saying: "You were right, I didn't like, I couldn't read it." So I suggested other books more appropriate for her age.*

(Librarian, medium size town, North of the country)

#### 4.2.5. Public libraries, communities, schools and families

One could argue that other people or institutions in the communities also have a role to play in providing children and young people with books and information, and promoting literacy. Among these institutions are the family and the school, and they certainly play these roles. The studies carried out in Portugal and elsewhere clearly indicate that family and schools are perceived to play an important role in promoting literacy but are not always able to meet the children's needs.

The situation in Portugal should be approached with caution as far as the reliance on these institutions is concerned. The low level of literacy in this country has already been mentioned earlier in this study. So, concerns exist that some families may not be in a good position when it comes to promote children's reading. The following response echoes this concern:

*If a youngster's family has a very low level of literacy, it is very likely that parents will not care to have a specific space to study at home. For that family - and sadly there are still many cases - having a child studying is seen as a burden, because if he or she was working the family's income would be higher. I know for sure of cases where they find it difficult even to buy a pen or a pad, and these kids have a very hard time.*

(Councillor, medium sized town, Central region of the country)

Data from other research confirms the possibility that some families have literacy problems and pass them on to their children. Freitas, Casanova & Alves (1997:111) found that only 21% of the respondents to their survey were at the moment reading a book, and 46,6% stated that usually they don't read books. The conclusions of the National Study on Literacy (Benavente, 1996: 41) are still more pessimistic. Only 13,1% of the respondents were found to be reading a book, only 9% read one or more books a month and 70% never or seldom read a book.

The issues raised by these data were confirmed by the following response:

*In a municipality like ours, where the rates of school dropout and illiteracy are very high, if we don't provide support, if we don't promote reading amongst young people, we are likely to have these situations in generations to come.*

(Librarian, medium size town, North of the country)

The economic difficulties faced by some families may add to the difficulties of children in having a place to study or do homework, adding to social inequity. The following statement exemplifies this widespread concern:

*In our region, many families are still living in a precarious economic situation. If society is unable to sort out these situations, I think it has the duty of providing facilities where young people can study, obtain information, and do their homework, because it is a way of fighting inequality.*

(Councillor, medium size town, North of the country)

Schools are other institutions where children are, in principle, encouraged to read. But they too face difficulties, including the poor provision of school libraries. This issue emerges very clearly from most of the respondents of the present study.

A councillor, himself a teacher by profession, said:

*"School libraries as a rule are poorly organised, they have a great shortage of materials, they have economic difficulties in the acquisition of materials."*

(Councillor, medium size town, North of the country)

Another response spoke of a librarian's experience in supporting school libraries:

*I know the reality of schools as I am presently working with school libraries. It is shocking to see that when we go to any school, mainly those that are not in the home of the municipality, those that are at the boundaries. They have absolutely nothing, not even what sometimes teachers call the school library that is a small cabinet with a few books inside, they have not even that.*

(Librarian, medium size town, North of the country)

Other characteristics of some communities raise serious concerns about the access of their members to books and information, and more generally to cultural goods. In some areas of the country the density of the population is very low, making it a long way between home and school. Adding to this the provision of library services in small villages, as well as bookshops, is virtually non-existent. These issues emerge from many interviews, and are especially relevant in small communities, away from large towns.

*Most of our primary schools are very small. Apart from two in the major towns, all the others have between 30 and 40 children, spread by 18 districts distributed in a wide geographical area.*

(Librarian, small town, Central region of the country)

*There are no spaces for children to study and do their homework. And in their villages there is not any library service.*

(Councillor, medium size town, North of the country)

*Many are working and studying at the same time, others are simply studying. Many come from the suburbs, they come to town very early in the morning, in many cases they leave home at 7AM and return at 7PM. In many cases they have classes only in the morning others may have classes only in the afternoon, but only have one transport each way.*

(Councillor, medium size town, Central region of the country)

These data suggest that, whilst considering the important roles of families and schools in promoting literacy and access to books and information, some special characteristics may make it very difficult to fulfil these needs of children and young adults. Furthermore, the public library is seen as an institution that is especially well positioned to meet these children and young people's needs.

### 4.3. The public library needs of higher education students

Public libraries have not had generally the provision of services to students in higher education amongst their aims. These are supposed to have their needs fulfilled by academic libraries in their specific fields of studies.

However there is evidence that for a number of reasons these students also require services from public libraries. This raises some questions on the extent to which the public library is able to cope with such demands, and indeed if it should, especially when there are financial constraints.

The number of students attending higher education in Portugal has been growing for the last 30 years. According to data from UNESCO, in five years only (1990-1995) this number increased 67%, from 185.762 to 319.525.

Other change has been taking place in the panorama of higher education in Portugal. While up to 30 years ago higher education was much concentrated in the three main towns (Lisboa, Porto and Coimbra), there has been a movement of decentralisation, bringing higher education to many medium and small towns throughout the country. Besides, many new private universities were created, adding to the traditional or newly created state owned universities and polytechnics.

The data from this research suggest that it is precisely in the towns where these recently created universities are situated that student demand for public library service is higher. The implications of this demand will be discussed in detail in chapter seven, but it is clear that higher education students put pressure on public libraries, demanding books and materials, place to study and support from staff, as illustrated by the following response:

*What is happening presently is that university students turn the public library into a study room and demand that we support them.*

(Librarian, medium size town, North of the country)

Another response confirmed these demands and added a hint of some problems



arising:

*This library, in this town, where there are no specialised libraries, no university libraries, is the great resource for all of them, whether we like it or not.*

(Librarian, medium size town, South of the country)

Some of these problems relate to the aims of public libraries, and there is a general perception that academic libraries should be the ones catering for student's needs. However, as shall be discussed in chapter seven, many public libraries also play a relevant role in meeting the needs of higher education students.

#### 4.4. The public library needs of adult learners

The role of public libraries in lifelong learning has been often pointed out and will be discussed in detail in chapter 6. At this point the focus is on the public library requirements of lifelong learners.

A study carried out under the auspices of the European Union, Public Libraries and the Information Society (PLIS), (Thorhauge, 1997: 15) found evidence of the needs of library services for lifelong learning in a number of European countries.

"A very strong argument for the local learning spot is the need for lifelong learning, continuing education and the constant re-creation of knowledge (...) There is a growing need for library services related to education and learning, testified by an increase in their use. This is due to the fact that a greater number of citizens educate themselves, that lifelong learning is a reality as more and more members of the workforce recognise the need for enhancing their knowledge."

The data from this research indicates that there is a clear awareness amongst librarians and elected members of the importance of lifelong learning - when regarded under the more informal aspect - and the implications it may have for library service. The following response is an example of that awareness and stresses the aspects associated with informal learning:

*I think that the library must make those resources available and support the lifelong learning process, which I find important. Even the newspaper, the fact that they come to read the newspaper everyday. And it is interesting to*

*see that the section of periodicals is more used by people that are not so young. They find here an agreeable and comfortable space, where they find information that a few years ago they wouldn't find. This is also a place where they meet other people. Some people may spend here a whole day. Some of them are retired, they don't like to spend their time in the garden bench but they like to come to the library. And they keep improving themselves...*

(Librarian, medium size town, North of the country)

This respondent is one amongst others indicating some of the requirements made of public libraries for support of lifelong learners. These demand space for socialising and meeting people and materials to support their learning. Local studies collections are often mentioned as a resource much used by members of the public interested in finding out about the local community.

*We have users that were not used to frequent libraries in their youth and a good reason for that is that they just didn't exist. Nowadays they come and enjoy it and find information here. This happens a lot with the local studies collection, everything that has to do with our town.*

(Librarian, medium size town, North of the country)

The activities organised by the library are often seen as learning opportunities. These may include conferences, meeting with authors, book talks, art exhibitions or informal courses.

Fiction reading has also been identified as a means by which adults (and children) may learn informally. This was emphasised by Kendall (1998:55):

*"Fiction reading for pleasure is the means by which many adults learn informally: about the experiences of others, about life in other countries, about other periods of history."*

The following story illustrates what adults may require when it comes to learn from fiction:

*An old lady that works in a small shop in a village came by one day. She complained that she felt lonely and bored and that the business in the shop left her much free time. So she started borrowing books, and currently she comes to town every fortnight. She always brings three books she has read and borrows new ones. I think she increased her knowledge, because the kind of books she is borrowing now is different from what used to be. The first time she came, the library assistant showed her around, showed where*

*the books are, gave her some advice. But now she doesn't require help any longer, she goes straight to the shelves and chooses what she wants. In the beginning she would only borrow Portuguese authors, now she has a different and more diversified kind of reading.*

(Librarian, medium size town, North of the country)

The requirements for a more structured and purposeful way of learning do not emerge so clearly from the interviews carried out for the present study. This is perhaps better understood if one considers one conclusion reached by Public Libraries and Adult Independent Learners, a research project funded by the European Union (Clwyd County Council, 1994: 44):

*"There is a distinct lack of tradition of adult independent learning in Portugal, and a consequent shortage of provision of information, and of actual experience in dealing with adult independent learners."*

Responses to the interviews appear to confirm this situation:

*Presently is of little importance. The community has no requirements for that.*

(Councillor, small town, central region of the country)

Another one said:

*I am not much within that issue, because we have never had demands here, nobody has ever mentioned that kind of support.*

(Librarian, small town, South of the country)

However, some responses acknowledge that there is a potential need brought about by evolving social conditions:

*There is nowadays a great willingness in people of self-enhancement. Training in workplace made people more aware of the need for lifelong learning. The work mobility, the employability, as now it is known, demands it. Today people are trained for a vocation, which tomorrow will be outdated.*

(Councillor, medium size town, Central region of the country)

*Library users, being very diverse, have self-training needs that have to do with the characteristics of our community life that has changed much lately. People need to update, for instance to apply for new jobs.*

(Librarian, medium size town, Central region of the country)

It is presently impossible to identify the reasons for the disparity of opinions relating the needs of lifelong learners, and how those needs are perceived, and further research would be necessary in this topic.

Some suggestions may, however be put forward. One is the general lack of tradition of open learning in this country. In fact more than one librarian said that it was difficult to find in the market study materials specifically designed for independent learners, other suggest that their quality is low.

Furthermore, only after the involvement of some Portuguese libraries in the PLAIL project, in 1994, the role of the libraries in supporting independent learners started to be discussed in the profession. This may mean that, even if there is a need, some librarians may not be able to identify it.

## **4.5. Summary**

This chapter identified the educational needs that may be met by public libraries in Portugal, as perceived by librarians and elected members.

These needs are considered both in the context of people following formal education and lifelong learning.

The essential needs of children and young people are associated with literacy. This is considered in a traditional perspective that identifies literacy with being able to read, write and count and the ability to use these skills in diverse social contexts. Other approaches to literacy are also considered, including those associated with the media, information and computers.

The public library educational requirements of children and young people in Portugal, as identified in the data from this study, are:

- Books and materials appropriate for diverse groups of users, considering age, social and cultural background. These materials include audio-visual and software;
- Information for studying purposes and to fulfil their interests and needs;

- Facilities and equipment specially designed, providing for a set of activities, including homework, access to computers and for socialising;
- Support in using the library, in finding information, in being encouraged reading and using information.

Some specific conditions of the communities may make these needs gain a special importance. In Portugal there are still high levels of illiteracy and some families may just not be able to provide facilities and support for study at home. Furthermore many school libraries are very poor. These conditions add relevance to the roles of public libraries.

Higher education students are another group of users that demand services from public libraries. There is a general perception on the part of librarians and elected members that these users needs should be met primarily by academic libraries, but there is evidence to suggest that these in some cases are not able to cope. This is specially felt to be the case in towns with more recent and privately owned universities.

Nevertheless, even in towns which do not have a University or with ancient and well established universities needs were also identified, for instance as a place to study during holidays and weekends.

Lifelong learning is perceived as an essential activity in today's societies (Longworth and Davies, 1996) and public libraries are seen as playing an important role in supporting it (Batt, 1998). The perception of this issue in Portugal is twofold. When lifelong learning is considered under an incidental, non-formal perspective, learners needs are clearly perceived and the library is considered to have a role to play in meeting those needs. When, on the other hand, the conception of lifelong learning is more structured and purposeful, the learners needs are not so apparent, and the role of the library is only partially acknowledged.



## Chapter 5

# THE ROLES OF THE PUBLIC LIBRARY IN SUPPORTING LITERACY

*Support to literacy is the foundation of our own existence as libraries, since all our activities converge on that aim. It is our reason for being.*

(Librarian, small town, Central region of the country)

### 5.1. Introduction

The previous chapter identified the perceptions that librarians and elected members in Portugal have about the educational needs that should be met by public libraries. The roles and functions of public libraries in meeting those needs will be discussed in this and in the next three chapters.

These roles do not emerge separate from each other; on the contrary they constitute a set of facilities, services and activities closely interconnected, contributing to the aims of public libraries. However, for methodological reasons and for clarity's sake they are presented in four different chapters. Chapters five and six concentrate on the support given by public libraries to individuals: chapter five discusses literacy and chapter six lifelong learning. Chapter seven deals with the support public libraries provide to educational institutions and chapter eight focuses on the social impact of these roles.

This study identified a number of roles for public libraries in meeting the literacy needs of the communities. Some of these roles are perceived as being at the core of the library service. This is the case of the services for children and young people and all the aspects of reading promotion. However some distinctions have to be made about some roles, considered by many to be primarily the roles of other

institutions and organisations. This is the case, for example, of support of information and computer skills.

The responses indicate in some cases that librarians and elected members, although considering some roles as important, find it difficult to agree that his or her library is able to play those roles due to certain constraints impending upon them. This will be discussed further in chapter 9, with regard to managerial issues, but the difference between the importance attributed to certain roles and the actual delivery of the corresponding service should be underlined now.

## 5.2. About literacy

### 5.2.1. An open and evolving concept

The complexity of the concept of literacy is suggested by the emergence since the 1980's of literacy studies as a field of studies on its own. The dimensions of literacy may be approached from different perspectives, including sociological, psychological, ecological, linguistic and political.

Literacy has often been associated with the ability to read and write but the scope of this concept has widened along with the concept of reading itself. Furthermore, the emergence of other media has brought about expressions such as film literacy and computer literacy, among others. This is one of the reasons why some authors prefer to use the word in the plural. (Bhola, 1998).

Other expressions emerge from the literature indicating a myriad of ways of conceptualising literacy. They are closely connected with the technical and social transformations which have occurred in the last decades. A list of these expressions would include information literacy, computer literacy, media literacy, family literacy and women's literacy.

The following response illustrates the awareness of this extension of the concept:

*In the past literacy meant to able to read and write, but this is no longer acceptable. Today the media are different. The audio-visual literacy, the language of the audio-visual, everything that has to do with design and*

*publicity, they all have a grammar of their own. Each medium has its own grammar and those who do not understand the grammar of each medium are, after all, illiterates.*

(Councillor, medium size town, Central region of the country)

However, some authors, such as Barton (1994: 23), while recognising the possibility of extending the use of the term to other media and to orality, restrict themselves to "print literacy" as a methodological option.

UNESCO considers that

"A person is literate who can with understanding both read and write a short simple statement on his everyday life. ...A person is functionally literate who can engage in all those activities in which literacy is required for effective functioning in his group and community and also for enabling him to continue to use reading, writing and calculation for his own and the community's development." (Quoted by Bhola, 1997:277)

UNESCO's definition, adopted in 1978, incorporates a set of concepts developed in the 1960's and 1970's. One is "functional literacy", which carries with it the idea of purpose. The other is the idea of a social context of literacy implying that different communities will have different literacy requirements.

Today it is impossible to provide a single definition of literacy, and in any case it would be inadequate. A major survey on literacy that took place in Portugal known as the National Study on Literacy (Benavente, 1996: 4), presents its own definition:

"Literacy is defined as the capacities of processing written information in daily life. These are the capacities of reading, writing and calculating, based on diverse written materials (texts, documents and graphics), currently **used** in everyday life (social, professional and personal)".

Scriber and Cole (1981:236) underlined the extension of the *knowledge* of reading and writing to the actual ability to use these skills, stating that "literacy is not simply knowing how to read and write a particular script but applying this knowledge for specific purposes in specific contexts of use."

Studies carried out at national and international level have used three domains of literacy. A definition of these domains (OECD: 2000, X) is presented in table 6.

A definition of literacy, encompassing many of the ideas discussed above may be found in the following response:

*Of course literacy is not only about reading, it is not only about knowledge or training. I think it is the highest level in citizenship, which leads to the making of our consciousness as citizens.*

(Librarian, small town, Central region of the Country)

TABLE 6

Three Domains of Literacy Skills

**Prose literacy** – the knowledge and skills needed to understand and use information from texts including editorials, news stories, brochures and instruction manuals.

**Document literacy** – the knowledge and skills required to locate and use information contained in various formats, including job applications, payroll forms, transportation schedules, maps, tables and charts.

**Quantitative literacy** – the knowledge and skills required to apply arithmetic operations, either alone or sequentially, to numbers embedded in printed materials, such as balancing a checkbook, figuring out a tip, completing an order form or determining the amount of interest on a loan from an advertisement.

This updated extension of the concept of literacy has led some authors (McGarry, 1994; Lonsdale, 2000) to consider the existence of "new literacies", encompassing visual, graphic and computer-oriented literacies. The American Library Association (ALA, 2000) adopted "21<sup>st</sup> century literacy" as one of five key action areas to fulfil its mission.

Whatever the focus on the concept of literacy, it can be argued that it is essential in the context of Western European societies, so that each individual is able to take control of his or her own life, making informed decisions and participating in the political activities inherent to democracy.

### **5.2.2. Individual and social implications of literacy**

Literacy has deep individual and social implications. Individuals, previously illiterate, when talking about literacy associate it with power, freedom and light (Bohla, 1997). DiAlesandro (1998) uses other words suggested by literacy besides freedom: responsibility, compassion and justice. Strong (1998:36) wrote: "people who cannot read often feel unconnected and alone".

Different studies on literacy are consistent in concluding that individuals with reasonable or high levels of literacy have better life prospects, are more likely to be employed and to be in a better paid job. The International Adult Literacy Survey (OECD, 2000) goes even further and establishes relations between higher levels of literacy and a more equal distribution of income, increased longevity and healthier habits and lifestyles, and public and civic participation. However, some authors (Sousa, 1999; Hunter & Harmon, 1988) do not consider literacy in itself able of significantly influencing social and economic structures.

A concept especially useful for the present study is literacy as empowerment. It recognises that literacy is an important tool for each individual - and nations - to be in full charge of his or her life and decisions. This idea was first put forward by Paulo Freire, a Brazilian sociologist and educator, and applied mainly to adult literacy (Freire & Macedo, 1987). It was for the realisation of this idea that many political movements in the 1960's, especially in Third World Countries, had as a primary task the launching of literacy campaigns. A great movement following these principles also took place in Portugal immediately after the revolution in 1974.

International organisations such as UNESCO and OECD, as well as individual countries, have paid much attention to what may be considered the problem of illiteracy. This attention has manifested itself in two ways: one is the regular and continuous research activities and publication of reports; the other way takes the form of literacy campaigns.

### **5.2.3. Studies on literacy**

The studies on literacy have been mainly quantitative surveys about the levels of literacy in one or several countries or regions. Examples of these studies are



*Literacy in the Information Age: Final Report of the International Adult Literacy Survey* (OECD, 2000), that followed a series of other reports carried out during the 1990's. *Adult literacy in the United Kingdom: a history of research and practice* (Street, 1997) gives a detailed account of literacy research and activities in this country. A major study was conducted in the United States of America in 1992, the National Adult Literacy Survey. Portugal also had its own study on literacy: *A literacia em Portugal: resultados de uma pesquisa extensiva e monográfica* (Benavente, coord., 1996).

#### 5.2.4. Literacy campaigns and literacy organisations

Literacy campaigns and literacy organisations are a permanent feature in today's struggle against illiteracy. They have been fuelled by the results of the studies mentioned above and by the recognition of the need of people with minimum levels of literacy to work in commerce and industry. Bramley (1991) provides a summary of these campaigns in the United States and in the United Kingdom up to the 1980's.

Examples of these efforts in the present are the UNESCO promotion of the World Book Day (23 April) and International Literacy Day (8 September). In the UK, the National Literacy Trust is running campaigns such as the National Reading Campaign and Reading is Fundamental. It publishes a quarterly revue "Literacy today" and runs a useful website (<http://www.literacytrust.org.uk/>). The International Reading Association (IRA) is a US based international organisation with the purpose of promoting literacy. Its activities include literacy campaigns, research and training on literacy, several reviews and the regular publication of books and other materials. Its website is <http://www.reading.org/>.

#### 5.2.5. Literacy in Portugal

In Portugal the Ministry of Education has a department in charge of adult education, the Nucleus of Recurrent and Extra-School Education. Fighting illiteracy is amongst its aims, and four different types of courses are provided including one in adult basic literacy. Local authorities, cultural associations and trade unions are amongst the organisers of these courses.

During the year of 1999 a new Department was established jointly by the Ministry of Education and the Ministry of Employment, the ANEFA (National Agency for the Education of Training of Adults). The Portuguese Association of Publishers and Booksellers (APEL) declared 2000 as the National Year of Reading. Other organisations with activities in this field are national branches of international organisations: Associação Portuguesa para a Promoção do Livro Infantil e Juvenil (APPLIJ), an IBBY branch, and LITTERA - Associação Portuguesa para a Literacia, an IRA branch. These developments suggest a growing awareness in the Portuguese society of the problems associated with low levels of literacy, and the need to introduce significant alterations in this state of affairs.

Studies about literacy in Portugal are very scarce (Castro, 1999) and only in the 1990's did the issue attract interest from researchers, but the field of research has been mostly restricted to literacy amongst school children (Sim-Sim & Ramalho, 1993 and Ramalho, 1994).

However, a major survey on adult literacy took place in Portugal and was concluded in 1995 (Benavente, 1996). This study used a questionnaire and a set of monographs. Amongst its aims were to "know the national situation of literacy skills of the population residing in Portugal with ages between 15 and 64" and "to provide some elements of indirect comparison with international studies in this field." (Benavente, 1996:13).

The key conclusions of this report point out to a low level of literacy amongst the Portuguese population.

"A reasonable level of reading, writing and numeracy skills, that are generally supposed to have been obtained at compulsory school, was only found in a very small fraction of the population under study (Level 4: 7,9%)." (page 398)

Two other studies are also relevant to this topic, *Os jovens e a leitura nas vésperas do século XXI* (Magalhães e Alçada, 1993) and *Hábitos de leitura : um inquérito à população portuguesa* (Freitas, Casanova & Alves, 1997). These are surveys of the reading habits of the population in Portugal, the first of children and young people, and the second to the over 15. These studies used different approaches and,

indeed, different universes. But all the general findings support the conclusions of the Study on Literacy. The International Adult Literacy Survey (OECD, 2000) also provides abundant data supporting the idea of a general low level of literacy skills in Portugal when compared to other industrialised countries.

### 5.3. Libraries and literacy

The present study indicates that the importance of the public library in the promotion of literacy, especially amongst children, is widely recognised amongst elected members and librarians.

*Support to literacy is the foundation of our own existence as libraries, since all our activities converge on that aim. It is our reason for being. Of course literacy is not only the habit of reading, it is not only knowledge, not only training, but I think it is the highest degree in citizenship, that leads to conscience, to the formation of our conscience as citizens. Thus, to me it is the highest point.*

(Librarian, small town, Central region of the country)

Whilst the role of promoting adult literacy is also widely acknowledged, some doubts emerge from the responses, not so much about the involvement of the libraries, but mainly about the real possibilities of reaching adult illiterates. A councillor voiced an extreme position along this line of thought:

*Should the library play a role in fighting illiteracy? I don't think so... I don't think so, because the person with that kind of difficulty will not feel at ease even attending the library.*

(Councillor, medium size town, Central region of the country)

The term illiteracy is much more commonly used by the respondents and elsewhere in the literature in Portugal than literacy, and the expression "fighting illiteracy" comes up more easily and more frequently than the positive approach suggested by the questions of "supporting literacy".

This research did not try to identify the reason for these different approaches, but one suggestion might be the present low levels of literacy in Portugal as mentioned above. That state of affairs may lead those involved in this work to feel as if engaged in some kind of struggle or war against a powerful enemy.

*I think the library exists precisely for that. It is the place where everything needed for the purpose of fighting illiteracy can be met, either documents or actions or projects.*

(Librarian, medium size town, South of the country)

*Mainly because in Portugal illiteracy is very high. I think that libraries, in conjunction with schools, may stimulate learning and literacy. I don't know if we are talking about basic literacy, being able to read and write, or being able to understand what is read. Because sometimes people are able to read but the problem is that they don't make use of that ability, and cannot understand a text. The library has an important role but it has to work in conjunction with schools.*

(Librarian, small town, South of the country)

*Everybody is supposed to finish compulsory school with a minimum set of capacities, including being able to read. But sadly this is not always the case. We can even consider several levels of illiteracy. We may even speak of illiteracy amongst undergraduate students in higher education. I think that libraries are very important in fighting illiteracy. At present with localised action, but mainly preparing for the future, because illiteracy cannot be overcome from one day to the next.*

(Councillor, small town, South of the country)

The literature on the roles of libraries in supporting literacy is abundant and generally reflects the tendency of an increasing involvement of public libraries in education. As early as 1984, Smith (1984:87) acknowledged that "libraries have increasingly come to realize in the last decade that they should play a more active role in literacy education".

Some of the key missions of the UNESCO Manifesto clearly point out the roles related to literacy in all age groups. Amongst these aims are: "Creating and strengthening reading habits in children from an early age" and "supporting and participating in literacy activities and programmes for all age groups, and initiating such activities if necessary".

Libraries and library associations in most parts of the world have been involved in the promotion of literacy. IFLA paid much attention to the issue, and following the publication of "Guidelines for Public Libraries Promoting Literacy" (Thomas, 1993) it was decided in 1995 to create a Literacy Working Group to study the feasibility of a major IFLA initiative in this field.

This Group presented a report (IFLA, 1999a) with six major recommendations:

- IFLA must advocate the major role libraries play in the promotion of literacy;
- IFLA needs to continue to develop guidelines for libraries in promoting literacy activities;
- IFLA should serve as a clearinghouse for literacy programs in libraries;
- IFLA should provide leadership in the development and provision of continuing education and training manuals for libraries and, where needed, translations of these into various languages;
- IFLA should serve as a major communication channel for literacy programs in libraries;
- IFLA should have a major role in focusing research on libraries and literacy.

The Working Group report outlines three areas in which libraries can assist literacy activities (Cole, 2000):

- providing collections in support of literacy;
- actively participating in instructional programs for learners, and
- providing support services for literacy efforts by the library and other organisations

The IFLA report also provides a list of organisations worldwide that aim at the eradication of illiteracy, but points out a very remarkable issue: none of the organisations listed include libraries as major players with literacy programmes. Although it is not possible to conclude that this is the case with every single institution, it is an issue that deserves the attention of libraries when planning literacy programmes. Smith (1984:92) had already pointed out this issue, considering however that libraries had also neglected these roles, an idea echoed by Strong (1998:39) who criticises the fact that "the library profession is still arguing over our role in fighting illiteracy".



There is evidence to suggest that the remark of the IFLA report fully applies to Portugal, if one excludes the IPLB (with the role of promoting both libraries and reading) as shall be discussed later in this chapter.

Research carried out in the United Kingdom (Elkin, 1996: 66) has widely recognised the role of public libraries in supporting literacy. Lonsdale (2000: 30) wrote: "Traditionally, the public library has been perceived as a major component in the movement to promote literacy".

The Library Association Guidelines (Blanshard, 1997: 21) indicate three roles which children's libraries may play in promoting literacy. They are as follows:

- providing and promoting material which assists reading development in young children
- organising activities (sometimes with other agencies) which promote literacy
- providing and promoting services which assist those with literacy difficulties.

A Portuguese author (Nunes, 1996:164) also stated the capacity of the public library in the promotion of reading habits and literacy:

"And here we have the public library, with the immense capacity of attraction it may exert via the collections of books and other documents that it provides, the spaces and the furniture, the activities it promotes.

"In these libraries, mainly in the public libraries comprising the National Library Network, conditions may effectively be created to help discovering or developing the pleasure of reading, and also the need to read. "

Several other issues may be identified in the literature on libraries and literacy. One is the need for co-operation and networking. In these as in many other issues, the public library cannot efficiently play its role in literacy if it works in isolation. Thus the need to identify relevant partners in the community and work in co-operation must be pointed out (Smith, 1984). The provision of services will depend heavily on the characteristics of the community to be served. The kind of service will vary if the users are going to be predominantly male or female, adult or child, if the community

is rural or urban, if ethnic minorities exist in the community, if there are special populations such as the disadvantaged or the homeless (Bramley, 1991).

### 5.3.1. Providing books and other materials

Chapter four outlined the provision of books and other materials as a major library requirement of children and young people as well as of adults. This is still seen as a major function of public libraries in supporting literacy. This is still more important considering some specific conditions of Portugal, for instance the low level of school library provision and the scarcity of books at home.

Several respondents pointed out these issues:

*The children's library is the first step in learning how to read, because kids need books in order to perform better at school.*

(Librarian, medium size town, South of the country)

*It may be and sadly it is often the first contact children have with books. It may be a fantastic discovery, the discovery of other worlds, worlds of the imagination.*

(Librarian, medium size town, Central Region of the country)

*Since the collections of school libraries are very poor, it is only natural that children use the public library. So we must provide a service for them. We have to have books to captivate those readers, and mainly we have to establish a way of exchanging information and supporting schools, and of having activities aimed at stimulating them to come to the public library.*

(Councillor, medium size town, South of the country)

A key conclusion of Investing in Children (Great Britain, Department of National Heritage, 1995), outlined the importance of public libraries in the provision of books for children:

*"Public libraries are the only means whereby the widest choice of titles can be made available free of charges to the user. They also have, or should have the means of making books accessible to children through display, promotion, advice and assistance. They are the one potentially constant source of supply of books which can also provide an environment in which to enjoy reading and gain value from it."*

Books are seen as a major source of information, a tool to develop a set of skills, including, obviously, reading skills. But another dimension of the importance of

books and reading emerged from the data of this study: an emotional dimension materialised in the pleasure of reading, the development of children's imaginations and the love of books. The importance of starting to read and to use libraries from an early age was widely recognised by many respondents.

*The children's library is important because it adds the component of enjoyment and of wonder, of reading for pleasure. I think we should be aware of the need for an affective relationship with books, even before they enter school, a kind of relation similar to the one they may have with a toy or a dummy.*

(Librarian, medium size town, South of the country)

*It is from these early ages that we must start working at making good readers, complementing what is done at school, and at the same time instilling reading for pleasure.*

(Councillor, small town, South of the country)

Research carried out in the United Kingdom confirms this perception of the role of libraries in developing a desire and love of reading. Lonsdale (2000:22) wrote:

*"Our study showed that great importance is placed upon fostering recreational reading and instilling the desire to read rather than on promoting the development of reading skills through the formal education of the child."*

Another contribution of the library to children's education and reading from an early age is illustrated by responses that add culture and a sense of citizenship to the previous outcomes.

*The initial education of individuals is determinant for the use they will make in the future, as adults, of information, and also in exercising citizenship.*

(Librarian, medium size town, Central region of the country)

The promotion of reading skills in adults - even if sometimes it is seen as more difficult and raising special problems - is nonetheless considered as a role the library must not alienate itself from.

*We must talk about the functional illiterates, those people who attended school a long time ago - I am talking about an age group of over 50 - they did what was known as the primary school, compulsory school, but since then have rarely picked up a book, a newspaper or a magazine. And the rarity of using those media lead to them becoming nearly illiterates. The public library provides access to books and as long as it has created the pleasure of*

*reading in those people, it is fighting illiteracy.*

(Councillor, small town, Central region of the country)

Although it may seem arguable, one strategy to promote reading amongst adults with low levels of literacy, illustrated by more than one response to the present study, has been encouraging them to read juvenile fiction.

*Many people here started by reading books for children. You might be a bit shocked... I feel that sometimes people are a bit shocked when I suggest them a book like that; they think I am putting them down. But then I explain, I say that I read those books myself, and it is very good, and they end up reading them...*

(Librarian, medium size town, Central region of the country)

Bramley (1991) dedicated one chapter of his study to the materials provided by the public library to adult basic education. While conceding that not all materials published for children should be excluded from adult basic education, he warns against the danger of giving adults the impression that they are being treated as children because they have reading difficulties.

As mentioned earlier in this chapter, literacy is no longer exclusively associated with the ability to read and write using printed materials. The extension of the concept includes not only the appropriate use of those skills but also the use of other media, including electronic and audio-visual.

The necessity of the public libraries to provide a wide range of media is acknowledged both by the respondents to this study and confirmed by the literature.

*Giving people the opportunity to... making available not only books but also audio-visual materials, anything that might help to improve. They go and obtain things from books from music, from video, even from a small display...*

(Librarian, small town, Central region of the country)

Books are sometimes seen as being threatened by other media in the preference of children. Although recognising the importance of audio-visual materials, the idea that books are special and are under threat, thus deserving special attention from the library, pervades many of the responses given to the present study.

*Nowadays, children have many attractions, and the contact of children with books may be lost if there is not a well-structured and organised programme*

*for books and reading, and if we leave this up to the spontaneity of the market, I mean the market of information. And today's children and youngsters are bombarded daily with tens or hundreds of messages, overlapping one another. So we must always focus on the book, I think this is a really high priority.*

(Councillor, medium size town, Central region of the country)

*I think that the library, the school and society are the three basic piers essential in the fight for literacy. However, as we live in a society of image it is extremely difficult to lead people to reading and instil the idea that reading provides a different and superior understanding of things*

(Librarian, medium size town, South of the country)

### 5.3.2. Supporting information literacy

The data from this research are consistent about the perception of a general lack of information skills in the education system in Portugal. The following response exemplifies this perception:

*We are all aware that nobody is taught how to do research. People are not taught at schools how to do a bibliographic search, they are not taught at the library, they are not taught anywhere. (...) They don't know how to look up an encyclopaedia or a dictionary, they don't know if they are organised alphabetically or otherwise. For other information, such as the Internet, they also don't know where to find databases. There is a great unawareness about the importance of information and where that information may be found. I think that there is a lack of awareness in Portuguese society. And sometimes at the most unsuspected levels, people doing masters or PhDs, University teachers...*

(Librarian, medium size town, South of the country)

This may be better understood if one considers the poor provision of school libraries in Portugal, as we shall discuss in Chapter Seven, and the prevalence of an essentially traditional pedagogy based on talks and textbooks.

Changes in education throughout the world have emphasised the importance of learning how to learn, alongside lifelong learning (UNESCO, 1996). This is of great importance to library work as suggested by Greenhalgh & Worpole (1995: 104).

"What psychologists of learning are now saying is that the most important skill of all in this model is not rooted in the acquisition of knowledge, or in the subject matter itself, but in the motivating and self-rewarding quality of learning to learn. This quality combines a mixture of study skills,



interpretative skills, and an awareness of the processes and sources of new information and knowledge in a deregulated and de-institutionalised world. Who better to acquaint people with these skills than librarians?"

The report "School libraries: the foundation of the curriculum" (Great Britain: Office for Arts and Libraries, 1984:8) had already concluded that "learning to learn and learning to handle information are the key parts of the curriculum content of schooling, both for school and other study success and as a preparation for adult life". Closely connected with the concept of learning to learn is the acquisition of information skills. These have been defined in many different ways. Herring (1988:42) defined them as "the skills a pupil needs to identify the purpose of, to find and to successfully use information in curricular work".

Diverse models have been used to present information skills by dividing the process into several phases. Herring (1996) suggests the PLUS model in four phases (Purpose, Location, Use and Self-evaluation). The American Library Association issued a position paper on information literacy (American Library Association, 1993). In this, a number of steps, representing the basic elements in an information literacy curriculum, are presented:

- (1) Defining the need for information;
- (2) Initiating the search strategy;
- (3) Locating the resources;
- (4) Assessing and comprehending the information;
- (5) Interpreting the information;
- (6) Communicating the information; and
- (7) Evaluating the product and process.

The ALA framework for information skills does not differ much from the often quoted "nine question steps" suggested by a working group in what was to become a seminal text on this issue (Marland, 1981:50). These questions are:

1. WHAT DO I NEED TO DO? (formulate and analyse need)
2. WHERE COULD I GO? (identify and appraise likely sources)
3. HOW DO I GET INFORMATION? (trace and locate individual resources)

4. WHICH RESOURCES SHALL I USE? (examine, select and reject individual resources)
5. HOW SHALL I USE THE RESOURCES? (interrogate resources)
6. WHAT SHOULD I MAKE A RECORD OF? (record and store information)
7. HAVE I GOT THE INFORMATION I NEED? (interpret, analyse, synthesise, evaluate)
8. HOW SHOULD I PRESENT IT? (present, communicate)
9. WHAT HAVE I ACHIEVED? (evaluate)

The responsibility for teaching information skills is considered as remaining mainly with schools. However, it is an issue the public library cannot ignore. Respondents acknowledged the fact that children often came into the public library without any guidance from teachers, and that they have many difficulties in using the library efficiently. The idea that teaching information literacy is primarily a task of the school with the public library playing a complementary part echoes in many responses:

*The development of information skills is a work that may be complemented in the public library, but I think that is mainly a function of the school, and the public library may work as a complement.*

(Librarian, small town of the Central region of the country)

However, other responses indicate that neither schools nor teachers are in a position of being the primary resource for teaching information skills. The following statement illustrates this:

*Most times they don't know. They come in here and get lost and it's the library staff who are there for them. Presently some of the users are becoming more independent because they come here often and they know how to find books and all that. But most of the time, let's suppose those who come for the first time, they just don't know. They don't even know what a catalogue is. We have some users that don't know even how to look up an encyclopaedia, students... Sometime ago one learnt the page by heart because he didn't know how to look up. That's why I think our role is important. Just to make bibliographic references and that kind of things. We have helped, and they ask a lot for it. They have no training for that at school, and teachers don't know how to help them, and here we can be very useful in that service.*

(Librarian, small town of the Central region of the country)

Most of the literature on this subject also indicates schools and more specifically school libraries as the most appropriate places to teach people and train them in information skills. The report "Investing in children" (Great Britain, Department of National Heritage, 1995: 53) suggested that "The school library, particularly in the secondary school, is the natural base for the teaching of information skills...". However, the public library may also have a part to play in this matter, as the same report concluded:

"A central part of the teaching of information skills within the curriculum should be recognition of the role of the public library and the resources it has to offer. The public library is, and must be recognised as, the gateway to the full range of public libraries services and to books and information produced and stored throughout the world."

The relevance of the public library in supporting information skills was highlighted by Lonsdale (2000: 21), who found that almost 90% of the librarians who responded to his questionnaire did believe they had a central role to play in this field. Echoes of this idea may be found in the UNESCO Manifesto that sets "facilitating the development of information and computer literacy skills" as one of the key missions of public libraries.

There is evidence of the work Portuguese public libraries are presently doing in supporting information skills, as exemplified by the following statement:

*And we work with them [the children] in information seeking and information retrieval. They learn how the information is organised and that they may use several media (...) We try to educate them in methods, as far as research is concerned. We try to lead them towards organised thinking, so that they can develop their knowledge, so that they can grow as persons. I think that in our country there is a general lack of method and of systematisation. I think the library has a function of helping users to create some method, helping them in going up the ladders of information seeking, in having a search method.*

(Librarian, medium size town, Central region of the country)

The provision of information services for children and young adults is recommended in several documents. Although information is mentioned in a broad sense, much of its focus is on information relating to education.

The IFLA "Guidelines for Library Services for Young Adults" include in the examples of recommended services "providing reference information (including homework

support" and "Facilitating access to resources outside the collection referrals, inter-library loans". In the examples of recommended programmes they include "Information programmes on special topics (health, sexuality, careers, current issues)". The IFLA "Guidelines for Children's Services" (Fasick, 1991) have a separate chapter on information services for children acknowledging that these services are of particular importance, since this group does not have the possibility of obtaining relevant and objective information via the existing channels, at least not in the same way as adults have.

Equally, the Library Association Guidelines for children's services include "information provision" amongst the aims of these services and consider that library materials offer amongst others "information, through both problem-solving and unguided discovery".

Marion Koren (1996) used another approach focusing on the right of the child to information and its implications for public libraries. Starting from the "Universal Declaration of Human Rights" and the "Convention on the Rights of the Child" Koren defines the specific responsibilities of public libraries in providing information for these age groups.

The data from the present research suggest that there is a clear and widespread awareness of the role public libraries play in providing information when this information is closely connected with the curriculum. The following statements are examples of this:

*I think that the public library, as it is today, plays a very important role in education, because of its close connection with the school, providing books and materials for pupils, helping them to understand the school subjects, and deepening their knowledge, in parallel with a set of initiatives that it may carry out in partnership with the school and that is really a complement to the school.*

(Librarian, small town, Central region of the country)

*The children's library is very important, especially for the younger ones, because in our municipality they haven't many more places where to go for information.*

(Librarian, medium size town, North of the country)

However if one considers other types of information as mentioned above on special topics such as health, sexuality, careers or current issues, no evidence was found that librarians and elected members consider this as a role of the public library. One reason for this may be the fact that the question was not specifically raised in the interview schedule. But the fact that many other issues were raised spontaneously, without any prompt, and this particular one did not arise, may suggest a low level of awareness on the part of the respondents.

### **5.3.3. Supporting computer literacy**

The data from this study indicate that there is a widespread perception especially amongst elected members that other institutions in the community are more suitable than the public library in supporting computer skills. The library is often seen by respondents as a complement to courses provided by other institutions such as schools, the Portuguese Institute of Youth (Ministry of Youth) and by private schools such as Futurekids.

*As far as the support for computer skills is concerned... nowadays, primary schools are more or less equipped with one computer. Therefore, schoolchildren are already familiar with computers. Besides there are many training courses at token prices in this area. And local authorities have done some work in this field. So, I don't see much importance in libraries doing this too.*

(Councillor, medium size town, Central region of the country)

On the other hand it is felt that computer skills are important for an efficient use of the library and of ICT. Furthermore, there is the feeling that although it could be an important role, libraries lack conditions to meet these needs, namely technology and staff.

*Nowadays, just to do a search in the library, if you can't use the computer, if you are afraid of it, as is still very common, you can't even access the catalogue, because the access to the catalogue is done in the computer. Therefore, it is very important that, alongside animation, alongside promoting reading, we are able to support computer skills. That is essential for knowledge.*

(Councillor, medium size town, Central region of the country)



Amongst Portuguese librarians there are also some mixed feelings about the role the library must play in supporting computer skills. In some cases the perception is very clear and theoretically grounded, with the recognition that there is also a social role implicit:

*As with other resources provided by the library, computers allow for a democratisation of access. Therefore, the social function of the library is also fulfilled when the library provides computer systems for many people that otherwise would not have access to them. And not only provides computers as a research tool; the library also allows for the acquisition of computer skills. Therefore, we may consider two important functions: as a tool to access knowledge and information as well as the practice of using and being at ease with technology.*

(Librarian, medium size town, Central region of the country)

In other cases, while recognising that there is a growing role for computers in public libraries, the idea that other institutions are more suited to improve computer literacy frequently emerges.

*Life is organising itself around computers. And those who cannot work with computers are becoming new illiterates. The public library may provide equipment for people to come and work, because many people can't afford to buy a computer and so they can use it here. Besides, we could have small courses for people to come and learn the basics, introducing them to this world that is very far away for many of them. When we think of people over 40 years old... For children, for youngsters, I suppose that that introduction is already made at school, and then the library may give some support, making available a number of computers, because many people don't have them at home...*

(Librarian, small town, South of the country)

*The support of computer skills is important but not essential so that we could think of organising training courses in this area. It is important as a complement, to help meet the user's needs.*

(Librarian, small town, Central region of the country)

*New library: the people's network*, a major report published in the UK (Great Britain, Library and Information Commission, 1997: 28) also found the perception that training in IT skills would be more appropriate for adults than for younger groups:

"Basic computer skills training was particularly appealing, though it seemed more appropriate for adults than for younger groups, who were already taught such skills at school. The idea of an introduction session to the

Internet created strong interest in all groups"

Some respondents to the present study expressed views very much against not only the support for information skills but also to the provision of computers for other purposes beyond information management and provision:

*If you say I have technology available for people to use, I agree with that. I agree with having information resources. When you have a CD-ROM with "The Lusíades", or with Shakespeare, on an encyclopaedia, or any other thing, for me that is as if you have it on paper. To have a word processor, to have Excel, a spreadsheet, and so on, I think it is not our job to have such things. I may be deeply wrong, but I think that is just another thing that is not our job. I think it is just the same as the idea that I should provide a user that comes to take notes with a pen. I consider those kinds of products as tools, only tools that nowadays demand technological means different from the time when we wrote with a pen. If we consider information resources I find computers very important, indispensable. It is obvious that we have to make an approach to the technological world. If we are talking about tools I don't think it is important. Obviously I have to have computers for the use of CD-ROM, accessing the Internet, and so on. But to have a word processor for people to use... The person may have a CD-ROM and print. It is the same as when she would do a photocopy... well... she may take some notes and instead of taking them by hand, then she has a word processor and does copy and paste... If it is that, I think yes, we should have things to make peoples lives easier. Only that requires us to be very careful. Systems have to be prepared to allow for that kind of use. But what I say is: to have that just for him to come and type his homework, and even to be concerned with teaching those things, that, I think we do not have any obligation at all.*

(Librarian, medium size town, Central region of the country)

The support of computer skills in public libraries has been widely acknowledged in research reports and other documents. As mentioned above it is considered as one of the key missions for public libraries by the UNESCO Manifesto. The PLIS report (Thorhauge, 1997: 15) considers the public library as "the local IT centre", and specifies some services that may be offered in the fulfilment of this role. These are:

- access to standard hardware and software;
- basic instruction and support
- access to networks and net-navigator service;
- user education programmes.

The same report suggests that "activities in the local IT centre may also include group presentations on the Internet and many other topics".

Public libraries throughout Europe have been developing projects aiming to encourage the use of IT and more specifically the Internet by children. Examples of these, with the involvement of Portuguese public libraries, are some EU funded projects indicated below. Their titles suggest much about their aims:

- CHILIAS, Children in Libraries: Improving Multimedia Virtual Library Access and Information Skills.

Available [http://chilias.isegi.unl.pt/chilias\\_int/index.htm](http://chilias.isegi.unl.pt/chilias_int/index.htm) [02-08-2000]

- ILIERS, Integrated Library Information Education and Retrieval System.

Available: [http://www.prosoma.lu/cgi-bin/show\\_new.py?id=4643&page=description](http://www.prosoma.lu/cgi-bin/show_new.py?id=4643&page=description)  
[02-08-2000]

In the UK, the partnership STORIES FROM THE WEB aims to "investigate how children's libraries can stimulate the imagination of 8-11 year olds and encourage them to creatively enjoy stories using the Internet" and to "encourage the development of children's traditional and electronic literacy skills.". Available: <http://hosted.ukoln.ac.uk/stories/> [02-08-2000]

Some reasons may be found to help to understand the discrepancies found among the opinions of the respondents to the present study and from these with the literature. One is the widespread belief (not only in Portugal) that the essence of the work of public libraries is the provision of books. Even when technology was considered, its main function was to improve book related library work, not as a medium in itself.

An American study (Benton Foundation, 1996) identified these public visions and concluded that "a strong plurality of Americans said they preferred to acquire new computer skills from 'somebody they know', not from their local librarian". If this is the case in a country where public libraries have an established tradition in Information and Communication Technology (ICT), then it is not surprising that these perceptions are common in countries where the use of ICT in libraries is all but generalized.

A survey conducted in 1997 (Figueiredo & Calixto, 1998) concluded that half of the public libraries had no computers in the children sector, and from the 33 libraries that answered the questionnaire only four provided Internet access for children. The situation is evolving fast, especially within the RILP Consortium, but this includes no more than 17 libraries (Patrão, 1999). However, in principle all the libraries in the National Network have access to the Internet, but there are reasons to believe that the provision of access to users is very uneven.

#### 5.3.4. Promoting literacy

The provision of books and materials is only a part of the work carried out by libraries to promote literacy. Public libraries in Portugal are well known for the work of animation and reading promotion carried out on a daily basis. Several respondents exemplified this work.

*Almost every day we are visited by groups from schools, both from pre-school and primary.*

(Councillor, medium size town, Central region of the country)

*I think that literacy is one of the most important roles, as the work of the library leads to that struggle, the fight for literacy. When we work to elevate the habits of reading, when we organise meetings with authors, when we launch books, when we have a book fair, when we bring somebody to speak about any subject, we are working to support literacy. I think that everything the library does goes in that direction. I think that that is the reason public libraries are there.*

(Librarian, small town, Central region of the country)

*Presently we have two workshops ongoing. One is promoting activities for children; the other one is for training of people involved in reading activities.*

(Librarian, medium size town, Central region of the country)

*Storytelling, artistic expression always related to literature, trying to complement literature with art... and art may be cinema, may be music, may be painting, thus creating a sensitivity in the child, creating the pleasure for those cultural areas.*

(Librarian, small town, Central region of the country)

The survey by Figueiredo & Calixto (1998) concluded that activities promoting literacy in children are very frequent and constitute a main feature of libraries'

services for children. The list of activities identified is impressive as well as their frequency. Storytelling time is the most widespread and frequent activity. Only one in 33 of the respondent libraries did not have this activity, 31 per cent have it at least once a week and 12 per cent have storytelling everyday. Other activities include diverse kinds of workshops (arts, drama, reading and writing), meetings with authors, guided tours to the library, book fairs, reading groups and puppets.

Whilst each individual library with its own resources, including staff, produces some of these activities, they benefit much from actions supported at a national level by IPLB, the Portuguese Institute for Books and Libraries. IPLB organises a National Programme of Promotion of Reading and Dissemination of the Book (Programa Nacional de Promocao da Leitura e Difusao do Livro em Portugal). This programme includes training for reading promotion, support of conferences and festivals, support of programmes on the media, and support for research. Integrating this programme a set of activities is permanently touring the public libraries around the country. These activities include exhibitions focusing on Portuguese literature, poetry read by professional actors, courses on literature with a special focus on literature for children and young people, and courses on techniques for reading promotion. The Portuguese Section of IBBY (International Board on Books for Young People) runs many of these activities.

The data from the present research suggest that public libraries in Portugal are supporting literacy activities in several different ways. However, there is as yet no structured and general approach, especially when it comes to a close relationship with agencies involved in adult education.

*Other actions for continuing education have been made. But I reckon that in the general context of education, and especially for continuing education, it would be important if that happens. This has not been a fundamental sector for our library which has given priority to other things. I think it has some importance. But if we are talking about the adult who is attending continuing education, they have already a curricular part, they attend classes at night.*

*(Councillor, medium size town, North of the country)*

Nevertheless, in one of the municipalities a close involvement with adult education emerged, in a project aiming at support for oral tradition.



*The contribution that has been given by libraries to the teams that are working in continuing education. Actually our municipality is a good example of co-operation between the public library with the team of Continuing and Adult Education. We have several courses of adult education going on in several localities in our municipality, and the co-operation of the public library with these teams has been very useful.*

(Councillor, medium size town, Central region of the country)

No examples of actual classes for literacy education were identified by this research. Furthermore, a general opinion against formal literacy classes emerges from the responses. However, other activities in support of literacy, including training of teachers and library staff, are generally considered acceptable and are actually quite frequent.

The literature provides abundant examples of the activities of public libraries in promoting literacy. As mentioned earlier, the UNESCO Manifesto includes these activities in the list of the key missions of public libraries. IFLA is presently reviewing its guidelines for public libraries. This document (IFLA, 2000) advocates that:

"The public library should also actively support literacy campaigns, as literacy is the key to education and knowledge and to the use of libraries and information services. Newly literate people need easy access to appropriate reading materials to maintain and develop their skills."

This document suggests a number of ways by which public libraries can support other institutions that are combating illiteracy. These include:

- Promoting reading
- Participating in campaigns to combat illiteracy and improve numeracy;
- Organising events to promote an interest in reading, literature and media culture;
- Promoting and providing training in the use of computer technology.

Meanwhile, reports from the work done by public libraries around the world exemplify different approaches to literacy promotion activities, as well as, inevitably, different levels of financing. One impressive example is the Queens Borough Public Library, in New York (Stone, 1998: 37). Amongst the activities provided for literacy instruction at the library are:

- Small-group instruction for adult new readers by trained volunteer tutors;
- Conversation groups for adults learning English as a second language;
- Computer-assisted instruction for students learning English or improving their reading skills;
- Adult basic education classes;
- Tutor training workshops for adult literacy and English for Speakers of other Languages conversation volunteers; and
- Professional educators available for assistance and advisement.

Two different visions on the roles of public libraries in promoting literacy emerge from this study. One vision is closely associated with the activities of reading promotion and animation. The activities under this vision reach individuals who already have basic literacy skills and their aims are to increase reading amongst those who, although with different levels of skills, are already readers. This vision is shared by most of the respondents to this study and activities are actually very frequent. The other vision relates to a structured approach to people who are illiterate or have very low levels of literacy. In this case activities require classes on literacy skills, specially designed materials and high levels of support. Most of the respondents to this study considered that other organisations in the community were more suitable to work at this level, whilst recognising that the public library can provide some support.

The fact that, as mentioned earlier, most of the institutions working on literacy do not consider libraries as relevant partners may be one of the reasons for this second vision. Other factors, as suggested by respondents, are the relative shortage of resources in Portuguese public libraries, including space, materials and staff. But the fact that elsewhere professionals still argue over the roles of libraries in promoting literacy (Strong, 1998:39) echoes in many responses to this study and is surely one of the reasons for this state of affairs.

*The concept of literacy promotion & animation is differently perceived in the two countries.*

## **5.4. Summary**

This chapter addresses the perceptions of Portuguese librarians and elected members of the roles played by public libraries in supporting literacy. It is organised in two parts: firstly several issues about literacy are introduced and discussed; the second part focuses on how public libraries are perceived to support diverse aspects of literacy.

The concept of literacy is discussed, both as it emerges from the interviews and in the literature. Most respondents share an enlarged perception of literacy well beyond the traditional definitions of being able to read, write and count. For many, literacy encompasses the capacities to use, understand and communicate information through diverse media. A recently completed OECD study used three domains of literacy: prose literacy, document literacy and quantitative literacy. Technological and social transformations have brought about new expressions such as computer literacy, information literacy and media literacy, sometimes mentioned as new literacies.

Policy makers in many countries acknowledge that literacy has profound individual and social implications and initiatives are taking place around the world aiming at the eradication of illiteracy. Some of these initiatives are identified in this study as well as some of the important research on literacy carried out in recent years.

Literacy in Portugal was briefly discussed and the fact that the levels of literacy are amongst the lowest in the European Union is acknowledged by many respondents and confirmed by the literature. Institutions working on literacy and studies on literacy in the country are identified and found to be very scarce.

Whilst many organisations working on the development of literacy tend to ignore the roles of libraries, professionals have for a long time, and particularly in the last two decades, advocated the roles of libraries in this field. A recent paper from IFLA considered three areas in which libraries can assist literacy activities: provision of collections, participating in programmes for learners and providing support services.

The concept of literacy encompasses several dimensions and the work of public libraries is differently perceived. A trend in opinion was identified in respondents who

considered that it was impossible for libraries to play any role with those who have very low levels of literacy or are simply illiterates. Furthermore, information literacy and computer literacy were considered mainly as the concerns of other institutions.

The data from this research indicate that the provision of books and other materials was widely acknowledged both by librarians and elected members as an essential tool to fight illiteracy. As far as children are concerned, the provision of books by the public library was seen as essential to:

- foster the pleasure of reading;
- develop children's imaginations and the love of books;
- learn cultural values;
- develop a critical mind;
- acquire a sense of citizenship.

The importance of starting to read and frequent libraries from an early age was pointed out in many responses.

The roles of Portuguese libraries in the promotion of reading skills in adults is also acknowledged, but arguments were voiced which suggested that it would be very difficult for the library to reach adults with literacy problems.

The literature suggests that information literacy is an aspect of literacy where libraries are well placed to play a distinctive role. Information literacy has become more and more important in the context of lifelong learning and new ways to learn how to learn in the information society. The present study identified a situation in Portugal where elected members and especially librarians perceived a generalized lack of information literacy skills at all levels, including amongst students and teachers. However, the role of the public library in this field raises mixed opinions. These include a wide range of ideas:

- teaching information skills is a responsibility of the school and thus of the school library, and is not a public library role;

- the public library may work as a complement to the school where the primary responsibility lies;
- the public library must play a leading role, considering the poor state of school libraries.

This range of opinions is actually matched in the literature, which normally considers information literacy a primary responsibility of schools.

What has been said about information literacy may be easily extended to the issue of computer literacy, that is, computer literacy was not generally considered by the respondents to this study as a need to be met by the public library. Whilst it is recognised that good computer skills may lead to a better use of library resources, other institutions in the community emerge in a better position to play this role. The relatively low level of computerisation in Portuguese public libraries may partially explain these opinions, which are echoed in some of the literature.

Reading promotion and animation are activities that promote literacy and are perceived as well grounded in the work of public libraries in Portugal. Each library runs its own programme but they are supported by IPLB at a national level. However, this study found that there was as yet no structured co-operation with adult education agencies. Furthermore the provision of classes for adult education was not considered as a role of the public library.



## Chapter 6

# THE ROLES OF THE PUBLIC LIBRARY IN SUPPORTING LIFELONG LEARNING

*A learning library needs to think in terms of supporting learning rather than simply delivering materials*

Brophy, Allred & Allred

### 6.1. Introduction

This chapter addresses the perceptions of Portuguese public librarians and elected members, as primary decision-makers, on the roles of public libraries in lifelong learning.

This issue became prominent in many countries during the last decade of the 20<sup>th</sup> Century, due to economic, social and educational changes, which will be discussed below in detail.

Libraries, in particular public libraries, have always supported the self-improvement of their users. However, the growing importance of lifelong learning in society draws the attention of those directly involved in library work to the need of changing their perspectives on the resources and their management, and on their own professional profiles. In addition, there is a need to examine the management of public libraries, if they are to play their roles in what is becoming known as the “knowledge society”.

This study indicates that librarians and elected members consider that the new public libraries in Portugal have an important role in lifelong learning. However, the

perception encompasses only a partial perspective of lifelong learning, rather than the fuller concept employed elsewhere in Europe and as found in the literature (Brophy, Allred & Allred, 1996). In consequence, the roles of libraries, their functions and activities, are seen in a partial and incomplete way

The most striking difference suggested by the data from the present research is that whilst some of the best practices underline the work of the public library in this field as being mainly the support to learning, the perspective of the respondents to this study is often one of a library delivering materials. The library that adequately supports learners offers counselling, guidance and support, provides space and facilities for studying, meeting and tutoring, and has a modern technical infrastructure, allowing for the use of updated networked learning materials.

The findings of the present research indicate that public librarians and elected members in Portugal share a limited and partial vision of the roles of libraries in lifelong learning. This vision focuses on the provision of some materials and on the organisation of “animation” activities and undervalues some basics aspects of lifelong learning philosophy, such as counselling and advising.

Some reasons for these perceptions are discussed: reluctance of librarians to assume non traditional roles, poor public perception of the library roles, lack of resources, the absence of underlying philosophy of the roles of libraries in lifelong learning and lack of tradition of open and distance learning in Portugal.

## **6.2. About lifelong learning**

### **6.2.1. Conceptualising lifelong learning**

Lifelong learning is not easy to define. Definitions are frequently incomplete as they narrow the diverse perspectives and instances of use of a concept. Furthermore, as shall be discussed below, lifelong learning, albeit not being a new issue, has attracted increasing attention in the past decade. Its use became widespread at educational, social, economic and political levels. It is thus no surprise that different

uses of the term apply different dimensions as the concept of lifelong learning is evolving and may have diverse facets.

Lifelong learning has been frequently used as synonymous with lifelong education, but a distinction has been made. Learning focuses on individuals or organizations and on the transformations brought about by experiences into knowledge, skills and attitudes. It focuses on the development of the potential of individuals and organizations. Education focuses on the environment and may be defined in terms of processes, events, activities and conditions of learning (Galbraith: 1995).

Lifelong learning cannot however be separated from lifelong education and this makes it more understandable that the expressions are used interchangeably in the literature and more yet in daily use, as happened with the respondents to the present study.

Lifelong learning is also often associated with adult education. However, while acknowledging that adults are more likely to benefit from lifelong learning experiences, the philosophy of lifelong learning applies to the whole life span, "from cradle to grave, from 0 to 90" (Longworth & Davies, 1996: 23).

When discussing lifelong learning, other concepts must be taken into account, since they are associated with the process and experience. These include distance learning, open learning, independent learning, flexible learning, and when connected to the use of ICT may be extended to such terms as networked learning, distributed learning and online learning (Slade: 2000, 7).

Two different concepts of lifelong learning emerge both from the data from this research and from the literature.

One of these is focused on purposeful learning, occurring in formal institutions or outside them, following a plan of studies, and often aiming at some form of certification. This learning may take place in schools at all levels, or in non-school organisations such as professional organisations, trade unions or churches. It may also be carried out on an individual basis through self-directed study, using learning packages or other materials and implies diverse levels of tutoring and mentoring.

Learning (Galbraith: 1995, p. 100)

For the purpose of this study the term "deliberate learning" (Galbraith, 1995) will be used to identify these diverse kinds of learning.

This conception of deliberate learning is present in some responses to the interviews undertaken for the present study and is illustrated by the following statements:

*The support to independent study and self-learning [is important] because I think it will be one of the characteristics of education in the future. People will increasingly study in an independent way, and people will use self-learning, mainly through new technology, to obtain new competencies that allow them to improve their lives.*

(Librarian, medium sized town, South of the country)

*People need to learn to apply for jobs or to be more skilled in some subjects, but also for training, and for general knowledge which I think is becoming increasingly important.*

(Librarian, medium sized town, Central region of the country)

The definition of lifelong learning adopted by the European Lifelong Learning Initiative (Longworth & Davies, 1996:22) includes some of the ideas mentioned above:

"Lifelong learning is the development of human potential through a continuously supportive process which stimulates and empowers individuals to acquire all the knowledge, values, skills and understanding they will require throughout their lifetimes and to apply them with confidence, creativity and enjoyment in all roles, circumstances, and environments."

This definition underlines important features of lifelong learning, namely the ideas of continuity and individuality as well as the fact that it is a process to be carried out through the whole life span. However it does not consider all the possibilities and outcomes of unintentional learning, as discussed below.

The other conception of lifelong learning sees it as a more informal and loose process of self-enhancement by which individuals add to previous knowledge going through diverse learning experiences. These may vary from reading newspapers and novels, visiting exhibitions or participating in a wide range of events, watching television or travelling. This will be referred to in this study as "unintentional learning" (Galbraith, 1995), and was illustrated by many responses:

*People better themselves, sometimes without effort, just by reading a newspaper, because after a newspaper a book comes up, or they listen to a conference. After all people are bettering themselves...*

(Librarian, small town, Central region of the country)

*I think that people in their leisure time, instead of going to the café or somewhere else, if they have the library, and if the library provides an agreeable space, with the paper they like to read, they will go there. They better themselves, sometimes without noticing it, they improve their culture.*

(Librarian, small town, Central region of the country)

The literature on lifelong learning is relatively small on the perspective of unintentional learning, but a paper by Batt (1998) defends its importance:

"Learning is not simply about following accredited courses to obtain qualifications. It is about gaining knowledge to lead better, more fulfilling lives. Such learning comes frequently in very small quanta. It may be finding out where something is sold more cheaply, or how to travel from A to B in less time. It may be broadening one's emotional experience by reading about the life of another person or locating the self in the context of other people, be they real or fictional."

Craven (2000: 228) considers both perspectives:

"The concept of lifelong learning covers all aspects of learning, whether as part of a formal educational institution or simply as a leisure pursuit."

As we shall see later, lifelong learning as unintentional learning is much more clearly perceived by Portuguese public librarians and elected members as a role of public libraries, and the requirements of library support are more clearly perceived to be for this purpose.

### 6.2.2. Why lifelong learning?

Lifelong learning became a prominent issue during the last decade, with several international organisations (such as UNESCO, OECD) and many countries worldwide bringing it to the forefront of the political agenda. Examples of this are the European Lifelong Learning Initiative and the 1996 European Year of Lifelong Learning. Further developments along these lines are, in the United Kingdom the National Grid for Learning and the University for Industry, and in Portugal the



National Agency for Adult Education and Training, as well as The World Initiative on Lifelong Learning.

However, the idea that men and women need to spend their lives engaged in activities conducing to self-improvement and raising of individual abilities is anything but new. A Chinese philosopher, Kuan Tzu, in the 3<sup>rd</sup> century BC said, "When planning for a year - sow corn, when planning for a decade - plant trees, when planning for a lifetime - train and educate men". (Quoted by Longworth, 1999:3 ).

If lifelong learning is not a new issue, why has it become so important recently?

The data from this study helps to clarify the reasons why lifelong learning is increasingly important according to the opinions of elected members and librarians in Portugal. One of the responses relates the need of lifelong learning with the needs of the work market and everyday life.

*It is increasingly evident that it is a lifelong need, I mean it is not something that you may acquire with a certificate and full stop. Because the demands not only of the work market but also of everyday life lead the person to have a philosophy, a way of being that includes self learning, the search for self-learning.*

(Librarian, medium sized town, Central region of the country)

The changing conditions of society may lead to people having to move from one job to another.

*Today lifelong learning is fundamental. As we now say, if an individual has only one profession, he is wretched. If he does not have a place for self-learning he may become marginal. A person who finds him or herself unemployed and needs to change direction, let's say he has a degree in Philosophy and now has to work on floriculture, because it is now a good business...*

(Councillor, small town, Central region of the country)

A councillor who is a businessman spoke of his own experience:

*Today, for anyone, and I speak in my area for example, to be a good businessman it is not only necessary to produce and make good sales, to earn much money, create surplus value and pay his workers well. Today a businessman, if he is to be really connected in society, he has to have something else. He has to be in touch with society, he has to know its realities, he has to be able to make contact with people, in a word he has to evolve and (...) have a general culture.*

(Councillor, medium sized town, Central region of the country)

The need for lifelong learning does not exclude those who have studied beyond basic education.

*Lifelong learning does not exclude those that have studied, even in the University, and after will need to re-learn or update his knowledge.*

(Councillor, small town, Central region of the country)

Lifelong learning may also be considered a right.

*Lifelong learning is most important, because we must give people conditions to exercise a right that is the right to know, to education, to culture throughout their life span.*

(Councillor, medium sized town, Central region of the country)

From these opinions emerge the association of lifelong learning with changing patterns of working and living, with the need to change jobs and acquire new skills, to improve general culture and social skills.

These aspects, among others, are mentioned by Longworth & Davies (1996:25) who list a set of points that may be considered to be a basis for the growing importance of lifelong learning. These include the influence of science and technology, the restructuring of industry, global demographics, the influence of television and other media, changes in the nature of work, focus on the individual, environmental imperatives, and new global power structures.

A wide and re-invigorated interest in lifelong learning spread in the United Kingdom, especially since the new Labour government came into power in 1997. This government established education as a high priority and lifelong learning as a strategic way of improving the general education level of this country, for what was called "the renaissance for a new Britain". The vision of what would be this new age was put forward by the green paper "The Learning Age: a renaissance for a new Britain" (Great Britain, Department for Education and Employment, 1998). This indicated a series of reasons for the new and paramount importance of lifelong learning.

"We are in a new age - the age of information and of global competition. Familiar certainties and old ways of doing things are disappearing. The types of jobs we do have changed as have the industries in which we work and the skills they need. At the same time, new opportunities are opening up as we

see the potential of new technologies to change our lives for the better. We have no choice but to prepare for this new age in which the key to success will be the continuous education and development of the human mind and imagination. "

Following this paper a set of initiatives were established, including the University for Industry, an open and distance learning network with access to learning packages. Learning Direct, also included in this initiative, is a free phone line to help prospective learners to find learning opportunities.

### 6.3. Public libraries and lifelong learning

#### 6.3.1. Portuguese political and professional perspectives

The present study elicits the perceptions of elected members and librarians of the roles of public libraries in lifelong learning. Diverse and sometimes contradictory perspectives were found in the responses reflecting different ideas of lifelong learning. In some cases, a deep and clear awareness of the importance of the roles of public libraries in this field, even enthusiasm with the idea, emerges from the interviews, as illustrated by the following responses.

*The concept of permanent education leads to people having both the possibility and the enjoyment of learning throughout their life span. And since the school is no longer there - because not everything that we need to learn or wish to learn may be provided by the school - we have to find... the object of our will to learn has to be found in the library. Learning and enjoyment of learning go hand in hand, and have to be found by one.*

(Councillor, medium sized town, Central region of the country)

*I believe that independent study and self-learning will be a major feature in the future of education. People are increasingly studying independently, and people are increasingly using self-learning, namely through the new technologies, with the purpose of obtaining skills to improve their lives. After all we are all doing our best to improve our lives either in material terms, psychological, emotional and so on.*

(Librarian, medium sized town, South of the country)

*The public library is the place of excellence for several kinds of learning, be it non formal - and when I say non-formal I am talking about artistic languages,*

*cultural languages that have their place in the library - the learning of the importance of information and the use of information of any kind, technical, scientific, day-to-day information; and is also a place to learn new technology.*

(Librarian, medium sized town, South of the country)

The two last responses indicate a perception of the diverse dimensions of lifelong learning, and the roles that libraries may play.

However the picture emerging from the interviews suggests that in Portugal, amongst librarian and elected members, lifelong learning is considered mainly under the perspective of unintentional learning. The responses to the question on the importance of the public library in supporting self-learning in a more structured way indicate differences of opinions, contradictions and doubts.

The following responses illustrate the support for the idea.

*Time is gone when people left school and for many years that knowledge was crystallised. Now knowledge is no longer crystallised, knowledge is permanently evolving, and hence the public library allows for those self-learners to have support for their own training.*

(Councillor, medium sized town, Central region of the country)

*Someone has to support self-learners. And who can do that better than the public library? No one. If someone wants to progress in their training, any worker wanting to advance in his training, where shall he go?*

(Councillor, medium sized town, North of the country)

The responses raising problems and doubts varied in level and perspective, and were found mainly amongst elected members. In some cases the idea of libraries supporting self-study seems to be completely new and caused surprise. Other responses revealed that the service does not exist at all.

*I had never thought about that.*

(Councillor, medium sized town, North of the country)

*I cannot answer your question because I really have no opinion. Honestly, I do not know at all. I do not know up to what extent such a thing would have any users or how it could work.*

(Councillor, medium sized town, North of the country)

*For me this is an absolutely new idea about the role that a public library may*

*have. That is a field that I did not include in the horizon of my work for the library. Honestly, no.*

(Councillor, medium sized town, Central region of the country)

*Today education is generalised. We have day courses, evening courses, we have continuing education for those who have difficulties, and we have diverse training courses at diverse levels. So I do not think that self-education is as important today as it was in the past.*

(Councillor, medium sized town, Central region of the country)

Some responses from librarians, although not disagreeing with the general idea, suggest that the services aiming to support lifelong learning do not exist or are very poor.

*As far as I can understand the question, we have nothing aimed at that purpose.*

(Librarian, medium sized town, North of the country)

*I think it is a facet of which Portuguese public libraries have little experience.*

(Librarian, medium sized town, North of the country)

*It would be optimum if only it existed. But in these municipal libraries, especially in these smaller ones, I think that nothing of that kind really goes on.*

(Librarian, small town, Central region of the country)

These data suggest a variety of perceptions amongst elected members and librarians in Portugal on the importance of the role of public libraries in lifelong learning. Moreover they indicate different conceptions of lifelong learning. These become more apparent when one considers some practical issues, i. e. how these roles are seen to be played by the respondents and what activities and resources they associate with those roles. This will be discussed later in this chapter, after an overview of the perspectives found in the literature both at an international level and in the UK.

### 6.3.2. International perspectives

The literature on the roles of public libraries in supporting lifelong learning has increased dramatically in the last few years, denoting a growing interest in the



subject. Slade (2000: 6) identified a "phenomenal growth of the literature" on library support for distance learning since 1995. In that year Van Fleet (1995) argued: "Public libraries were founded and continue to serve as premier institutions for lifelong learning." In a previous text, Van Fleet (1990:199) had already presented a set of reasons why the public library is in a privileged position to play a leading role in lifelong learning.

"The basic components of an effective agency for the learning society are all present in the public library. Learning resources, both material and human, are already in place, in convenient locations and accessible at convenient times. The library is institutionally neutral, and traditionally has recognised the importance of personalised service to the individual. Its services span the entire range of ages and educational levels. Librarians are skilled and experienced in linking learners with resources, both within the library and within the community. The library is a logical focal point for the learning society."

The UNESCO Public Library Manifesto (UNESCO, 1995) also highlights the importance of public libraries for lifelong learning:

"The public library, the local gateway to knowledge, provides a basic condition for lifelong learning, independent decision-making and cultural development of the individual and social groups."

The IFLA Guidelines for Public Libraries (IFLA (2000) consider the roles of public libraries in supporting lifelong learning at both deliberate and unintentional levels:

"The public library supports lifelong learning, working with schools and other educational institutions to help students of all ages with their formal education. The challenge of providing educational support provides an opportunity for public libraries to interact and network with teachers and others involved in education.

"It should also provide a range of materials on a variety of topics, which will allow people to follow their interests and education on an informal basis. The public library should also provide materials to support literacy and the development of basic life skills. In addition the library must provide study facilities to students who have inadequate or no access to these facilities in their homes."

This organization is preparing specific guidelines for the work of public libraries in supporting lifelong learning (IFLA, 2001) indicating thus the growing relevance of the issue amongst the profession at international level.

At European level the role of public libraries in supporting lifelong learning has been attracting an increasing interest. Diverse European Projects, such as Public Libraries and Adult Independent Learning (PLAIL) and Library Integrated System for Telematics-based Education (LISTED) addressed this issue. An investigation commissioned by the European Union studied the roles of public libraries in open distance learning (Brophy, Allred & Allred, 1996). A study on the roles of public libraries in information society (Segbert, 1997) focusing on the use of ICT recognises the roles of libraries in lifelong learning, concluding that the functions of the educational and learning library are:

- "To support formal and informal education - delivering raw and value-added material;
- "To support and inspire open adult learning;
- "To offer learning opportunities in workshops and in a good learning environment."

A Pan European Conference, held in Copenhagen in 1999, brought together senior politicians and policy makers from 31 European countries. The final declaration (The Copenhagen Declaration, 1999) of this conference included lifelong learning amongst the major roles of public libraries:

- "Public libraries provide, through their widespread distribution across Europe, a cost-effective infrastructure for lifelong learning and easy access to the content of the virtual networks. They also support students at all levels of formal education."

In 1998, the European Parliament adopted a "Resolution on the role of libraries in modern societies". This document, approved at the highest political level in the European Union, recognises the roles of libraries in education and specifically in supporting lifelong learning.

- "Libraries at schools and other educational establishments provide support for education as an increasingly important element in their own communities, given that schools are adopting teaching methods based on learners searching for knowledge independently; these methods are also characteristic of the growing sector of adult education, so that libraries are also a vital support service for lifelong learning,"

These documents indicate that at international level the roles of public libraries in the knowledge society and in lifelong learning are widely accepted. It should be

emphasised that this acceptance goes well beyond the professional level, and indeed involves the highest political levels, such as the European Parliament and the European Commission.

### 6.3.3. The U.K. perspective

In the United Kingdom, the provision of services to learners by public libraries has been identified in diverse studies and reports. Hull (1999) and Broady-Preston & Cox (2000) agree that there is nothing really new in the fact that libraries act as learning organisations. Usherwood (1989:9) wrote:

"The investment in education has long been a major one on the part of the public library service (...) the public library has developed as every person's university, providing a complement to the formal education system and a major support to part-time education."

Greenhalgh, & Worpole (1995), following up "Borrowed time", a major research conducted by Comedia, concluded that

"It is clear that the public library offers many advantages as a base for such schemes [open learning]". Many students we interviewed felt 'at home' in the library, coming to use the packages to fit in with their own work or domestic timetables, and without what they regard as bureaucracy of formal education."

The report "Reading the Future" (Great Britain, Department of National Heritage, 1997) suggests that "many people turn to public libraries when retraining or changing direction in life" and acknowledge that

"Libraries also play a major role in the Government's Open for Learning programme. They provide study material and form close links with colleges to ensure that tutorial support and teaching are available."

Lifelong learning in general terms and the roles that public libraries have in it gained a whole new dimension once a new Labour government came into office in 1997 with education as one of its most cherished priorities.

Following up the Green Paper *The Learning Age* (Great Britain, Department for Education and Employment, 1998), a set of initiatives were designed with the general purpose of transforming Great Britain into a learning society. Amongst these

initiatives are the National Grid for Learning and The University for Industry. *The Learning Age* considers that

"The public library service holds an enormous range of educational material and has the potential to deliver information and learning to people of all ages and backgrounds, right across the country."

The publication of *New Library: People's Network* (Great Britain, Library and Information Commission, 1997) marks a turning point in the way the British Government deals with libraries, and more specifically with public libraries. A catch phrase emerging from this renewed vision of public libraries describes them as "street corner universities". (Hall & Curry, 2000: 85) The vision of *New Library: People's Network* (Great Britain, Library and Information Commission, 1997: 2) could hardly be more explicit:

"Public libraries complement formal education provision by providing a resource base and a platform for people of all ages to participate in lifelong learning. They will therefore form an integral part of the National Grid for Learning and The University for Industry, and the implementation of the network should consider this a priority."

Diverse authors have also called attention to the roles that libraries play in this field. Craven (2000:228) stated that "The concept of lifelong learning is becoming increasingly important in the provision of library services". Batt (1998) also mentions these roles, focusing specifically on unintentional learning: "Public libraries are unique in the way that they can allow those tiny portions of learning to invisibly change people's lives." This same author (Batt, 1998a), also stressed the idea that lifelong learning is nothing new in public libraries, on the contrary it has been at the very heart of the public library movement. He raises interesting points on the way that the public library is considered by the educational sector as far as lifelong learning is considered.

"I have listened to speakers who have spoken highly of the role of the public library as a component in the lifelong experience, but within the context of tutoring, assessment, qualification and progression. All things associated with existing learning models."

The role of public libraries in unintentional learning is thus again emphasised, and the author warns against the "danger of lifelong learning being hijacked by the

education sector in a way that detracts from the diversity of learning experiences that public libraries have always hosted." Williamson & Wallis (1998: 260), echoed this concern, considering that "public libraries are in some way, the poor relation, at least as far as lifelong learning goes."

A study produced on behalf of the Bertelsmann Foundation (Poustie, 1999) looked at the role of libraries in lifelong learning, focused mainly on British and Australian public libraries. Whilst considering an enlarged concept of lifelong learning, admitting that "learning is something that most people do every day", and often "do not even think of as lifelong learning", the main focus of this study is on the opportunities provided by information technology.

Watkin (1998:149-150) argues that public libraries have "an enormous potential to contribute to the learning society and community through supporting open and distance learning and learners" due to several features, which are unique to them: location and accessibility, customer friendliness, a wide range of support materials, a non-educational study environment, and the availability of support by trained staff.

The fact that the Library Association has published guidelines for the support of libraries to independent learning suggests the growing attention of the profession to this issue. These guidelines recognise that learning is "a lifetime experience" and recommend (Bamber, 1992: 72) that "Library services, whether industrial, commercial, academic or public should accept involvement in adult independent learning services..."

A report from the Council for Education Technology (Smith, 1988) identified the needs of adult independent learners: information, materials and facilities, guidance and support. According to PLAIL, a European Union funded project, the response of the public library to these needs is constituted of the provision of information, study materials, facilities and equipment, counselling and support.

#### **6.3.4. Rhetoric and realities**

Early in this chapter the different visions of Portuguese public librarians and elected members of the roles played by public libraries in lifelong learning were introduced.



This section addresses the practicalities considered to be important for the prosecution of those roles.

### **A) "Animation" activities**

The data from this study indicate that public librarians and elected members in Portugal consider programming and "animation" activities as very important for lifelong learning, and indeed give them much attention and resources.

This should be considered in the context of what has been discussed earlier, i.e. the fact that unintentional learning is dominant when Portuguese professionals and politicians discuss lifelong learning. The organisation of diverse cultural activities is predominantly seen as supporting lifelong learning.

*I think that that is inherent to everything the library does... with training sessions, with the conferences, with the talks we have on diverse matters along the year. We have a biologist... For example we have an art exhibition in the foyer, and the painter, the artist has a very special technique. We gather a group, we invite people and the artist to demonstrate his technique. This is a way of providing lifelong learning. I think that all the work of the library links with lifelong learning and I think it is very important. It is a part of our daily work.*

(Librarian, small town, Central region of the country)

*Weekly, during the summer, on Wednesday or Thursday, we have been having discussions on the most diverse subjects. For a period of time, that was last year, every week a book was discussed. Somebody would volunteer to read a book, introduce and talk about it, and then the discussion widened amongst the audience. That was known as "Café with letters", because it was after dinner, about nine o'clock in the evening. And it would last up to eleven o'clock.*

(Councillor, medium sized town, Central region of the country)

Elsewhere, these kinds of activities are more commonly found in the literature, associated with promotion, outreach or extension services. Their purpose is either to bring new users to the library or to reach special groups of users that are somehow disadvantaged due to reasons such as language or distance from the library. Hasson (1996:156-157) mentions activities in Scottish libraries, ranging from theme events on subjects such as circus workshops to women's events. Others aimed at an adult audience are Elvis nights, instruction to storytelling, car repair workshops, home winemaking and DIY sessions. De Saez (1993) also includes exhibitions,

displays, talks and open days in the marketing mix aimed at the promotion of the library.

The literature on lifelong learning and public libraries surveyed for the present study (e.g. Brophy, Allred & Allred, 1996; Bamber, 1992; Clwyd County Council, 1996), and which constitutes the core theoretical framework for this issue, does not include these activities amongst those concerning lifelong learning. However, an American author (Van Fleet, 1995) does acknowledge their relevance for learning.

"Programming for all groups is a popular service in many libraries. These programmes cover a wide variety of topics and have different purposes and expectations, and audiences will vary: lecture programs may provide information on daily living topics from low fat cooking to investment information to family relationships. (...) Book discussions stimulate intellectual activity and social interaction..."

Comparing the data from the interviews with the literature suggests different approaches by Portuguese librarians and elected members to the issues of "animation" activities. Whilst the Portuguese data place activities at the centre of the provision of support to lifelong learning, the literature tends to consider such activities as a set of marketing strategies and a way to reach new users, and generally does not consider them as lifelong learning.

### ***B) The provision of information***

The respondents to the present study identified the provision of information in general terms, and specifically in supporting lifelong learning as a major role of public libraries.

However, this is a domain of convergence of diverse perspectives where the differences between intentional and unintentional learning are more visible. Another issue is the distinction between information for learning and for general life purposes. As in previous sections, unintentional learning was much more present in the responses to this study.

*On the other hand, even by consulting the periodicals... this is also education when people are informed about their day-to-day. Increasingly we cannot conceive education if people are not informed about daily life.*

(Councillor, small town, South of the country)

*It is important that the library gives support by providing information on whatever media.*

(Librarian, small town, Central region of the country)

The provision of information for study was illustrated by the following response.

*We are always learning, and we are always trying to obtain more and more. And at home we cannot afford to have all the information. So I think that for us, the library is the ideal place for us to search for what we need. The information, the new books that come up, studies that are being made all the time. That is why I find that support to self-learning is very, very important.*

(Librarian, medium sized town, Central region of the country)

One response exemplifies a high level of awareness of library roles in education, and indeed considers an advanced role for the public library, not only as a provider but also as a producer of information.

*I think that the library must create other information resources and must support self-study and open learning courses. I do not see any reasons why it should not do so, and that is why I think it is important, and also because it is a way of attracting other members of the public.*

(Librarian, medium sized town, North of the country)

The provision of information for other specific purposes also emerges in some interviews and is illustrated below.

*I think that the library has a very important role, especially now that there is a stock exchange fever. There are people that come here just for that, they come to see how the rates are, to check on their small investments, if it has gone up or down, they make lots of photocopies...*

(Librarian, medium sized town, North of the country)

When discussing the information needs of learners, a distinction has to be made between two kinds of information. One, more generally, may be considered as the raw material for study, associated with the subject matter. Another kind is information about education itself, for example educational opportunities.

Whilst the provision of information for educational purposes, at both intentional and unintentional level, emerges clearly from the interviews as a role for public libraries, information about education is virtually absent in the responses to this study. This is in sharp contrast to some of the roles considered in much of the literature.

Fisher (1988), for example, identified a set of information needs of adult learners that may be met by the public library. Students need:

- Bibliographical information;
- Information about self-instructional or open learning materials;
- Information about audio-visual materials;
- Information about broadcasting and broadcast-related materials;
- Information about local organisations;
- Information about education and training opportunities.

The Library Association guidelines address this issue, including it in the general activities of educational guidance. Bamber (1992, 21-22) specifies some of the ways in which this information may be obtained and presented.

"Information about learning opportunities is provided from leaflets and brochures produced by local education authorities, colleges, universities, voluntary and commercial organisations, and from computer databases on education and training opportunities."

The PLAIL project identified the information needs of adult independent learners that may be met by the public library. PLAIL found that learners need information on the availability of courses and on their relevance to the job market, on funding, course fees and cost of materials, availability of suitable materials for study, level of study within courses, and qualifications obtained with these courses.

The UNESCO Manifesto defines the public library as "... the local centre of information, making all kinds of knowledge and information readily available to its users". This influential document goes on to consider that "... ensuring access for citizens to all sorts of community information" and "... providing adequate information services to local enterprises, associations and interest groups" are amongst the key missions of the public library.

The fact that information about education is absent from the responses as well as the frequent consideration of newspapers and magazines as information sources for learning reinforce the idea of a predominant conception of lifelong learning distinct

from what library users demand if they need to follow an accredited course of studies.

### **C) Counselling and support**

The responses to the present study do not provide data about the possibilities of learners having support from library staff in their studies. The following statement illustrates why this is the case:

*I don't think it would be easy. For that purpose [support to open learning], the library would require more specialised staff in diverse areas, able to give support in a project like that.*

(Librarian, small town, Central region of the country)

Contradictory to this idea, the literature is quite clear about the special importance and the strong need for counselling and support from lifelong learners. The PLAIL research (Clwyd County Council, 1996: 38-39) addressed the issue and concluded that:

"Counselling, in the form of guidance and advice [is] an essential and significant aspect of the service a public library should offer adult independent learners.

(...)

"Giving support to adult independent learners during their studies is equally important. This support should be given in the form of instruction in the use of PCs and other technology relevant to the needs of adult independent learners; support material to accompany course; study skills support; arranging access to tutorial support; feedback and evaluation of courses; providing help with dealing with agencies which provide education or training."

The Library Association Guidelines (Bamber, 1992) dedicate a full chapter to educational guidance, and detail several aspects this may assume: informing, advising, counselling, assessing, enabling, advocating and feeding back.

The ODIN report (Brophy, Allred & Allred, 1996: 54) also addresses the extent to which educational guidance, tuition and external assessment is incorporated in open and distance learning, and concludes that "a learning library needs to think in terms of supporting learning rather than simply delivering materials." This report also found that the provision of space for enabling student meetings, the organisation of



classes and helping learners in finding tutorial support are other aspects of library support to learners.

All these features of counselling and support were virtually absent from the responses to the present study, confirming thus the limited visions of library support to lifelong learning

#### ***D) Resources for lifelong learning***

The question of library resources in general will be discussed at length in Chapter 9 on managerial issues, but those more closely associated with lifelong learning are briefly addressed in this section.

##### Space and facilities

In a sense, the whole of the library facilities may be seen to fulfil the lifelong learning needs of the community. This is reinforced by the fact that the library is a public service, hence open to all members of the community.

Auditoriums and exhibition rooms emerge from as the most obvious spaces in the library that may be used to support learning, especially when it comes to the use by groups or for activities. But most spaces may be considered: the audio-visual sections provide viewing and listening facilities and include educational and training materials; the periodical sections and the local studies sections, as shall be discussed below, are especially considered as playing important roles in lifelong learning. However, the respondents to this study did not consider it important that the library should have space for meetings of independent learners or for tutoring. Items which the literature considers key requisites to support purposeful learning activities.

##### Books and materials

According to the responses to this study, newspapers and magazines emerge as one of the most popular sources for learning, and they are much used by older adults. This is illustrated by the following responses:

*I think that the library must give people those resources and must accompany them throughout life. Even the simple newspaper, the fact that they come and read the paper everyday, I think it is a part of that everyday*

*learning. And this section is frequented more by those not so young.*

(Librarian, medium sized town, North of the country)

The fact that newspapers and magazines are so popular is also seen as a means of attracting users to the library and introducing them to other activities.

The materials in the local studies collections are also considered as playing an important role in lifelong learning.

*This occurs a lot with the local studies collection, everything that has to do with our town. Now their interest for this is very high because here they saw things that broadened their knowledge about our history as a town, about our place at national level, and what we are in history.*

(Librarian, medium sized town, North of the country)

Books, both fiction and non-fiction are seen as a major source for learning, both intentional and unintentional. The following statement illustrates this widespread belief.

*For those members of the public that are engaged in self-learning (...) when the library allows for them to come and borrow books for self study, it is very, very important.*

(Councillor, small town, Central region of the country)

The present research did not specifically try to elicit the respondents' opinion on the materials that the public library should provide for lifelong learning. However the spontaneous allusion to the materials mentioned above may suggest that they are intuitively considered adequate for lifelong learning, whilst learning packages and audio-visual materials are virtually absent from the responses. This is in contrast to the literature, which advocates specially designed materials as the most suitable to meet learners' needs (Clwyd County Council, 1994; Bamber, 1992 and Brophy, Allred & Allred, 1996).

### Information and Communication Technology

The responses to this study suggested a will to embrace the use of ICT in lifelong learning in the near future, but at present its use is limited.

*Libraries are increasingly becoming pilot centres, or centres for learning about computers, with multimedia equipment, with the Internet, with all the*

*world of new technology that is emerging, and libraries are becoming the focal point of all that.*

(Librarian, medium sized town, South of the country)

*On one hand, we must turn to the new technologies, we must take into account scientific and technological knowledge, the courses available in our town, and we have to do work for the virtual library, that is the way forward, I have no doubts about that.*

(Librarian, medium sized town, south of the country)

The IPLB guidelines (Portugal, IPLB, 1999) specify that a number of computers and one printer should be assigned to the purpose of open learning. This number could go up to 6 in the larger libraries. This suggests an awareness of the importance of the public libraries using ICT for lifelong learning at the highest strategic level. There are thus, some reasons for expecting important positive developments in this field.

The literature on the use of ICT for learning is constantly growing. This is a fast evolving field and it is apparent that it was only during the 1990's that ICT, in particular the use of the Internet, attracted the attention of authors and researchers. A clear indication of this is the fact that the Library Association guidelines, (Bamber, 1992) consider ICT only marginally, and as a matter of fact do not use the expression. However it acknowledges that "... the most sophisticated packages make use of computer-based interactive video lessons, while the use of computer programs generally is fairly common", but omits the then new possibility of using the Internet. What today could be considered an equally limited vision of the possibilities of ICT in this field may similarly be found in Fisher (1988).

New perspectives emerge in *Reading the Future* (Great Britain, Department of National Heritage, 1997: 10) which highlighted the opportunities brought about by ICT, and may be found in projects such as Electronic Access to Resources in Libraries (EARL) (Dolan, 1997) and Croydon Libraries' Internet Project (CLIP) (Kirby, 1997). The use of ICT and more specifically the Internet was at the core of both projects that also include components associated with lifelong learning.

The New Library Report (Great Britain, Library and Information Commission (1997) states that:

"Networked resources also offer opportunities for adults to follow a personal learning path, whether in support of a career or an individual interest. In partnership with schools, colleges and universities, the public library will allow flexibility of study in both time and place."

The ODL report (Brophy, Allred & Allred, 1996) identified a wide range of technological systems used in delivering open and distance learning across Europe. These include computer-based learning, interactive video, computer conferencing, electronic mail, multimedia (including networked CD-ROM), interactive telematics systems and virtual reality.

The new IFLA guidelines for public libraries incorporate most of the ideas that have been discussed so far and very clearly advocate the use of ICT in public libraries for distance learning.

"The development in distance learning and its increasing reliance on the Internet is having an impact on the public library. Distant learners, studying at home, are likely to make use of their local library as their primary source for material. Public libraries play an increasingly important role within the educational network and should provide space and access to materials to meet this demand. "

Many of the ideas expressed by the respondents to the present study about the use of ICT for learning purposes in public libraries could be considered as bringing a dimension of hope in future developments rather than being a testimony of existing services. However, alongside with progress identified by the literature, a willingness to embark on technological developments is very apparent and there are good reasons for expecting a positive evolution.

### Staff

From the interviews, the provision of services for open and independent learners emerges as hindered by staff shortage as well as a lack of training for this specific purpose.

*Independent study and self-learning would require some diversity in documentation and a diversity in the way the staff deals with and presents that information. That would oblige the staff to change some schemes that are learned in the schools, where they learn the classical things. They are not used to a different posture, I mean, not just to be waiting for people to come to them, or just limit themselves to having the books on the shelves. It*

*has been hard to convince them that they must "dynamize" the documentation they have.*

(Librarian, medium sized town, Central region of the country)

It is generally acknowledged that at least some aspects of lifelong learning require strong levels of support, advice and guidance, as well as specific information. Hence staff related issues have been frequently raised and discussed in the literature.

The Library Association Guidelines (Bamber, 1992) consider three levels of competence for library staff in assisting adult independent learners: awareness, information and full service delivery. PLAIL identified with great detail the skills and competencies required by librarians to support adult independent learners. These are presented in six categories: counselling (advice and guidance), information, appropriate study materials, facilities and equipment, support and marketing. This issue will be discussed in detail in chapter 9, but for the moment the negative impact of the scarcity of human resources on the support to lifelong learning in Portuguese public libraries should be acknowledged.

### 6.3.5. Discussion

The previous section identified and discussed the practicalities needed to support lifelong learning in public libraries. The data help to clarify the predominant conceptions of lifelong learning amongst the respondents. The main characteristics of these conceptions may be summarised as follows:

- A strong emphasis on "animation" activities, as being at the core of the provision of support services to lifelong learners;
- A partial consideration of the information needs of learners, with emphasis on general and subject information, and a virtual absence of information about education;
- Counselling and support are generally not considered as roles for libraries, and the skills for these roles are placed with the teaching profession;
- The resources associated with lifelong learning are generally characterised by informality and looseness.



- (i) When considering space and facilities, great importance is placed on auditoriums and exhibition rooms and little importance on spaces for study or tutorial activities;
- (ii) When considering books and materials great importance is placed on newspapers, magazines and books (fiction and non fiction) and little importance on study packs and audio-visual materials;
- (iii) An uneven but generally low level of ICT was identified, although there were high expectations for the near future;
- (iv) A general shortage of staff and lack of skills associated with the support to lifelong learning.

The model of lifelong learning emerging from these perspectives is essentially what has been previously identified as "unintentional learning". It does not generally take account of more structured dimensions of lifelong learning previously referred to as "purposeful learning". It is thus a partial and incomplete model if compared with most of the references found in the education and library literature and practice in other parts of the world.

The reasons for this may be found in Van Fleet (1990:202) who has identified four basic obstacles that may prevent effective participation of public libraries in lifelong learning. These are:

- A) Librarian's reluctance to assume a non traditional role;
- B) Poor public perception of the library's function;
- C) Lack of resources;
- D) The absence of an underlying philosophy

This framework may be useful for a better understanding of the situation identified above. Although some nuances relating to the Portuguese specificity were found in the data, it may be safely suggested that these issues have an influence in the perceptions of Portuguese librarians and elected members. However, a fifth issue that could not have been referred to by Van Fleet was identified in the data:

E) Lack of tradition of open and distance learning in Portugal.

### **A) Reluctance to assume a non traditional role**

Many respondents to this study considered that supporting learners would raise some problems, as they believe that it would require pedagogical skills lacking amongst library staff. This is illustrated by the following response.

*I think that the support to self-learning may not be left to anyone's criterion. It has to be done by a pedagogue. That would imply that libraries should have a pedagogue, and I am not sure if that situation would be justifiable.*

(Councillor, medium sized town, Central region of the country)

Another perception found in some responses is that some of the work of supporting learners overlaps to a degree with the role of teaching, and thus should not be attempted by librarians as this would mean an interference in fields where they are not prepared to work. In the words of one respondent:

*I think that the library should not assume roles that belong to other institutions, namely, the school. I find it dangerous to follow that path, I think it is risky that we try to exercise pedagogical competencies, because we do not have them. We should not try to do things that we do not know how to do.*

(Librarian, medium sized town, Central region of the country)

This idea echoes Van Fleet's suggestion (1990: 202), that

"librarians tend to be uncomfortable with a role that requires advising and counseling... the profession tends to accept services that require a minimum of involvement and interaction".

Poustie (1999:29) clarifies the roles of librarians in lifelong learning distinguishing them from teaching roles.

"Whilst librarians will never replace the role of and specialist skills of the teacher, educationist or academic, they will increasingly be forming strategic partnerships with the education network to enhance the opportunities for learning in the public library. Public librarians just need to be alert for these opportunities."

One of the conclusions of the ODIN project (Brophy, Allred & Allred, 1996: 30-31) confirms some ideas identified in the present study and may help to explain the

perceptions of the respondents. It also raises some concern about the future of public libraries in structured forms of lifelong learning:

"Librarians, however are very poorly informed about ODL itself and fail both to recognise the significance of what they are doing and to make the case to ODL experts for continued, planned and systematic involvement. "

The statement that "the profession tends to accept services that require a minimum of involvement and interaction" does not fully apply to the picture emerging from the data, as the tasks associated with "animation" do not necessarily fall in the category of a traditional role. However it is very apparent that there is a reluctance of public librarians in Portugal to accept, at least some, aspects of the new roles: those that, rightly or wrongly, they associate with teaching.

### ***B) Poor public perception of the library role***

Chapter 2 of this study presented an overview of the changes taking place in Portuguese public libraries since the 1980's. That chapter also gave notice of a change in the general social perception of the public library and gave examples of reports published in the media acknowledging the changes taking place in this field.

However, these changes in public opinion have to be put into perspective. Public libraries are praised for general and basic features, such as the fact that users may borrow books, that there is free access to the stacks, that they have children and audio-visual sections. These were really important improvements considering the previous state of affairs and really made an impression, especially in the more cultivated sectors of public opinion.

However, a detailed, critical, informed and generalised opinion of the diverse roles of public libraries has yet to emerge. This can only be born and develop alongside with the development of the libraries themselves. For the time being, there is a widespread lack of awareness of the roles that public libraries may play beyond the basic service of book lending or the "animation" activities.

The data obtained for the present research provided several examples of the feelings of librarians and elected members about this, as is illustrated by the following statements.

*The library we are talking about is very recent. I remember that when the rooms were empty, very often I was asked what I was supposed to do in such a big building. It was even suggested that other services from the municipality should use this space. It was complicated to sensitise people to this work and the aims we were considering for the library. I think this work has to be done as the community understands the important role the public library may play. But that is not yet clear for many people. And that raises some difficulties.*

(Librarian, small town, Central region of the country)

*One of the constraints is the lack of public awareness of what a library is. I could give an example of a conflict we had recently in our town. We had to choose a building either for a library or for a school. The community was largely in favour of the school, that would be built anyway, only a little more far away.*

(...)

*We have people complaining that a certain road is not properly kept and has holes in it. But nobody demands more books for the library.*

(Councillor, medium sized town, Central region of the country)

*There is not yet a good understanding at a social level of what a library is really about. And many people, at all levels, all ages, have a completely outdated idea of what a library is.*

(Librarian, medium sized town, South of the country)

Librarians responding to this study raised another important issue. That is the lack of sensitiveness of elected members to the roles of libraries. The lack of resources allocated to the library within the general budget of the municipality, the few times the library is visited by elected members or their complete absence, the unavailability of elected members to discuss matters with librarians are examples given by respondents to illustrate this.

*When I need to buy something, to develop a project, it is always up to the President. Then I have to spend a week or a month after him. And he is always very busy, and it is very difficult to get to talk to him. The value he attributes to the library may be measured by this. In this council, every week there are meetings with people in charge of the different sectors. But, as far as I am concerned, if I don't go and ask for this and that, I may as well have to wait for years to get what I need. He may let a full year go by without even asking if the library still exists, what am I doing down here? I might as well be sleeping all day in this sofa and let all my staff go on permanent leave, that he would never notice ... I think there is this general feeling among public*

*librarians, I am not telling that all the librarians in the country have this feeling, but I am convinced that many feel like me.*

(Librarian, small town, Central region of the country)

### **C) Lack of resources**

Chapter 9 of this research will discuss in detail the views of librarians and elected members on the managerial issues affecting the educational roles of public libraries. It is apparent that, in spite of the developments that have occurred during the last 15 years, public libraries in Portugal suffer from lack of resources, including staff, finance, space, materials, and ICT. These views are supported using data from previous research, such as the Millennium Study (LibEcon 2000). This European Union funded research acknowledged all the positive developments taking place in Portugal, but still included this country amongst those with the smallest investments in public libraries.

The lack of resources may influence the perceptions of the respondents to the present research, as suggested by Van Fleet (1990), and contribute to a limited perception of the roles of public libraries in lifelong learning. Previous sections of this chapter suggested the importance of support and counselling for lifelong learners, and these functions can only be played with an appropriate number of staff. ICT is a growing relevant issue in lifelong learning, and without the appropriate equipment public libraries will not be able to support learners. Equally, libraries need space for tutoring and meetings of students, and that space is not presently available in Portuguese public libraries.

This research suggests that, lacking appropriate resources, the idea of lifelong learning adopted by the respondents tended to consider the aspects of the work that may be carried out with the resources available, and these are associated with unintentional learning.

### **D) The absence of an underlying philosophy**

Public libraries have been subject, especially in recent years, to diverse and sometimes contradictory pressures from diverse sectors of society. The fact that they are open and inclusive organisations (Greenhalgh & Worpole, 1995: 36), trying



to respond to all the requests placed upon them, originates a diversity of functions and a reactive behaviour.

The simple and traditional statement of roles, as being of information, education, culture and leisure, is of itself conducive to very diverse and potentially contradictory activities. Public libraries lend books and provide information, host activities for a great number of diverse publics, safeguard local cultural heritage and provide services for increasingly multicultural users. Their stock is constituted of ancient and recent printed, audio-visual and electronic materials, their users range from children and young adults to older adults and housebound, from the illiterate to university students and researchers. The IFLA/UNESCO Public Library Manifesto is in itself a condensed abstract of this diversity of roles and functions, services and users.

Considering these characteristics and a permanently evolving environment it is no surprise if there is some disorientation amongst librarians about what their roles really are. As the Comedia report (*Borrowed time?*, 1993:20) stated:

“Part social worker, part information analyst, part commercial entrepreneur – it is no wonder that many librarians are experiencing an identity crisis.”

Considering the specificity of Portugal, it should be noted that the profession of public librarian is relatively new and has few members, in spite of the fact that its number is rapidly increasing (Freitas, 1998; LibEcon, 2000).

It has been suggested that the education of public librarians in Portugal, and library professionals as a whole, does not meet the needs of the new, diverse and evolving demands placed upon them. The present research shall discuss this issue later regarding managerial issues. Associated with education, library research in Portugal is virtually non-existent, except for some isolated attempts, with very poor or no institutional and financial support. An author (Barrulas, 1999: 60) summarised the situation as follows:

“Since Library and Information Studies are not an autonomous and fully accepted field in Portuguese Universities, and none of them actually has a Department, School or Faculty exclusively dedicated to this field of knowledge, it is easy to infer that research and development activities are nearly non-existent.”

The guidelines issued by IPLB (Portugal, IPLB, 1999) are very general, and indeed are aimed at supporting local authorities in planning and building the library, with very few references to the management and structure of the services. Although space for open learning is considered, no guidelines are provided for its operation.

The present study suggests that the roles of libraries in supporting lifelong learning have not yet gained a status in library theory in Portugal, and this fact clearly influences the perceptions that librarians and elected members have of those roles.

### ***E) Lack of tradition of open and distance learning in Portugal***

Some responses from librarians, although agreeing with the general idea of the involvement of public libraries in lifelong learning, identified some problems that may make it difficult for the library to play these roles. The lack of tradition and the need of certification are amongst them.

*This is very important but it does not translate much to the reality of our country. We are very acquiescent and the teacher is still a tutelar character. No one considers being able to learn by himself. And there is the problem of the diploma: who is going to give the diploma? This sometimes discourages people from learning some things if a diploma is not awarded in spite of having the same competencies.*

(Librarian, medium sized town, South of the country)

Another major issue from this data is the lack of training packages on the market.

*We have the problem (...) of what is available on the market for that. For instance, as far as open learning is concerned, there are problems in our market because of the shortage of training packages. Even if we develop the service with resources that we may create, we have some limitations.*

(Librarian, medium sized town, Central region of the country)

Brophy, Allred, & Allred (1996:104) provide information about the situation of open and distance learning in the member states of the European Union. This lack of tradition in Portugal is quite apparent, when they indicate that “the Universidade Aberta (Open University) provides distance education courses, but largely in the field of teacher education”, and that “no examples (outside PLAIL) of ODL in public/municipal libraries have been identified.” The situation of the Open University

in Portugal has evolved since these data were obtained, but its influence remains limited. The PLAIL report confirmed this lack of tradition.

"Indeed, as a result of the comprehensive research undertaken, it may be concluded that no study or research has been conducted relating specifically to adult independent learners in Portugal

(...)

"It may be concluded that there is a distinct lack of tradition of adult independent learning in Portugal and a consequent shortage of provision of information, and of actual experience in dealing with adult independent learners."

### ***F) Where are Portuguese public libraries?***

The ODIN report (Brophy, Allred & Allred, 1996) suggests that open and distance learning covers a wide range of activities and libraries may be positioned somewhere along a continuum (Table 7). The position occupied by libraries in that continuum may denote whether they are acting as a mere "collection of books" or as "a learning centre". In other words, this continuum may help to access whether a library is fulfilling its role in lifelong learning.

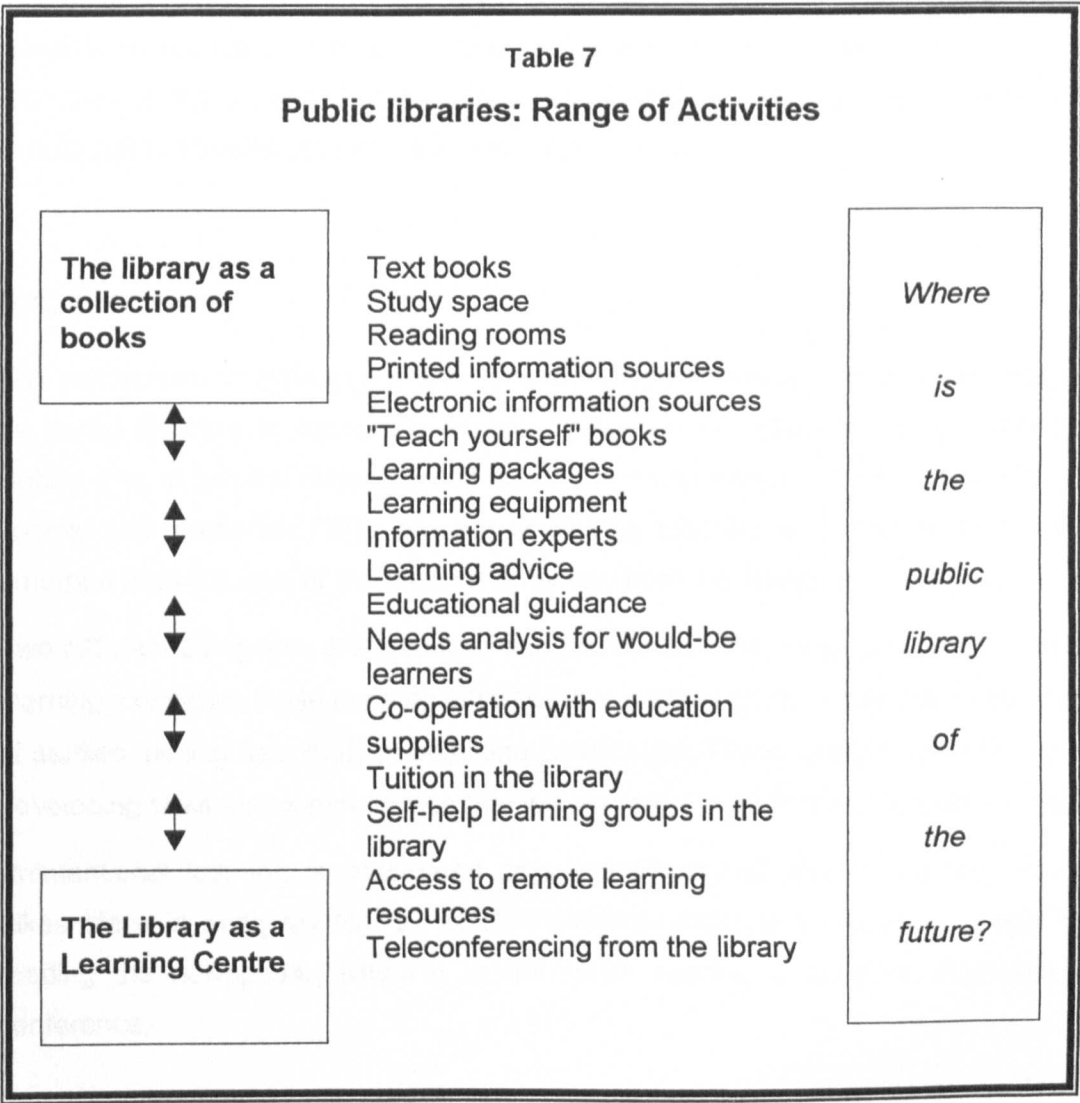
The data of the present study indicates that:

- The conception of the library role in lifelong learning amongst Portuguese librarians and elected members is dominated by the idea of delivery rather than support. Looking upon the continuum, items such as "information experts", "learning advice", "educational analysis", "needs analysis for would be learners", and "tuition in the library" are only marginally considered or not considered at all.
- The items associated with resources are considered important but, as was suggested earlier in this chapter, Portuguese public libraries are generally short of resources, be it space, staff or ICT. This means that items as "teleconferencing from the library", "access to remote learning resources", or simply "study space" and "reading rooms", although being considered by the respondents as important, may not be available.
- Since the predominant conception of lifelong learning amongst the respondents is that of unintentional learning, the resources and activities that they associate

with it are quite different from those mentioned in this continuum, and consequently Portuguese public libraries do not really fit in this model.

- However, the ODIN framework may also be considered partial and limited. Indeed, it does not incorporate important aspects of lifelong learning, and even of open learning: those identified in the data of this study and in the literature as consciously or unconsciously leading to individual improvements but not necessarily aimed at accreditation – informal or unintentional learning.

Van Fleet (1990: 2000-202) suggests a five-interval continuum for service provision and professional attitude, moving from traditional and passive to a non-traditional



In Brophy; Allred, & Allred, (1996: 33)

and active stance. The lowest level of service is the “simple provision of support materials for the independent learner”. A second step along the continuum is characterised by library “support services for the education activities of other agencies”, followed by “independent learning programming for groups”. Libraries in the fourth grade of this scale will support lifelong learning by providing “readers’ advisory services and educational brokering”. The deepest involvement of libraries in lifelong learning would imply a “collaborative approach to the independent community learning centre.”

Van Fleet presents a conception of lifelong learning that is more encompassing than the one used by ODIN, including programming activities (along the lines of the Portuguese “animation”) in the support to lifelong learning. Portuguese public libraries would then be better placed in this continuum, and although not all the activities of the second phase would be considered, the importance of “animation” would easily allow for an inclusion in the third interval.

## 6.4. Summary

The perceptions of Portuguese librarians and elected members on the roles played by public libraries in supporting lifelong learning were discussed in this chapter. Before that, a general discussion on lifelong learning and its importance in today's society was presented. The concept of lifelong learning is discussed both as it emerges from the data of the present study and from the literature.

Two different categories are identified and discussed. One, deliberate or purposeful learning, considers those learning activities that follow a more or less structured plan of studies, aiming frequently at obtaining certification. These learners usually aim at developing skills and competencies that will be useful in their social and work lives.

Unintentional learning is considered as a non-structured way of learning, which takes place in everyday life, by which individuals improve themselves, simply by reading the newspaper, listening to the radio, reading a book, or attending a conference.



In any of these cases, but with an obvious emphasis on the first, during the last decade, lifelong learning came to the forefront of the political, social and economic agenda in Europe. This renewed importance of individuals being learners throughout their lives has its origin in several factors. These include changing patterns in the economy and society characterised by a strong mobility of the workforce, the increasingly widespread use of Information and Communication Technology, and the growing importance of pedagogical theories that emphasise individual processes and learning how to learn.

Public libraries operating in this environment have been rediscovering the established role of supporting learners. By doing this they are also reshaping themselves in order to respond to increasingly diversified demands in terms of their resources, services and activities.

The present research suggests that the most common conception of lifelong learning amongst Portuguese librarians and elected members does not include important aspects of current practice in other European countries, namely those related to purposeful learning. This is indicated by several categories that emerge from the data and are confirmed in the literature:

- The emphasis placed upon “animation” activities;
- A narrow notion of information provision for education;
- The absence of counselling and support among the functions associated with lifelong learning;
- The kinds of resources that are considered as important for lifelong learning.

This research suggests that this partial consideration of lifelong learning is due to a set of circumstances, associated with the environment in which public libraries operate in Portugal and with the special historical circumstances of the development of public libraries in that country. Namely, it should be pointed out that the Public Library Network, following internationally accepted parameters, only has had a real existence since the late 1980's.

Considering this background, the present study suggests that the predominant conceptions of lifelong learning amongst Portuguese librarians and elected members are influenced by a set of conditions:

- A reluctance of librarians to assume non traditional roles;
- Poor public perception of the library roles;
- Lack of resources
- The absence of underlying philosophy of the roles of libraries in lifelong learning;
- Lack of tradition of open and distance learning in Portugal.

Portuguese public libraries may be presently considered as playing a role, as yet partial, in lifelong learning. However, the model emerging from this research suggests that predominant conceptions and practices do not fit into a European framework as the one presented by ODIN, a European Union project. Nevertheless, this research also suggests that this model too lacks important dimensions of lifelong learning: those associated with unintentional learning that are predominant in Portugal.

The perceptions of librarians and elected members are an important part of that model. They are the result of a set of specific conditions and simultaneously are highly influential in the development of services. They are crucial for the kinds of roles public libraries will have or not have in the learning society.

Chapter 7

THE ROLES OF THE PUBLIC LIBRARY IN  
SUPPORTING FORMAL EDUCATION

*The public library integrates itself in the school environment to make itself known, it exploits its potential and its value, it states that it exists, and is ready to co-operate in that educational building. I mean, the more means the public library provides to schoolchildren the more those children will need to use the library in the future.*  
(Librarian, small town, Central region of the country)

7.1. Introduction

Supporting formal education has been a major role of public libraries since their early days (Sturges, 1996). The Act that first established public libraries in Portugal, in 1870, was also distinctly shaped by the will to complement the action of the school (PORTUGAL, 1870).

The present chapter discusses the roles of Portuguese public libraries in supporting formal education, as perceived by librarians and elected members. Whilst many changes occurred in society, in the cultural and technological fields, it is notable that the remit of supporting education is now as important as it was at the genesis of the public library movement.

The model of a library emerging from this research is distinctly one of an educational library, in the sense that one of its central purposes is to support formal education. This kind of library is seen as indispensable for schoolchildren to gain access to a wealth of books, ideas and support that otherwise would be much more limited. The roles of the public library in supporting formal education are still more relevant in

Portugal due to the poor provision of library services in schools and the inequality of access to information by children socially underprivileged.

After considering the benefits gained by school children's use of the public library, this chapter goes on to discuss other kinds of indirect support, such as that provided to school libraries and to teachers. Students in universities and other higher education institutions are another group of users identified in this study as being beneficiaries from public library support.

The chapter concludes with a discussion of the reasons that underpin the opinions expressed by respondents. It is suggested that they should be considered in the context of their past and present relationships with the educational institutions and with the demands made upon them by the actual environment in which they operate. It is also suggested, however, that limited resources and a lack of theory on the support of the public library to formal education may negatively influence the perceptions found by this research.

## 7.2. Supporting the curriculum and promoting reading

Public librarians and elected members in Portugal share the perception that schools and public libraries are key partners in providing support to learning and curriculum development, as a source of information and as a way of facilitating contact with books and instilling the pleasure of reading in children and young people. The following statements illustrate the different ways respondents perceive these roles.

*I think that libraries have at least one important educational role at several levels, combining what is more commonly mentioned as educational: establishing relationships with the school, the contribution to learning and to curriculum development. I think that role continues to be important, particularly considering the lack of a school library network in Portugal. So the public library is important for schoolchildren. But above all it is important as a partner of the school for the development of readers that happen to be pupils at a certain stage of their lives. I think then that the school is not only one of the partners of the library, it is the privileged partner.*

(Librarian, medium sized town, Central region of the country)

*I think that the public library, as it is today, plays a very important role in education, because of its close connection with the school, providing books and materials for pupils, helping them to understand the school subjects, in*

*parallel with a set of initiatives that it may carry out in partnership with the school and that is really a complement to the school.*

(Librarian, small town, Central region of the country)

*Library work is a very specialised work, and in order to be done properly, I think it is very important that libraries and librarians give support to schools. For instance, lending books, because it is impossible for a school to have tens of thousands of books. Perhaps exchanging information about the most appropriate books.*

(Librarian, medium sized town, Central region of the country)

Other roles identified by the respondents were generally associated with what is known in Portugal as “animation” activities, which may include guided tours of the library, library education, workshops, storytelling and meetings with authors. These activities were considered in detail in chapter 5, and 6 of this study as they were seen as major contributors to individual learning. In this chapter they are considered from the perspective of the support to educational institutions.

*Every year we provide a set of guided tours of the library. All the primary schools come to the library at least once a year. During this visit our aim is user education, for them to understand how the library works, the ways to make the most of it. Of course for primary schools this is very basic. We also do that for the 10-15 year olds. We can see very good results from this in the majority of children. They learn what services they can get from the library, how to make the best use of it. If we don't do this work we will end up wasting a lot of time. After this work users feel much more at ease in the library.*

(Librarian, medium sized town, North of the country)

*I think that one of the things we do best is to support schools of all levels. Namely that support is done via visits of schools, via the support we give here to the search that pupils come and do here, but mainly through the visits that we have from schools, by the number of kids, from 6 to 14 or 15.*

(Librarian, medium size town, North of the country)

The public library was also considered as a way of providing educational opportunities outside school. Some respondents considered that children benefit from an environment that is more free and informal, and does not place the traditional demands of school on them, such as assignments and exams.

*It is no longer possible to think about education taking place only in the formal environment of schools. I think that the library is a way of supporting schools but it is also a way of providing education outside schools.*

(Councillor, medium sized town, North of the country)



The support of public libraries for schools was also considered by some respondents as a way for the library to promote itself by reaching a great number of potential users and making itself better known in the community.

*The public library integrates itself in the school environment to make itself known, it exploits its potential and its value, it states that it exists, and is ready to co-operate in that educational building. I mean, the more means the public library provides to schoolchildren the more those children will need to use the library in the future.*

(Librarian, small town, Central region of the country)

The literature about the support of public libraries to the school curriculum and to reading, albeit scarce in Portugal, widely confirms the perceptions of the respondents to the present research. The survey by Figueiredo & Calixto (1998) concluded that “the overwhelming majority of the libraries has a programme of collaboration with schools.” Amongst the more common activities of this programme are “animation” activities especially targeted at schools, workshops and meetings with authors. The research of Magalhães & Alçada (1993) provides abundant examples of such activities organised jointly by schools and public libraries.

A report produced by the Ministry of Culture (Moura, 1996), analysed the kinds of uses of public libraries and suggests that they are used more for local consultation than for lending. Relating this to the shortage of school libraries, this report goes on to conclude: “many youngsters seek the public libraries to satisfy the information needs inherent in school work” (page 10). A case study on the Public Library of Beja (Monteiro, 1999) overwhelmingly confirms the previous suggestions, and a survey of its users indicated that 69% of them use the library “to satisfy scholarly needs” (page 44). Other studies suggest that this trend may be found in other libraries elsewhere in the country (Lopes & Antunes, 1999).

The framework emerging both from the data and the literature is consistent and can be summarised as follows. Portuguese librarians and elected members share an established belief, confirmed in the literature, that

- There is a close relationship between public libraries and schools;
- Public libraries support the curriculum, provide information and foster reading for pleasure amongst children and young people;

- The provision of “animation” activities and library education are key aspects of library support for children and young people.

Reflecting the data of the present research, a study conducted by the University of Central England (Denham, 2000: 48) suggests that public libraries and schools need to be key partners. Whilst acknowledging that “the library service still needs to realize fully the potential for reaching children through schools”, amongst the respondents to this study it was found that “there was a strong feeling that the schools are and need to be key partners because of the ease and benefit of accessing the majority of children via schools. “

The consideration of the relevance of schools being key partners of public libraries echoes The Public Library Manifesto (UNESCO, 1995) which considers that “supporting both individual and self conducted education as well as formal education at all levels” is one of the key missions of public libraries. The Guidelines for Public Libraries, produced by IFLA (2000), are more specific when considering that “one of the most important institutional relationships for a public library is that with the local schools and the education system in the service area”.

The references to the roles of public libraries in providing for the educational needs of children may be found in diverse studies. For example Greenhalgh & Worpole, (1995: 90) suggest that “the potential value of public libraries in introducing children to reading and supporting their education is obvious...”. Another study (Eyre, 1996: 177), after considering diverse ways in which public libraries help to meet children’s information needs and provide support for reading skills, goes on to conclude: “Central to the philosophy of library provision for young people is to support formal and informal education”. Matarasso (1998a:8) wrote that “... library services have always had close connections with schools...” suggesting the two ways this connection is made: supporting school libraries and encouraging children to use the public library. Equally, the social audit study, conducted by the University of Sheffield (Linley & Usherwood, 1998: 20), found evidence of “close links between individual libraries and community schools”.

The Library Association guidelines for public library services to children and young people (Blanshard, 1997: 14) tend to consider children more as individual users of

libraries rather than as students integrated in schools. However, they acknowledge the contributions of public libraries to children's learning and consider what they may offer them. Amongst these contributions are:

- Assistance, guidance, interpretation, enthusiasm and encouragement from trained staff;
- A wider range of materials than home or school can generally provide;
- Use of materials, the majority of which are available for loan at no charge;
- A neutral ground between home and school for independent and unhindered discovery;
- Skills development in information handling;
- Experience of the library as an inviting place, with activities and events.

The diverse activities organized by the library to attract children and introduce them to the library and stimulate its use, with the ultimate aim of making them lifelong library users is also apparent in the literature. Denham (2000a: 74) wrote:

"Visits from institutions were perceived as vitally important in supporting children's reading. These visits provide local schools and under-fives groups with the opportunity of visiting the library to borrow books, to take part in storytelling and library orientated sessions, and to make use of the library staff expertise when selecting materials... The importance of other book-based activities, including reading, storytelling and reading games, was also acknowledged... "

The data from the present research and the trends identified in the literature are coincident in the consideration of the close relationships between public libraries and schools, as well as with the benefits obtained by schoolchildren in the fields of the support to curriculum development and reading promotion.

### 7.3. Supporting school libraries

The respondents to the present study clearly identified a close co-operation between public and school libraries as most important for a number of reasons. Generally this support was seen as bringing many advantages for the public library itself, as it

alleviates a sometimes unbearable pressure caused by the high demand of schoolchildren and students. Furthermore, it was believed that by supporting school libraries, the public library would indirectly further library and information skills, and this would result in a more efficient use of the public library service.

Focusing on the schools, on the children and on the teachers, the respondents identified a strong need for this support as it was widely considered that school libraries are very poor and lack the most basic resources. At the extreme point, some respondents simply considered that school libraries did not exist at all. The following statement exemplified this idea:

*Supporting school libraries is a very important role because most schools have not what we may call a library. If the municipal library provides support to schools it is serving a group of users in school age, and is allowing for those children to have study places, libraries that are able to meet their needs so that they don't recur massively to the municipal library.*

(Librarian, small town, North of the country)

Without going as far as considering that school libraries do not exist at all, other responses regarded them as very poor, sometimes just one room with a few books.

*What the public library can do is try to help school libraries to overcome the problem that most of them have: they are not real libraries, they are just places with a few books. They end up being mainly a room where children do other things, where meetings take place. It is a room available for many other things but for those that are supposed to be done in a library.*

(Librarian, small town, South of the country)

The support of school libraries by public libraries emerges from the responses to the present study as bringing advantages to both sides. Public libraries benefit from the fact that schoolchildren would have improved library skills if they had an appropriate library service in the school, so being more efficient users of public libraries and more likely to become lifelong library users. Schools benefit highly from the fact that children as well as teachers have an easier access to a wealth of resources that otherwise might not be available or would be more difficult for them to access.

*The users of the school libraries are potentially future users of the public library. So the co-operation is positive for both sides: for the school that opens up other possibilities for children and teachers and for the public library because it captures users that are more likely to be those users we really would like to have, I mean that use the library through their lives and*

*are good readers. That's why co-operation is so important.*

(Librarian, medium sized town, Central region of the country)

*Children spend a number of hours at school. The co-operation between libraries would be important, because otherwise that task falls on us. If they started in the first year, they would be more library educated when they come to us, they might have developed the pleasure of reading that otherwise is a task left for us.*

(Librarian, small town, Central region of the country)

Many responses identified the specific advantages that public libraries may have from providing support to school libraries. The following response illustrates the view that the support to school libraries relieved the pressure on public libraries and allowed for it to concentrate on other work, potentially more specialised and more in line with their aims.

*It is very important for us to support school libraries because it is a way of relieving the pressure we have on the public library, so that it may specialise more in other areas. A great deal of time in the public library is spent helping schoolchildren in their assignments. If there was a school library network, then this pressure would be relieved, and besides school libraries should be a node in the national library network.*

(Librarian, medium sized town, South of the country)

Some responses gave testimony of a widespread belief in local communities that the aim of the public library is mainly to provide support for schoolchildren, in other words, there is a confusion between the aims of public and school libraries. So, the support to school libraries is considered as a kind of an investment that in the end would help the public library to concentrate on its business.

*I think that a good relationship between school and public libraries is important because there has been this idea – specially when there are no school libraries – that the municipal library should function as a school library. And this is not what the public library really is for. I recall that some of the teachers in charge of those libraries have asked why is it that we do not have textbooks. I answered that that is not our role. We may have some textbooks but mainly we have books that may complement those.*

(Librarian, small town, Central region of the country)

The co-operation of public and school libraries was seen as bringing also major benefits for the latter. One of these benefits results in the transference of technical expertise, as exemplified by the following response:



*The support of the public libraries to the school libraries is important because they have the know-how of librarianship, they may support them in specialised technical work, bibliographic search, and so on. They may provide support in the implementation of an infrastructure that is just as important as the public libraries.*

(Librarian, medium sized town, South of the country)

Some even suggested that:

*... school libraries would not survive without the support of public libraries.*

(Librarian, medium sized town, North of the country)

*I sometimes wonder if the School Libraries Network would be implemented if the support of the public libraries was not available. I don't think it would.*

(Librarian, medium sized town, North of the country)

School libraries were generally considered as being very poor and wanting the most basic support. Respondents to the present study gave abundant examples of the needs of the school libraries and also of the lack of awareness of their roles amongst the teachers.

*Schools are so unaware of what a library is that without our help they would never be able to do something in this field. With this I don't mean to diminish the roles of teachers or any field of their competencies. If we were not here to provide some training and support, making them understand why such furniture should be chosen, making them understand that a book before going to the shelf must go through a process of cataloguing and indexing... They were completely unaware of this.*

(Librarian, medium sized town, North of the country)

However, there is evidence emerging from the data that the level of awareness about school libraries amongst the teaching profession is growing. One of the results of this is that more demands for public library support are made.

*A number of the pedagogical projects of schools are the launching and organisation of the school library. And the support of the Municipal Council through library staff is very often required.*

(Councillor, medium sized town, central region of the country)

Specialised staff was mentioned by a number of respondents as virtually non-existent in school libraries. The present research has already highlighted the shortage of staff in public libraries, but the situation in school libraries was

considered much worse than in public libraries, and training in library and information studies for the existing staff is rare.

*And since the schools do not have as a rule staff with specific training in library work, this is a kind of support that is very valuable, indeed very necessary.*

(Councillor, medium size town, North of the country)

*It is very important for the full utilisation of resources, and because of the close relationship that always exists between libraries and schools. Especially in our country, considering that school libraries are very poor, and the training available for educational agents is scarce, public libraries play an important role.*

(Librarian, medium sized town, central region of the country)

*The picture of the school library in Portugal is not exactly very pleasant, and the support from the public library may be very important to help to develop or somehow help to train those people that eventually may develop those projects in the school library.*

(Librarian, medium size town, Central region of the country)

One councillor, who is a teacher by profession, gave a practical example of how this support was provided when she was still working at school. Her testimony was an account of the commitment of public libraries to the support to school libraries, a confirmation of the problems that teachers are facing when attempting to make some kind of intervention in the libraries of their schools, and a reinforcement of the above mentioned staff shortage.

*Sometimes in schools we don't know what to do, but we know that we have somebody to turn to. When my school made the bid to the School Libraries Network, I visited two public libraries and asked for support because I had not had any training to do the project. And that support was provided, frankly, with all the availability. "Always come back", I was told.*

(Councillor, medium sized town, North of the country)

A number of respondents associated the mobile library service with the support to schools and school libraries, and acknowledged its importance especially to those children living in small villages or otherwise far from the location of the central library. The data suggest that mobile libraries are making up for the non-existent school libraries.

*Through the mobile library which visits all the primary schools once every*

*four weeks, and in most cases, if it was not for that library there would not be any access to the book and to information.*

(Librarian, Medium sized town, Central region of the country)

*The municipal library runs a mobile library that visits each one of the schools in the municipality at least once every two months.*

(Councillor, Medium sized town, Central region of the country)

The data from this study suggests that the number of local authorities running a mobile library service was as yet relatively small. The issue came up frequently in the responses, suggesting that it is on the agenda, and is cause of concern for those involved, but often it is something that did not evolve from early stages of planning. Financial constraints were the main causes of the delay in starting the service.

*We have already thought about a mobile library. The decision for that has been taken last year (...) But this is an expensive project, and we have not yet been able to raise the funds...*

(Councillor, Medium sized town, Central region of the country)

Other cases emerged in which the mobile library service was running with apparent success but several problems were being found, again due to constraints and lack of appropriate resources, such as staff.

*We do have a mobile library, but it does not stop time enough in each one of the parishes, the runs are not done in the best possible way to serve the communities, precisely because we do not have staff enough to do that.*

(Councillor, Medium sized town, Central region of the country)

The data indicate that book boxes and bulk loans are other ways found by Portuguese libraries to reach schoolchildren in isolated vicinities.

*We have a set of six book boxes with 50 books each, which run the schools under requisition of the teachers. These boxes are either 2 or 4 weeks in each school, it depends on the school. This is a good support to the schools that do not have a library, especially primary schools and kindergarten.*

(Councillor, Medium sized town, Central region of the country)

*We have signed a protocol with the schools allowing teachers to borrow books from the municipal library, bulk loans. We do not have the boxes because our schools, sadly, are too small.*

(Librarian, small town, Central region of the country)

More than one respondent suggested that book boxes were also a good way of promoting the library, making its presence felt even in remote places, and leading eventually to actual visits to the library building.

*The book boxes have a very specific objective: to reach the rural parishes, where sadly kids had never had a contact with the book. It is also a way for them to have a first contact with the library service, and later they come and visit the library in groups organised by the school.*

(Librarian, medium sized town, North of the country)

Some references were made to the potential problems that public libraries may face because of the support to school libraries. The main concerns were about the added resources that the public libraries would need if they were to meet this challenge. The following response illustrates this concern.

*When I said that I have some doubts about the success of this, I mean that with the expansion of the network, and in our case we have five schools that were supported, possibly more eight will be supported this year. If it goes on I am not sure if we will be able to cope. We have to have more staff. That is the big issue.*

(Librarian, medium size town, Central region of the country)

The data from this research suggest that public libraries were not being given adequate resources to support school libraries. For instance, none of the libraries where the interviews took place had one librarian exclusively in charge of the support to school libraries. This is confirmed by the literature, as we shall see later in this chapter.

Public librarians and elected members in Portugal share a widespread belief that providing support to school libraries is one of the key roles of public libraries. Whilst this support is seen as crucial for the survival of the school libraries the respondents also consider that the public library service may as well benefit from it. The diverse ways of provision of this support also emerged from the data. These include:

- Support in the setting up of projects for the establishment or renewal of school libraries, including advice on architectural aspects and on the purchasing of furniture and equipment;

- Support in the more technical aspects of library work, such as providing information and support in the selection and acquisition of books and materials, in cataloguing and indexing;
- Support in the training of teachers and other school staff on basic aspects of library work, and on “animation” and promotion of books and reading.

The poorness of the school library service in Portugal is well documented in the literature. Since the 1980's, librarians, teachers and educationalists have been raising the issue in writings and intervening in diverse forums (Pessoa, 1985; Cabral, 1988; Magalhães & Alçada, 1993; Calixto, 1996; Veiga, 1997).

As early as 1977, a group of teachers participating in a seminar organised by the Ministry of Education (quoted in Cabral, 1998) described the situation of school libraries as follows:

- “Insufficiency or non-existence of facilities;
- “Inadequacy of existing facilities (size, environment and lighting);
- “Use of the library space for activities that have nothing to do with the library;
- “Deficient equipment (lack of adequate stacks and materials; lack of reprography facilities);
- “Non-preparation of staff (teachers in charge and auxiliary staff);
- “Insufficiency of time allocated to the teachers in charge;
- “Inadequacy of opening hours to the needs of the educational community;
- “Problems with lack of financing and technical support.”

This situation did not alter until a new Socialist Government came into office in 1995. In that year the Minister of Education and the Minister of Culture appointed a working party with the purpose of “analysing and proposing measures” to “stimulate the use of the book for learning, and the development of a school libraries network” (Veiga, 1997: 77). This working party produced a report (Veiga, 1997) which has had a profound impact and is leading to significant transformations (Rede de Bibliotecas Escolares, 2000). That report, whilst acknowledging the efforts of teachers and librarians to create libraries in schools, confirmed all the problems above mentioned.

Following proposals put forward by this report, important changes are taking place in Portuguese school libraries. A new department (the School Libraries Bureau) was created at the Ministry of Education with the purpose of developing the School



Libraries Network. Every year, this Bureau issues a call for proposals, and a number of schools receive special financing for construction work and refurbishment of facilities, equipment, documentation and ICT. In the context of this project, many teachers are being trained to be teacher librarians (Rede de Bibliotecas Escolares, 2000).

The relationship between school and public libraries has been a permanent feature in the discussions about school and public libraries in Portugal. The seminal report that launched the Portuguese Public Libraries Network (Moura, 1986: 47) considered that the development of a school libraries network would be a key issue for the future of public libraries and that a balanced evolution of both systems would be highly advantageous, but did not approach the relation between them.

Nunes (1996:93) considered that the articulation between these two kinds of libraries should be stimulated with a limited purpose of promoting the public library. However this author also warned that this should always be considered "as a complement and not as substitute" of the school libraries.

The 1996 report (Moura) argues that "public libraries can not and should not make up for the non-existent school libraries", and that any institutional support should be preceded by an increase in human and financial resources of school libraries to be provided by the Ministry of Education and/or the Local Authorities. It also considered that "the expectations of teachers and students towards public libraries are unadjusted and excessive". Overall the tone is not really favourable to the support of public libraries to school libraries. This reflects on the guidelines provided by the IPLB for the building of new libraries (PORTUGAL. IPLB, 2000), which did not consider the issue, did not provide any guidelines for it, and did not allocate any resources, be it space, materials or staff.

However, research conducted in 1997 (Figueiredo & Calixto, 1998) revealed that the support of public libraries to school libraries was already a reality. Three quarters of the libraries that responded to the inquiry informed that the support to school libraries is part of the support provided to schools. It could be argued that in this specific case, public libraries did not pay much attention to the guidelines, and actually provided a service that was much required.

Calixto (1994: 62) described how public libraries attract many children and young people that “invade it in large and more or less noisy groups, sometimes full classes”, and went on to consider how the poor provision of school libraries could have a negative impact on public libraries.

The consideration that the Municipalities, through the public libraries, would be a key partner in building the school library network was one of the features of the 1997 report on school libraries. The creation of a new service in public libraries was proposed: the School Library Support Services, with the acronym SABE, in Portuguese. The purpose of this service was stated (Veiga:1997, 64):

- “Take responsibility for the indispensable technical support to the execution of the programs of schools;
- “Produce information resources destined to schools in the domain of librarianship, through existing systems;
- “Organise seminars and training, aimed at teacher-librarians and other “members of the staff;
- “Promote interchange and rotation of resources between schools, and a lending service.”

The conception of this service is influenced by the philosophy of the British School Library Service (Calixto, 1996) and some of its aspects may be found in the recently approved IFLA Guidelines for Public Libraries. This document (IFLA, 2000), considering the relations of public libraries and schools, lists a set of forms of co-operation, that include: sharing resources and staff training, co-operative collection development and programming, class visits to the public library and joint reading and literacy promotion.

Alves & Neves (1998) suggested that Portuguese public libraries embraced this new challenge, and although having some difficulties of their own, made a positive evaluation of the first two years of the project. They found positive aspects of the co-operation that had been established. Among these are a good relation between public library staff and teachers and a growing awareness between elected members and school managers of the role of the school library.

However, some problems were also detected:

- “The lack of training of people in charge of school libraries. The growing needs of support from the municipal library to school libraries (mainly in primary schools) and the implications this may have in the functioning of the

municipal library.” (page 86)

These implications, according to the authors, were not being appropriately considered, and the fears of added pressures on the public libraries were apparent:

“During the first year of the project of the School Libraries Network there was not an increase in human and material resources in the municipal libraries. Except for one case, the SABE was not formally established due to lack of political decision, staff and space.” (page 85)

The support of British public libraries to schools via bulk loans of books can be traced as far back as the 1920's when a report indicated that 113 public libraries were lending books to schools (Heeks, 1996). This author presents an historic perspective of the School Library Service (SLS), which having had its high and low points, much associated with economic, social and political changes in the country, is presently considered as an established role of most local authorities.

The fact that an average 85% of pupils in the UK are served by school library services is eloquent evidence of their influence (Creaser, 1999). However, Herring (1988: 66) points out that there is “a great disparity in the provision of school library services”. This disparity reflects on the levels of stocking and on the number and qualifications of staff involved.

The influential report “School Libraries: The Foundation of the Curriculum” (Great Britain, Office for Arts and Libraries, 1984) stated that

“The great majority of local education authorities recognise that school libraries can be developed more economically and effectively if they are supported by an authority-wide school library service which provides professional advice and expertise, supplementary materials and central services.” (page 19)

This quotation mentions three key issues about the SLS: It acknowledges the importance that local authorities attribute to it for the development of school libraries, it justifies this importance in economic grounds, and it specifies the general aims of the service.

A list of the functions of the school library service in the UK would include: “to act as a back up to the under-resourced school library” (Herring, 1988: 66), to provide bulk loans and software lending to schools, to organise displays of materials to help school librarians in the selection process, to act as a link for interlibrary loan of

materials, to provide bibliographic services and advice to schools and support the selection of staff for the school library.

The Library Association Guidelines for Secondary School Libraries (Tilke, 1998) present an updated vision of the SLS discussing issues that are at the forefront of the library and educational debate, such as ICT, including the use of the Internet, and lifelong learning.

As stated above, there is an economical rationale for the establishment of school library services: it is considered by local authorities as the more “economically and effective way” of supporting school libraries. Another reason may be found in the literature and echoes some of the worries of the Portuguese respondents to this study: poor school libraries may put a great pressure on public libraries and may deviate them from their objectives. One example of this may be found in a research of the University of Central England (Elkin, 1996a: 204):

“... public libraries for years have freely supported inadequate school libraries and often substituted for non-existent or inadequate schools library services, with little or no support from the education authority and, sadly, with little public recognition”.

The literature suggests that the school library service is a well-established service in British local authorities, and that, in many cases, it is run by the library and information services (Heeks, 1996). The status and resources of these services are not the same throughout the country, and political, administrative and educational changes occurred in the last two decades caused serious concerns amongst professionals about the future of the services. However, there is a general understanding amongst the stakeholders about their value.

Both the literature and the data collected for this study suggest that the public librarians and elected members in Portugal have a twofold perception of the relation between public and school libraries. Many believe that the poor state of school libraries puts a strong pressure on the Public Library Service and may hamper its development. On the other hand it is also believed that the support to school libraries may also put added pressures on the public library, considering the need for more resources. However it is assumed that by supporting school libraries, public

libraries are creating conditions for a clarification of their own roles and for the provision of an improved public library service.

It should be noted that the interviews to this study were carried out during the first year of the actual development of the School Libraries Network. Some of the interviewees were in municipalities that were involved in the programme from the outset whilst others were not. The data so obtained is likely to be influenced by this factor, as the levels of involvement and experience in this issue were different.

## **7.4. Study rooms and homework support**

Public libraries have traditionally been used by schoolchildren and young people as a place for study and do homework in Portugal, in the United Kingdom and in many other parts of the world. However the 1990's witnessed some important developments in this situation, with public libraries, especially in the United Kingdom, engaged in the definition of services to meet the needs of these users in a more structured and sustained way.

This comes in response to an increasing demand of children and young people as a result of alterations in the delivery of the curriculum that have underlined the importance of children's autonomy and independent learning. Increasingly, teachers are giving more importance to project work and assignments as more effective ways of learning and accessing than long talks and tests.

The data from the present research indicates that in Portugal diverse, indeed conflicting, opinions about support to homework by the public library may be found amongst librarians and elected members. Many recognise that there is a strong demand from students and agree that the library should work to meet these demands. At the other end of the scale, other respondents, while acknowledging the demand, consider that this is not a role for the public library, and the school should provide for it.

Support for the idea of public libraries supporting homework and study was found in many interviews. In some cases the agreement with the idea was matched by the actual provision of services, as exemplified by the following responses.



*Today youngsters continue to look for the public library as a support to school, for homework. We have in the library a room specifically for homework, sometimes group work. And I have one member of the staff that supports children. Usually we split them as follows: kids come in at around 4.30 PM, we have storytelling time or a workshop. Then around five... those who want ... it is very informal but we try to provide that guidance and then they do their homework here in the library. They search for information, they clarify doubts they may have, they have support, because I consider it as an important function of the library...*

(Librarian, small town, Central region of the country)

*I don't agree with a separate space, but I think that a support service to this kind of use of the library is important. As a matter of fact it exists. We do this service.*

(Librarian, medium size town, Central region of the country)

Some responses, while recognising the need of schoolchildren having library support for their study, considered that the library couldn't provide for that support.

*It would be too heavy an obligation, and it might cause some dispersion from our work, and perhaps even from our purposes.*

(Librarian, medium size town, Central region of the country)

A growing number of articles and papers published about this theme in the United Kingdom is an indicator of the interest it has been attracting. However these studies have not yet been replicated in Portugal, where the literature is very scarce.

Bevin & Goulding (1999:49) wrote that "... homework help in public libraries is not new (...), but homework help clubs have recently become 'flavour of the month'". They go on to quote an unpublished report of the London Borough of Southwark that suggests that homework clubs have been "...seized on in the library press, by service heads and local politicians, not to mention many national politicians, as an excellent way of helping young people help themselves". The response of public libraries in the United Kingdom has been a steady development of services diversely named as, amongst others, homework clubs, homework centres, and study centre/clubs.

The report *Investing in children* (Great Britain, Department of National Heritage, 1995), listing the components of a core service for children identifies "homework space" as one of those components but does not develop the concept nor gives any guidelines for the implementation of the service. *Reading the future* (Great Britain,

Department of National Heritage, 1997), also approaches the issue and indeed gives more details about the vision of the service:

"Many children also need a quiet place outside school or home to study. Libraries are increasingly providing discrete homework centres. These often have their own collections of books and reference material and sometimes there is a teacher or volunteer to help. The Prince's Trust has funded the establishment of homework centres, including some public libraries. Libraries, working with suitable partners, should continue to extend the provision of homework centres, so long as they do not disrupt other users." (page 20)

Several master dissertations have been produced in the Universities of Sheffield (Newport, 1998) and Loughborough (Bevin, 1998), and in 1999 the Library Association and the National Youth Agency published a *Code of Practice* for public library support for homework. The School of Information Studies of the University of Central England conducted a study and recently published a report on homework clubs. (Train, B., et al., 2000).

Early writings suggest that the work public libraries were doing in support of homework was not duly recognised. Greenhalgh & Worpole (1995: 109-110) describing the support of The Princes's Trust to the set up of new centres wrote that most of these were being established in schools or community centres rather than in public libraries. However the situation where "much of the debate has ignored the vital contribution they [the public libraries] can make" (Tilke, 1997) appears to have rapidly evolved to one where this role becomes increasingly acknowledged.

A general benefit obtained via homework clubs is the raising of educational standards. Train et. al. (2000) suggest a wide set of advantages for the users, staff, parents and teachers obtained through a sound establishment of homework clubs. A report of the West Sussex County Council, quoted by Bevin & Goulding (1999: 56) identified the benefits obtained by the users of its homework club. These benefits included an improvement of student's self-confidence and attitudes to independent learning, in teacher-student relationships and in information skills.

Homework clubs have also been seen as having an important social role. This emerges from the data obtained for this study and is widely discussed in the literature (Bevin & Goulding, 1999). This issue shall be discussed in the next chapter of this study, which deals with the social roles of public libraries.

#### 7.4.1. Requirements

A wide set of reasons why children need a place to study and do homework was identified in the responses to the present study. They vary from the long distances between home and school, mainly in rural areas, that keep children away from home for a great part of the day, to the lack of facilities in the community, especially school libraries.

School children may spend much time in town, away from home, and there are not many places they could use to study or simply to stay.

*Many of our youngsters leave home as early as 6 AM and do not return before 7 PM, because they come from far away... If there is a place in the library for them to study it will sort out many problems. How is a child to start doing homework at 7 in the evening?*

(Councillor, medium size town, Central region of the country)

Children's homes may not have proper conditions for them to study, e. g. they may not have a room or a silent place to study.

*It is very important, mainly in our region, because at home they do not have a proper place to work, to be quiet, working.*

(Councillor, small town, Central region of the country)

Even when children do have a quiet place to study at home, library would seem a better place, because it has resources that do not exist at home, e. g. reference works or ICT.

*Public libraries are the best place for those study and homework rooms, because it is where they may find the resources necessary for their homework, and perhaps a propitious environment to study.*

(Librarian, medium size town, South of the country)

In urban areas, with both parents working, they may not have the necessary support at home, and may be left alone and be distracted with other activities, e. g. watching television.

*We know that especially in urban areas like ours, kids go home and they have nobody to make them company and it is very easy to switch on the television...*

(Councillor, medium size town, Central region of the country)

Trends in education lead to an increase in individual and group project work, with strong components of research.

*Nowadays children do much project work for school, about many themes, about commemorative dates.*

(Librarian, medium size town, North of the country)

Since project work is often done in groups, children need a place to meet. This may become a problem since they may come from different vicinities. Facilities to meet children's needs, as far as homework and project work are concerned, do not exist in the community. The poor situation of school libraries was often mentioned.

*In theory, public libraries should not have to provide for those spaces, because they should exist in the school library. The reality we have is very different, because public libraries do have many schoolchildren. I think we need those spaces because of the want of school libraries, because if these libraries met the needs of their children, the demand of those places in the public library would not be so strong.*

(Librarian, medium size town, North of the country)

These data suggest that amongst Portuguese public librarians and elected members there is a widespread perception that schoolchildren and youngsters do need space and support for their homework.

According to the respondents, schoolchildren and youngsters require support for their homework and study, due to a set of circumstances:

- Demographic and educational structure oblige students to go to school far from home;
- Weaknesses in school facilities, namely a poor school library service;
- Changing patterns of family originate a lower level of parental supervision;
- Social and economical circumstances may impair conditions to study at home;
- There is a distinctive lack of facilities in the community that could provide this kind of support.

#### 7.4.2. Resources

The data from the present study indicate that in order to support adequately study and homework, the public library needs a set of specific resources, namely space, staff and materials. These issues shall be generally dealt with in chapter 9, on managerial issues. For the moment the issues relating more specifically to homework support will be briefly discussed.

The lack of space was again mentioned as a barrier to the development of this service.

*Kids are coming much to the library and do group work. And presently we have not the space for that.*

(Librarian, small town, Central region of the country)

However, imaginative solutions were found.

*Although this library is relatively small, we tried to dispose the stacks in order to have spaces between them where we have tables. We tried to create spaces with some privacy.*

(Librarian, small town, Central region of the country)

*I would say it is important but not as a study room with a physically autonomous space, but as quieter areas, that I think would work well close to the reference service. Moreover, the reference service is much used as support to study. I don't agree with a separate space...*

(Librarian, medium size town, Central region of the country)

Generally the support for homework and study in Portuguese public libraries is carried out in the general reading rooms. Whilst this may pose some problems, it follows the concept of "repackaging and redevelopment of existing services" (Blanshard, 1998: 176) and may signify a more intensive and perhaps a better use, of existing resources.

Research carried out in the UK found that space is also an important issue in homework clubs, and is often considered to be insufficient. Train et al. (2000: 58) concluded that this space varies considerably in the authorities they studied but found examples where the users complained that the working area was not enough. Some library authorities, responding to Bevin & Goulding study (1999), also identified inadequate space as a challenge they faced. This study also indicates



cases where refurbishment and/or rearrangement of the space had taken place to sort out immediate problems.

A clear definition of aims and objectives of homework clubs emerges as essential. Being in their infancy it is no surprise that different library authorities have different approaches. Nevertheless, it is possible to identify three broader aims for these services associated with lifelong learning, the provision of relevant resources, and the assistance to study by the provision of staff. (Bevin & Goulding, 1999)

Staff to support study and homework emerges as a crucial issue. Leaving apart the problems of quantity, the profiles of the helpers that emerge from the interviews have a blend of library and education skills. Some doubts about the most appropriate profile were expressed but the education skills were very much stressed and in some cases the respondents said that teachers should support this work.

*I do have a member of the staff giving support to the children's homework.*

(Librarian, medium size town, Central region of the country)

*Children could not be on their own. Somebody would have to support them. I am not so sure whether it should be a librarian or a teacher.*

(Librarian, medium size town, Central region of the country)

*The most important would be if they were accompanied and guided by teachers. They should have guidance from the library and guidance from a teacher.*

(Librarian, medium size town, Central region of the country)

Staff ranks high in the ongoing debate about homework support in the United Kingdom, as the tasks included in the service provision are sometimes considered beyond the traditional skills of professional librarians. The London Borough of Southwark was one of the first to establish, in 1995, a network of seven "Homework Help Clubs" staffed with "Homework Helpers". Their basic skill was a "demonstrable interest in and experience of young people and their needs" and their background was after school clubs, youth services, speech therapy, and so on (Murray, 1997, 12). However, Train et. al. (2000) concluded that half of the authorities surveyed in the study employed public library staff.

Train et al. (2000) concluded that in the UK no particular academic qualification was required and that personal qualities and a willingness to work with young people's

learning were most valued. This study recommends that specific job descriptions should be developed and staff training should be made available. Bevin & Goulding: 1999: 53) found that most library authorities in the UK used the public library staff to work to support homework and suggest that "ideally, the staffing should consist of youth workers, teachers and librarians...". They recommend that in any case this service should have fully dedicated staff during its functioning hours.

The interview schedule used in this research did not specifically ask about the materials that should be made available to support homework. However, it may be safely suggested that the respondents did not conceive a specific homework collection, and think of this service as using the general library collection, and more specifically reference materials.

*The children come and have their quite corner to make their assignments either with books or other library documents, or books they bring themselves.*

(Librarian, small town, Central region of the country)

*The library, specially the reference service is used mainly to support study.*

(Librarian, medium sized town, Central region of the country)

The literature identifies the following materials in homework clubs: reference books, CD-ROM's, consumables, computers office applications, printing facilities and Internet access (Train et al., 2000). Bevin & Goulding (1999) generally include these materials and add what they refer to as "basic tools" for study, e. g. calculators and geometry sets.

The present research suggests that appropriate resources are essential if public libraries are to play an effective role in supporting children's study and homework. The perceptions of Portuguese librarians and elected members about the resources necessary to support homework are that this function is carried out using the general resources of the library, be it space, staff or materials. The reasons for these perceptions shall be discussed later in this chapter.

The definition of co-operation and partnerships by the public library appears to be a crucial issue if this service is to be delivered in an efficient and cost effective way. (Bevin & Goulding, 1999) Obvious partners for this co-operation are the schools themselves, but others were also identified such as the education authorities, school

library services and local youth agencies. Partnerships with external bodies such as enterprise councils and commercial companies are equally important.

Other points emphasised in the literature are:

- The need of a marketing approach, with a detailed knowledge of user needs,
- A consistent and continuous promotion of the service
- The importance of accessing the service, not only recording the numbers of attendance but also, and mainly, identifying the benefits children obtain from homework support

### 7.4.3. Constraints

A number of respondents stated that public libraries should not provide support for homework. This is exemplified in the following statements:

*I say those are services that should be provided by the school, by the educational bodies and not by the library. The library is a complement also in this aspect. I might consider it important if there is no other space, but primarily that space should exist in the school itself.*

(Councillor, medium size town, North of the country)

*That would depreciate the concept of the public library. We are a library primarily prepared for lending. I reckon this is a reason for many complaints. We have a suggestion box, and that is the most frequent suggestion, that we should have a specific room for group work - we do not allow group work here - but I don't think it is important to create that space because that's up to the schools and school structures.*

(Librarian, medium size town, North of the country)

Whilst recognising that there is a demand for study support, these and other opinions were expressed against its provision. The reasons given for this may be summarised as follows:

- The library does not have enough space;
- Students may study in the library, there is no need for a special room;
- It would require specialised staff;
- There are so many pupils that any service of this kind would submerge the library;

- It is bad for the work of the library as pupils occupy all the space and bring their own books;
- It is a responsibility of the school.

Students have been using public libraries in Portugal as a place to study, even before the developments brought about by the Public Libraries Network. The Manifesto published in 1983, " (A leitura pública em Portugal: Manifesto), suggests precisely that this was one of the few roles the libraries were actually playing.

"Libraries, almost always located in ancient, cramped and comfortless buildings, are either considered solemn places where only few erudite are allowed or merely reading rooms used by secondary school pupils."

It may be inferred from this quotation that the general environment of libraries was not very bright and the use of the library by students did not add much to its profile. Echoing this idea, Nunes (1996:57) wrote that before 1986:

"The majority of our libraries are used almost exclusively by students, and their collections reflect that situation and at the same time contribute to its reinforcement, as they don't meet the demands from other kinds of users."

The public libraries that opened in Portugal after 1986 have attracted many children and young people and actually there is evidence to suggest they are used mainly by these age groups (Moura, 1996). However, their presence in the public library has raised discussions amongst professionals, and voices have been heard complaining of problems, even disruption caused by a great influx of children and youngsters, greater than what many libraries are able to cope with. In a previous writing, the present author (Calixto, 1994: 62-63) wrote:

"They want to use it to study and do their individual or group assignments, bringing their own study materials. Due to a lack of skills they find it difficult to find relevant information.

"This situation puts the public library at a real risk, if we consider its specific aims, essentially related to the community. Conflicts are not rare, for instance due to the noise these groups make in the library, or simply due to the lack of seats originated by their presence."

This perception that a massive presence of schoolchildren may pose an unbearable pressure on public libraries was echoed in many responses to the present study and as a matter of fact even in some UK literature.

*We have the rooms full of kids, most of the time doing their assignments, and when it comes to project work it is really chaotic. When someone comes and wants to utilise the library there is not a table available. We do not have many seating places and very often they are not using library materials but their own books.*

(Librarian, small town, Central region of the country)

The report *Borrowed time?* (Comedia, 1993: 26) presented identical conclusions about a library system that is in many ways much better equipped than is the case in Portugal.

*"Nearly all of the libraries we looked at in the cases studies reported large increases in the number of school students who were coming in to the library on a regular basis to do project work, use the reference section, ask librarians the answers to all their homework questions, occupy the seats and tables, and generally make their presence felt in mostly pleasant (but occasionally disruptive) ways."*

A major constraint to the development of homework clubs in Portuguese public libraries was identified by a number of responses. It relates to the conception underlying the whole of the Public Libraries Network in Portugal.

*I think it is important. But those people that have high responsibilities in IPLB should put this into their heads. This library attracts lots of kids. And this is good. Most of the users of this library are students, and they come because this is a nice, comfortable and attractive venue. But it should be noted that the libraries of the Public Libraries Network, due to the ministerial policy, are very short of seating places. We also know that the aim is to favour home lending and hence there are not many places to seat. Our own policy was to favour that kids work in groups. But is IPLB that needs convincing that this is also important, and in the building policies this should be defined, and it is not.*

(Councillor, medium size town, North of the country)

Indeed, none of the reports published by the Ministry of Culture of Portugal (Moura, 1986, and Moura, 1996) deals with this issue. The guidelines issued yearly by IPLB (PORTUGAL. IPLB, 1999, and PORTUGAL. IPLB, 2000) also ignore it. It may then be concluded that some of the constraints impeding on the support to homework in public libraries in Portugal result from a view held at the highest strategic level.



#### 7.4.4. Advantages for the public library service

Some respondents to the present study considered that the provision of facilities and support for study and homework might have beneficial effects upon the library service. Especially it was mentioned that it would contribute to enlarge the number of library users, and would make a very positive contribution for the lifelong use of the library service.

*Spaces for homework will bring the students to that space and originate the habit to attend the library.*

(Councillor, medium size town, Central region of the country)

*Because I believe that they come to study, but adding to that, they will always go for some supporting bibliography.*

(Librarian, medium size town, Central region of the country)

The investigation into the value and impact of library-based homework clubs, carried out in the United Kingdom (Train et al., 2000), concluded that that supporting homework has benefits to the public library service. A key finding of this research was: "Homework clubs have clearly provided the public library service with a valuable political opportunity to raise the profile of libraries within political government." (p. 80)

In Portugal there was not a specific reference amongst the respondents to the research indicating the importance of homework support in raising the profile of the library either in social or political terms. However, as discussed at length in chapter 9, the improvement of educational services as a whole was seen as very important to raising the social and political profiles of the public library. The following statement illustrates this idea.

*The development of these services is going to contribute to raise the profile of the library. What we do relating to education contributes to create a conception of what a public library really is, and everything we do contributes to strengthen that idea of the library.*

(Librarian, medium size town, South of the Country)

The present research suggests a diversity of opinions amongst Portuguese librarians and elected members on the roles of public libraries in supporting homework. While the need for this support is generally recognised, the shortage of

resources to meet them is very apparent, and indeed specific resources are not allocated for this purpose, indicating an obvious lesser consideration of the issue. This is in sharp contrast with the trends identified in the mainly British literature that, while acknowledging diverse provision of the service across the country, gives testimony of a raising demand, support and delivery of this service.

## 7.5. Supporting teachers

The relation between the public library and teachers emerges from the data as being an important role of public libraries. That relation has several facets and also appears to raise some problems.

Teachers were considered as key partners and facilitators of the aim of the library to reach children. The respondents to the present study also considered that public libraries also played an important role in the training of teachers. The following statement illustrates these facets:

*We must keep a very close relation with schools, in order to draw the attention of teachers, because via the training that we do for teachers, we are going to reach people that will bring other people (the children) and these will eventually become library users.*

(Councillor, small town, South of the country)

The idea that, in order to reach children, libraries must work with teachers and other professional matches the conclusions of an investigation carried out in the UK (Denham, 2000: 41).

*"Other adults identified as key clients included teachers and other professional. Pre-school carers were seen as particularly significant in all types of authorities, reflected in the considerable work carried out by library authorities with under-fives groups. (...)*

*"These findings suggest that, although children are the library's key clients, it is often necessary to access them through an adult, and that working with a wide range of adults and professional carers will enhance the quality of the service available to the individual child."*

Teacher training has focused on diverse aspects associated with books and reading as well as library skills. The following responses illustrate these kinds of activities:

*We have here teacher training quite often. It was only last month that we had*

*training of teachers on literature for children. And that is very frequent. The Multipurpose Room is much used for teacher's training. And some of these sessions are organised by the library itself.*

(Librarian medium sized town, Central region of the country)

*User education is fundamental. We provide training for schools, and groups of schoolchildren come and visit the library accompanied by teachers to whom guidance is given on how to make a better use of the library.*

(Librarian medium sized town, Central region of the country)

*It is not by accident that on June 1<sup>st</sup> we are having a workshop on dramatic expression, specifically directed to teachers.*

(Councillor, small town, South of the country)

Although some of these workshops and seminars may be open and informal, a number of responses suggested a high level of co-operation with the training bodies that in Portugal provide formal and accredited training for the teaching profession. This is important as it means that these actions are not only added value to the teachers' CV; they are also officially recognised and count for the progression in their careers.

*The library organises training targeted to teachers. We have worked mainly with Primary Schools and the training that we have provided was mainly on "animation" techniques and reading promotion. We have worked in close co-operation with the local Teacher Training Centre.*

(Librarian, medium size town, North of the country)

Teachers make use of the library services as any other customer; they use materials and facilities. A higher level of support for teachers was identified in one response that gives testimony of a resource centre for teachers within the public library service.

*We have a resource centre within the library, with technological equipment, with games, with pedagogical packs for storytelling, with books, with a small collection of several materials. This builds a very strong relationship with teachers.*

(Librarian, medium size town, South of the country)

Another way of the public library supporting teachers' activities is the provision of exhibitions and book boxes to schools.

*Now many teachers come and ask us to have an exhibition at the school,*

*ask if we have book boxes available; book boxes have been very important.*

(Librarian, medium size town, North of the country)

The relationship of the public library with teachers is not one way only. Some responses suggest that teachers also help the public library, in some cases offering volunteer work.

*Teachers from those schools do help us, they come to the library, they help in decorating the space, and they come for free, because they want to, because they enjoy it, because we ask for their support and they come.*

(Librarian medium sized town, Central region of the country)

The overall perception of the collaboration of public libraries and schools as a rule is quite positive with both parts engaged and working together for common goals. This is illustrated by the following response.

*The co-operation with schools works very well. We have a yearly programme targeting schools, that we propose to schools, and that has worked well for some academic years, because every proposal we make to schools is accepted and they are highly participated. Up to the present moment there was not a single school that did not adhere. And, on the other hand, another movement has already started: some schools require our participation in activities initiated by the school, what has also been quite good.*

(Librarian, medium size town, Central region of the country)

However, some cases were identified in which the perceptions of the respondents indicated a lack of response and interest from teachers in making a proper use of the library or in establishing a partnership with it.

*I think that this is a delicate professional issue. Teachers are afraid that we enter in their professional sphere and we are also afraid that they enter in our areas.*

(Librarian, medium size town, North of the country)

*Sometimes teachers do not have the willingness to encourage kids to make more use of the library as they did not use it themselves during their education and then they feel children do not need them either.*

(Librarian, small town, South of the country)

*We have the experience of having schoolchildren visiting the library. And the following happens: Teachers come and just drop the kids here and go to the coffee shop. A great number of teachers do this.*

(Librarian, medium size town, North of the country)

The findings of this research suggest that amongst public librarians and elected members in Portugal there is a perception that teachers are essential to support the educational roles of public libraries. A two-way collaboration appears to be in place. Public libraries provide teachers with relevant books and materials, as well as with training and other kinds of support. Conversely, teachers help libraries by establishing a crucial link with the schools and with the students. Whilst this collaboration generally seems to work well, cases were found where the respondents were critical about the collaboration that they get from teachers.

## 7.6. Supporting higher education students

In chapter four of this study it was suggested that librarians and elected members in Portugal perceive a demand made upon public libraries to support higher education students. The reasons for this demand generally suggest poor provision of libraries in the higher education field.

*Schools in higher education do not have a proper library. They have one, but according to the students it is very poor.*

(Librarian, medium size town, Central region of the country)

*What I think is that the University should have a good library. They have sufficient income for that. But private universities live for profit and a library is not good for profit.*

(Librarian, medium size town, South of the country)

However other issues were raised by respondents, suggesting that even in those cases in which university libraries do exist, some students to prefer the public library. Amongst the reasons for this are an easier access to resources and more favourable conditions for borrowing. This idea is exemplified in the following response:

*I know that the University library has excellent bibliographic resources, but I also know that students do not have an easy access to them, they have not free access to the stacks, borrowing is more difficult, while here, in the public library the loan period is longer.*

(Librarian, medium size town, North of the country)



Opening hours of the public library are a significant issue when considering the library requirements of students. The data suggest that this is especially important in the towns that do not have a University and where students go for weekends or holidays. Librarians from three different rural municipalities acknowledged the need for extended opening hours brought about by university students. One of them also mentioned the issue of a friendly environment.

*Nowadays we have many students in higher education. Those youths come back for holidays, sometimes they have assignments to do, and they need to consult...*

(Librarian, small town, Central region of the country)

*I feel that some students from the University come here in July, more when they have holidays. In the Faculty, the library is not so easily accessible, if I may say so. We are less formal and it is easier for them to obtain what they want. Staff here, according to users, is friendlier.*

(Librarian, small town, Central region of the country)

*University students are not here during the week, but they come for weekends, and before the library was closed. Now we open on Saturdays and the vast majority coming is students, a great part is university students.*

(Librarian, small town, Central region of the country)

However, amongst elected members, the demands from higher education students are not so apparent. One, in a town, with a number of higher education schools responded:

*I think that in the case of our town the demand is minimum, since the areas of study are very specific, very technical, and I don't think the library should acquire books for that kind of student.*

(Councillor, medium size town, Central region of the country)

Another elected member, in a rural municipality said:

*I think that the universities have their own libraries, and those are specific to their own students and teachers.*

(Councillor, small town, Central region of the country)

A fundamental issue raised by some respondents was whether public libraries should provide, or attempt to provide, for the needs of higher education students, considering that, in principle, they should be satisfied in academic libraries.

*I believe that the public library is not a University library (...) That is complicated, it is to misrepresent the role of the public libraries in several ways, through spaces with working conditions, that the library normally does not have for the university students, through an exaggerated investment in documents...*

(Librarian, medium size town, Central region of the country)

*University students have other means, they have their specific libraries, the scientific libraries, associated to their fields of study...*

(Councillor, small town, Central region of the country)

*They don't pay the fees to us and I think it is a scandal. I repeat, it is a scandal that courses are allowed to open without specialised libraries in those fields of study.*

(Librarian, medium size town, Central region of the country)

However, a number of respondents, although feeling that the responsibilities of catering for students' needs lie primarily in their universities, would not as a rule turn these students away due to a policy of equality of opportunity. The idea behind this policy is that since the public library provides for the local community, and since students are members of that community, then they should be as entitled to the service as anyone else. This belief was exemplified by the following response:

*It depends on the kind of town we are talking about. In many towns the public library is the only space where a more direct support to universities students is available. Since these students are one kind of users amongst others, I think it is important that there is some support to this group of users.*

(Librarian, medium size town, Central region of the country)

While librarians, and, to a lesser degree, elected members in Portugal tend to consider the needs of higher education students and try to meet them, there is a consensus that the collections of public libraries seldom respond to the specific and sometimes very specialised demands from students.

However there is one domain where public librarians perceive that they are well prepared to meet some specific needs: the Local Studies collection. One librarian in a medium size rural municipality identified "data about the municipality for their assignments" as an important contribution public libraries give to university students. Another one was more specific:

*It is mainly the Local Studies collection, supporting a certain kind of projects*

*that only these collections are able to meet, for instance in areas as History, Archaeology or even Botany.*

(Librarian, Medium size town, North of the country)

A number of respondents also indicated the existence of special collections of materials associated with local writers, sometimes of a national dimension. These collections may or may not be integrated in the local studies collection, but in any case they attract not only university students but also a number of researchers interested in studying a specific writer.

The relation of public libraries to university students has not attracted much attention amongst Portuguese writers and researchers apart from a paragraph in Moura's 1996 report, which acknowledges the mutual advantages of the co-operation between public and academic libraries. The report goes on to conclude (Moura, 1996:12): "the individual's needs, in their quality of university students, should be satisfied by the University libraries". This may imply that this would not always be the case but no more details are given about the use of public libraries by these students.

Elsewhere the issue has attracted some attention. A study carried out in the Department of Education of the University of Sheffield on the roles of libraries in distance learning echoes some of these issues. It identified an "important and largely hidden role played by public libraries in the lives of postgraduate DL students who make considerable use of public library services" (Unwin *et al* 1998: 207). The issue was also studied in Sweden (Ericson, 1996) with a major survey to 18 public libraries suggesting a widespread use of public libraries by students from universities and colleges. Nankivell (1998) also addressed this matter, although included in a broader perspective of a cross-use of different kinds of libraries for diverse purposes.

According to Unwin *et al* 1998 (1998), public librarians in Britain see their libraries more as gateways to other collections and resources as they think that theirs are not suitable for students' needs. They also believe that public libraries may sometimes be more attractive to students than academic libraries as they are more open and their systems are easier to use. Furthermore, public libraries are seen as a good place to study.

"Several libraries noted that they played an important role for DL students by acting as a convenient place in which students could study. For some students, the library provided peace and quiet with friendly staff who were on hand to offer support when necessary." (Unwin *et al*, 1998:128).

This idea is echoed by Ericson (1996) who concluded that half of the university and college students came to the library to sit and work. Furthermore, his study finds many coincident points with the perceptions found in the data of the present research:

- Students find the public library easier to use, its staff friendlier, and the borrowing conditions more convenient than at their University or college's library;
- They find a good environment for work with a large number of reader seats (this is not the case in Portugal);
- The public libraries do not have sufficient resources to be able to provide a really good service;
- Students originate an added pressure on the public library resources;
- Some issues need to be addressed, such as funding and the need for a national library policy in the area of education.

The study by Unwin *et al* (1998) focused on the role of libraries in Distance Learning, but other research suggests that this is also the case for the whole of public library service. Nicholson (1999) investigated the impact of a new university on a public library service in Lincoln and found that a majority of students used the public library for academic purposes. One study carried out in Italy (Solimini, 1995) came to similar conclusions.

Librarians and elected members in Portugal appear to have divergent perceptions about the roles of the public library in supporting higher education students, with librarians more aware of the issue. Some factors appear to affect this perception. In towns where there are ancient and well established universities, the academic libraries better meet student's needs, and hence the pressure on public libraries is not so strongly perceived. On the other hand, libraries in recent Universities, especially those privately owned, are not as able to cope with student's demands, and the pressure on the local public library is heavily felt. It may be argued that this

is not an issue specific to any particular country and may be considered as a symptom of a trend, already identified, to the blurring of barriers between different kinds of libraries (Nankivell, 1998).

## 7.7. Discussion

This chapter addressed the perceptions of Portuguese public librarians and elected members on the roles of public libraries in supporting formal education. Public libraries are believed to play a key role in supporting the curriculum and the promotion of reading skills and habits, and in providing space and support for children's to study and do homework. School libraries are considered to be key partners of public libraries, and although some mutual benefits are considered, a general belief is that they are in a poor state and require high levels of support. Teachers and higher education students, in addition to schoolchildren, emerge from the data as educational beneficiaries from the public libraries service.

Some differentiation emerges from the respondent's opinions as to the diverse aspects of this support: the requirements made by the users, the actual capacities of the libraries to deliver, the implications to the library service in playing a diversity of roles and the resources needed for that purpose.

The views of the respondents to this study may be summarised as follows:

- Agreement on the idea of a close relation between public libraries and schools;
- Diverse perspectives on the nature of this relationship, emphasising some of its aspects and neglecting others;
- Widespread belief that both partners benefit from this relationship: schools benefit from having access to a wider wealth of resources whilst public libraries are able to reach a wider audience and are likely to have an improved utilisation;
- A general concordance with the idea of supporting school libraries due to a twofold set of reasons: as a way to alleviate the pressure of a heavy use of the public library by children, and as a way of indirectly providing for schoolchildren's needs.



- Mixed opinions on the provision of support for children's homework and for higher education students: the needs are widely acknowledged and trying to meet them is not totally excluded, but the responsibility for this is often considered as lying primarily with other institutions, i.e. schools and universities.
- The opinions about the relations with teachers are also ambivalent: whilst agreeing that they are instrumental in reaching children, opinions diverge on the actual response of teachers in making the connection of children with the public library.

The model of public library emerging from the present research is in many aspects associated with formal education and with the educational institutions. What follows is a discussion of the origin of these conceptions.

#### 7.7.1. Professional experiences

The fact that many of the respondents had had, were still having close connections with the education profession makes it easy to understand their belief in the connections between libraries and schools. Most of the councillors had been teachers before being full time elected members, others were acting as part time elected members and went on working as teachers. Furthermore in many municipalities cultural and educational affairs are the responsibility of the same councillor. A number of librarians had also been a teacher before joining the library profession. The following responses illustrate this situation:

*I had my experience as a teacher for many years. I socialised with the children and had my pedagogical education.*

(Councillor, small town, Central region of the country)

*This concern with education and with the educational roles of libraries has much to do with an experience I had, working at the GETAP, the organism of the Ministry of Education that launched the professional schools. I worked with many interesting people, with very exciting ideas about this area, and as a librarian I begun to understand how the library could participate in those innovations that were emerging.*

(Librarian, medium size town, North of the country)

### 7.7.2. The environment

The social and educational environment in which public libraries operate may also facilitate this connection. Throughout this study, abundant evidence was presented to suggest that in Portugal:

- mainly schoolchildren and to an extent university students are the principal users of public libraries;
- a number of families finds it hard to provide a place and support to study at home;
- school libraries either are very poorly equipped or simply do not exist;
- in some cases, especially in small towns with newly established private universities, university students require the services of the public library.

Working in this context, and realizing the demands put upon them, librarians and elected members, understandably are lead to believe and act in what they construct as the best interest of the majority of their users.

Furthermore, there is a kind of an educational lobby pushing for the library to provide services in this field. The following statement is an example of that.

*We have people lobbying in that way. It is very apparent that the cultural and educational lobby is very strong, they have means to make themselves heard much more than other groups. We are talking of people that have access to the local media. The farmer living in the hills that may not have water at home has not the same means of making himself heard as the teachers, the lawyers, or the artists have. These write in the local paper...*

*(Councillor, medium size town, North of the country)*

### 7.7.3. Lack of resources

Some constraints on the support of public libraries for formal education were also found. The shortage of resources, especially staff but also space and facilities, was already identified and discussed in the previous chapter and will be dealt with more detail in chapter nine. This is a pervasive issue, which influences all the educational roles of public libraries.

#### 7.7.4. Lack of theory

Another constraint, also indicated in the previous chapter, is the lack of a theory on the roles of libraries and education. This is true as far as lifelong learning is concerned, but it may also be applied to the support of public libraries for formal education.

In this context the documents produced by the Ministry of Culture gain a special relevance, and, in spite of being very general, provide some orientation for the layout of the library and suggest the services to be provided. As it happens, both the reports published by the Ministry of Culture (Moura, 1996) and the guidelines for public libraries issued by IPLB (PORTUGAL, IPLB, 2000) mostly ignore the role of public libraries in supporting formal education, and indeed some of the references, if anything, show some hostility to the idea, stressing for example that supporting school libraries and university students should be done by someone else, not the public library. This was exemplified earlier in this section by a statement from a councillor about the support to homework centres and the shortage of seating places. The following story exemplifies an actual argument between a local authority and IPLB.

*I should tell you that when we were discussing with the Institute, I had an argument with the librarian that had the responsibility for this library. He clearly argued the following: your perspective is not correct because the public libraries are not to serve the schools. I said I am sorry but I deeply disagree. It is obvious that the National Library in Lisbon may not be to serve schools. But in a Municipality like ours, we have to provide services in this area, because there is a public, which is a high percentage of the population.*

(Councillor, medium size town, South of the country)

An apparent dichotomy emerges from the data of the present research. At the central level of the administration, some reservations may be found about the roles of the public libraries in supporting formal education. One reason for this may be the fact that in the central government education and culture (including libraries) are in different ministries, and the signs of interaction between the two departments are not apparent.

However, those working in the field appear not to share those reservations, and try to respond to the needs of the users as best as they can, and as was noted above, most of these users are schoolchildren and students.

## 7.7. Summary

This chapter discussed the perceptions of Portuguese librarians and elected members on the roles of public libraries in supporting formal education. The roles identified and discussed were:

- Support to the curriculum and the promotion of reading, by providing space and materials, staff support, and “animation” activities
- Support to school libraries, by the sharing of resources and expertise;
- Study rooms and homework clubs, by providing facilities and support for children to study and do homework;
- Support to teachers by providing training opportunities and facilities, as well as resources for teaching
- Support to higher education students, by providing a friendly environment to study and borrow books and materials.

The picture of the library emerging from the present research is distinctly characterised by a close relation with the educational institutions, with schoolchildren and students, and with teachers.

This is better understood considering the deficiencies of the educational system where the provision of library services is widely acknowledged as being poor across the country, with special incidence in some areas where school libraries are specially underdeveloped or new privately owned universities have been established.

Other factors considered to increase the need of public libraries supporting formal education are demographic as well as social and economic. The present study suggests that children in families with lower incomes and inferior housing conditions, and/or living far from their schools, are more likely to need the support of the public library.

The fact that public libraries support formal education is considered to bring advantages for both fields: it adds resources and services available for education while widening the catchment area of the public library service. It is also seen as a means of improving the public image of the library.

This study suggests that the perceptions of elected members and librarians are influenced by a set of conditions:

- The professional background of many respondents is closely associated with education;
- The socio-economic environment in which they live and work makes the formal educational needs very visible to them;
- The lack of resources of the public libraries may originate some worries and anxieties about the actual possibility of the public libraries fulfilling their roles;
- The absence of guidelines and of research on public libraries originates a lack of theory about their educational roles.

Other key issues relating to the support of public libraries to formal education have a managerial scope and are discussed in chapter nine. It should however be stressed now that, beyond the need for an increase of resources, and since this is a space of intersection of culture and education, concerted strategies need to be delineated both at national and local level. This would help in the clarification of roles and, after all, in the provision of better services for all those involved in formal education. This is so much more relevant as the number of these is increasing as we move towards a learning society.



## Chapter 8

# LIBRARIES, COMMUNITIES AND EDUCATION

*They are children at risk, they come from the poor neighbourhoods, and they get here a little bit of what they cannot get anywhere else. This is an agreeable space, where they have access to books, where they have a relationship with people, specially with the grown-ups, that they probably do not have even at home...*

(Librarian, medium size town, north of the country)

### 8.1. Introduction

The previous chapters have addressed the perceptions held by Portuguese librarians and elected members on the educational roles of public libraries. Such roles are traditional and well established, even if some aspects of them still raise doubts and concerns amongst the stakeholders.

In the present chapter the discussion moves to a field that, although not being completely new, has only recently attracted the close and widespread attention of researchers, especially in the United Kingdom: the social roles of public libraries.

This chapter focuses on the social aspects of the educational roles and on the specific conditions that may make these roles more relevant in that country. The public library is discussed as an institution providing opportunities for a social redistribution of the wealth of education resources and information available in society, constituting itself as a valuable educational asset, especially relevant for the most vulnerable members of the communities.

The chapter starts with a discussion of the relevance of public libraries in helping diverse sectors of the community in overcoming the barriers they may face in their educational development. The views of respondents suggest a consideration of the following groups: children and young people, adult learners, and especially vulnerable groups, such as the elderly, the handicapped and prisoners. Diverse

groups may face specific barriers, but, generally, these may be grouped in the following categories: economical, educational, geographical, individual and psychological.

The public library as a social space is discussed in section 2, which considers its use for meeting and socialising purposes especially by children and young people, as well as by the elderly. This socialising has educational outcomes, as the library environment facilitates work group for students and provides cultural activities for all age groups. Furthermore, some extension services, such as services to the housebound and mobile libraries, may play a vital role in helping people to overcome isolation, one of the barriers to education.

The roles of the public library in supporting people to learn about themselves and their communities are dealt with in the following section. These roles have diverse and often hidden outcomes: the present research suggests that, especially via the Local Studies Collection, the public library may help to create, develop and disseminate knowledge about the community in the community and beyond it. This fact has potentially relevant effects in raising the pride of the community in its own values and increasing its self-image and confidence.

Finally, the last section of this chapter discusses the reasons underpinning the visions of the respondents to this research. It is suggested that several factors may act in different and even contradictory directions. The low socio-economic level of many communities and the lack of other educational support may make these roles more relevant and distinct for the Portuguese librarians and elected members. On the other hand, the shortage of resources, the lack of theory and guidelines, and the reluctance of librarians in assuming non-traditional roles may limit these visions and jeopardise the potential of public libraries to play a significant part in enlarging the educational opportunities of the most vulnerable members of society.

## 8.2. Overcoming barriers to education

The perceptions of Portuguese librarians and elected members on the roles of public libraries in supporting education have been discussed in the previous

chapters of this study. Whilst the focus of those chapters was not on the social implications of these roles, they have indeed emerged frequently in responses to the interviews and in the literature. This section reflects on previous chapters, emphasising the different ways that the public library helps various groups in society, especially the most vulnerable, to overcome barriers to education.

These barriers may affect wide sections across the community. This study found that specially vulnerable groups include children, elderly people, the handicapped, the imprisoned, and the economically disadvantaged. Other groups, such as adults, even if made up of people that would not normally be considered disadvantaged, may also face barriers to improving their education. These barriers may be grouped in five major categories: physical or geographical, educational, individual, economical, and psychological.

### 8.2.1. Children's education and literacy

Children were considered by most respondents as deserving special attention and care from the public library. One of the reasons for this is the acknowledgement that most children may face special barriers to education and may be deprived from basic human rights. As suggested by Koren (1998): "In general, children have been silenced in history because they have an insignificant position in social life."

This research suggests that public libraries are in a privileged position to help children overcome barriers to education. Whilst many of the benefits which were obtained from the public library by children emerged as being associated with literacy and education, other advantages were also considered. The public library was viewed as a first step in integration into social life and citizenship. It is considered as one of the few institutions open to children on an egalitarian basis with adults (Kerslake & Kinnell, 1997). As one respondent said:

*I think that many things start in childhood. One of them is the habit of reading, the habit of using cultural spaces. The children's library may play a very important role not only in creating those habits of reading but also in giving the children the opportunity to become interested in cultural matters, in matters that may actually transform the child into a citizen.*

(Librarian, small town, Central region of the country)

The respondents generally saw the public library as a safe place where parents may leave the children while performing other activities. Besides, it was considered as having reliable and helpful staff, and a place where kids are expected to occupy their free time in a positive and stimulating learning environment. The following response illustrates these ideas.

*Sometimes we act as nurses and caretakers of the kids. Here, mainly on Saturday morning, parents leave the kids in the library while they go shopping and they stay here all morning.*

(Librarian, medium size town, North of the country)

If children in general may be deprived of basic rights in society, and not considered as full citizens, some special conditions may make them still more vulnerable. They may belong to an ethnic minority, may be affected by disabilities, or simply be discriminated against due to economic reasons. The following response provides an eloquent example of this situation and of how the public library may be a refuge for the poorer children.

*Talking about the children's section, I believe we do a good job, mainly because we have a special section of the of the child population that comes here. They are children at risk, they come from the poor neighbourhoods, and they get here a little bit of what they cannot get anywhere else. This is an agreeable space, where they have access to books, where they have a relationship with people, specially with the grown-ups, that they probably do not have even at home (...) They are very discriminated against, they are children that are nearly expelled from wherever they turn up. We have a group of about 15 kids, between 3 and 12 year olds, they come here and this works for them almost as a kindergarten.*

(Librarian, small town, south of the country)

This situation of the library acting as a kindergarten for poorer children was found in many interviews. In one case, the support goes one step beyond what has been previously mentioned to the actual provision of food and drink.

*We have many kids in the library coming from the poor estates and we usually give free tea to those kids. We have a certain notion of social security that goes beyond the role of the library. Presently it's the summer holiday and many kids do not have any other place to go, and they end up in the library. Some kids do have many wants. We have here two three year olds whose mothers sent them here on their own, and we act almost as a kindergarten. Kids cry and one of them has already fallen asleep in the children's room. Yes, we do have a caring role that is still more important during the summer. We do this in a discreet way. And the library is not any*

*poorer for giving bread and butter and a glass of milk to these kids.*

(Librarian, medium size town, north of the country)

Children may be affected by disease for more or less prolonged periods. The following response exemplifies the support of the public library to in-patient children in the local hospital.

*Another thing extremely important happened this year. We give support to the hospital. We go twice a week to the paediatric section, we take books with us, we work directly with the nurse, she takes responsibility for the books there and we take the responsibility of going there every Tuesday and Thursday to bring new books.*

(Librarian, medium size town, central region of the country)

A Portuguese author (Nunes, 1996: 165) highlighted the roles of the new public libraries in Portugal in providing children equal access to books, underlining the plurality of subjects and opinions made available to them by the public library. On another occasion, this same author specifically addressed social inequity due to different conditions of access (Nunes, 1994: 52):

*"These libraries may help to fight many cases of social exclusion, those who at home, with their families, have never had the special environments above mentioned. "*

Elkin & Lonsdale (1996) underlined the wide variety of situations that may affect children's lives. These may be influenced by factors such as economic and social background, physical and mental health, diversity in culture and religion, geographical as well as linguistic conditions. This is echoed by Eyre (1996: 178) who identified inequalities of children's access to library facilities "resulting from factors such as background, education, literacy and proximity to adequate library facilities." Kinnell (1996:168) underlined the importance of accessibility of services for children and the need for decentralisation through mobile libraries, especially to rural populations.

One example, underlying the social relevance of public library support to children hampered by distance and how the mobile library may overcome this can be found in the following response.

*We have some terrible situations of isolation. Some schools are difficult to reach some do not have a telephone or any means of contacting with the*



*outside world. If it were not for the library, the mobile library and the municipal library, the distance would be still greater and we would be increasing the divide between the child that lives in an urban centre or in a littoral zone and the one living in isolated areas where access to information is much more difficult...*

(Librarian, Medium size town, North of the country)

Another response illustrated how support with homework may contribute to counteracting the negative effects of distance between home and school:

*Many pupils come from the suburban areas, they come to town very early in the morning, and sometimes they leave home at 7 AM and are not back home before 7 PM. In many cases they have classes only during one part of the day, morning or afternoon. Therefore it would be very important if those study centres or rooms existed for them to have a study environment. The fact that they do not have classes during part of the day means that they have nowhere to stay, and during the winter it is very cold. It just doesn't make sense that a youngster of 15 or 16 has to go to a café to study.*

(Councillor, medium size town, Central region of the country)

Public library's support of children's education via homework clubs has attracted the special attention of writers and researchers dealing with the social impact of public libraries. The relevance of public library based homework clubs for children lacking conditions at home, namely a place to study, books and ICT, was highlighted by Train et. al. (2000). Bevin & Goulding (1999) pointed out:

*"Homework clubs were (...) often established in areas which were less affluent, with higher than average unemployment rates, a relatively poor economy, a large proportion of council housing, and which were in need of community facilities."*

A general benefit obtained via homework clubs is the raising of educational standards (Train et. al., 2000). Other benefits include improvements in self-confidence and attitudes to independent learning (Greenhalgh & Worpole, 1995) and of teacher-student relationships and information skills (Bevin & Goulding, 1999). Other relevant outcomes are the support obtained from library staff and the possibility of working in groups and with friends, which many children apparently prefer to individual study. Furthermore, the library may also provide opportunities for the interaction of children and grown-ups.

The importance of reaching children at an early age, of establishing a link between the children and the library, and of instilling the habit of reading, emerged very frequently in the responses to the present study.

*The children's library is the first step. It is the step where children start getting used to having a library, they learn how to utilise it throughout their lives, through their student years, through their working lives. Here they learn what it may be used for and what advantages they may have from using it.*

(Librarian, small town, Central region of the country)

The importance of the public library reaching children in a very early stage of life and involving parents in the process has been emphasised by authors such as Matarasso (1998a) and Eyre (1996:178).

Some special conditions were identified in Portugal that may make public library's support of children's literacy all the more relevant. These conditions are a low level of literacy amongst significant parts of the adult population, raising concerns about the extent to which many children have support from their parents, a circumstance echoed by Kerslake & Kinnell (1997).

The poor provision of school libraries, as discussed in chapter 7, is considered as another factor that adds to the relevance of the work of public libraries in this field. As one of the respondents said about the visits from school classes to the public library:

*It may be and sadly it is often the first contact children have with books.*

(Librarian, medium size town, Central Region of the country)

The present research suggests that public librarians and elected members in Portugal believe that the public library has a key role in supporting children's literacy and education. It may also be concluded that this role is more relevant in special circumstances that are generally found in Portugal. These are associated with social conditions of poverty and low educational levels, as well as lack of support from educational institutions, for example school libraries, and from parents. In most circumstances, children may be considered disadvantaged, as in society they are not considered to have the same rights as adults. Furthermore, some see their circumstances further aggravated by poverty, illness, distance, insecurity, or cultural

background. Public libraries may help children from different backgrounds to overcome a wide set of barriers to the fulfilment of their educational needs.

### 8.2.2. Lifelong learning

The perceptions of Portuguese librarians and elected members on the roles of public libraries in lifelong learning were discussed in chapter six, which concluded that they tend to predominantly consider unintentional learning and only marginally perceive purposeful or intentional learning. The reasons for this were also discussed and found to be associated with a lack of resources and of a tradition of lifelong learning in that country, as well as with lack of theory in this field, a reluctance of librarians to be involved with pedagogical issues, and a lack of public perception of the library roles.

The support of public libraries in lifelong learning was seen by the respondents as having significant social impacts. Whatever the conception of lifelong learning, many considered it as essential to individuals and communities, being both an individual and social responsibility, as exemplified in the following statement:

*Lifelong learning is a process that should be each person's responsibility. It should be assumed that learning is something essential to the progress both of the individuals and society in general, because the rhythm of the progress in science and technology in the modern world is astonishing, hence one is very easily outdated.*

(Councillor, medium sized town, Central region of the country)

Lifelong learners were considered to benefit from the public library primarily by attending “animation” activities, such as conferences, exhibitions and meetings with authors. Besides, they make use of public library resources, including space and facilities, books and other materials, as well as ICT. Furthermore learners obtain information and, to a limited extent, counselling and support from staff.

The social dimension of the support to lifelong learning, even under a limited framework, emerged from many interviews, indicating an awareness of its social implications. The following response illustrates this awareness by considering that the public library offers a second opportunity to those that for some reason did not complete compulsory education.

*The library has here a social function. Because of this: those people that are*

*doing self-learning, very often had no access to culture and formal education in the right time of their lives, meaning by "right time" the normal schooling years.*

(Councillor, small town, Central region of the country)

Some respondents highlighted equality of opportunities as a reason for the public library support lifelong learning.

*We live and work in a democratic society and we must provide equality of opportunities, and the library creates the possibility for people to have the same opportunities as those associated with a school.*

(Librarian, medium size town, Central region of the country)

The economic conditions, and especially the poverty of many families was another issue raised by the respondents, who considered that the public library should provide for the education of the poorer members of the community.

*There are people that do not have economic power to buy some books, and the public library is an important support to update people with the information they require.*

(Librarian, small town, Central region of the country)

The data suggest, and the literature confirms, that some especially vulnerable sections of the community are amongst the principal beneficiaries of library support of lifelong learning. These include the unemployed, cultural minorities and women returning to work (Green, 1995) as well as ethnic minorities (Comedia, 1993). These sectors are more likely to face barriers in accessing learning opportunities, and the public library may play an important role in reducing or even breaking these barriers, as suggested by Matarasso (1998a).

Research carried out in recent years in the United Kingdom has highlighted skills development as a major outcome of the participation in learning programmes in public libraries, including activities of the Local Studies services (Linley & Usherwood, 1998). Matarasso (1998b) mentions, amongst other things, administrative skills, experience of public speaking and IT skills. These skills are specially important for the above mentioned people, as they may help them to overcome some of their problems.

A particular outcome of lifelong learning identified by some responses was termed as "education for citizenship". This term considers the raising of awareness of

people's rights as citizens in a democratic society, the development of a critical spirit and habits of participation in social life. The fact that the public library is an open institution and reaches wide sectors of the community meant it was considered as being placed in a special position to foster these kinds of education.

*In our case, to support self-education, education after compulsory school, besides education for citizenship. We have lived in democracy for 25 years and I think that not much has been invested in education for citizenship. We do not have a challenging spirit, consumer rights is something that passes us by. I believe that the public library may have a very important role, mainly because I do not see many other institutions with the same access to a plurality of citizens as we have, which may support that education for citizenship.*

(Librarian, medium size town, North of the country)

Empowerment and confidence are other important learners' gains from public libraries. Research in the United Kingdom suggests that the public library works as a starting point where people, free from constraints and tight schedules, in a relaxed non-judgemental environment, feel encouraged to engage in learning activities and go on to attend more demanding and formal education (Linley & Usherwood, 1998). Matarasso, (1998b) found that people may feel encouraged to approach certain problems after being involved in library activities. Another apparent outcome is the development of social networks as people inevitably enlarge their social circle due to their involvement in library activities.

Stating that information is power may perhaps sound a commonplace nowadays. However the divide between information rich and information poor has often been remarked on and, as noted by Usherwood (1989:18), "...public libraries are potentially a means of establishing some measure of equal access to, and redistribution of, the wealth of information". The provision of information by the public library has then an impact on peoples' empowerment, as suggested by Greenhalgh & Worpole (1995) and Matarasso (1998b).

Galbraith (1995) in a commissioned paper given to an influential conference organized by the United States Department of Education on "Public Libraries and Community-Based Education: Making the Connection for Lifelong Learning", presented a comprehensive overview of the benefits of this connection. His



conclusion makes a strong case for both, but might be used to summarize the educational impacts of public library provision of open and lifelong learning.

"Through this merger, it has the potential to impact individuals, groups, and communities in the way they live, inform, and educate themselves. It can serve as a mechanism for self-fulfilment as well as for social, political, and psychological empowerment. When community-based education and lifelong learning is connected both conceptually and in practice, a unique relationship is developed that gives individuals and communities a sense of hope and dignity, a sense of responsibility for their own communities and lives, and a sense of voice within the social and political arenas. The connection suggests an inclusionary and liberating significance for individuals, groups, and communities. "

The primary focus of the present research is not on the social impacts of public libraries but on the perceptions that public librarians have of these impacts as far as education is concerned. It is apparent that many of the social outcomes of the support of public libraries to lifelong learning, as found in the literature, did not emerge from the responses to the present study. It may be suggested that this is associated with the partial conceptions of lifelong learning previously mentioned.

However it may also be suggested that, limited as it may be, this vision still considers some fundamental aspects of the roles of public libraries in supporting learners. They help individuals to overcome barriers to lifelong learning, such as time, finance, distance, and entry requirements. They were considered essential to individual and social progress, relevant to early school leavers and to the poorer members of the community, thus contributing to democracy, equality of opportunities and education for citizenship.

### 8.2.3. Adult literacy

The roles of public libraries in promoting literacy in adults did not receive the same consensus amongst the respondents to the present study as the support for children's literacy. Whilst there was general agreement on the idea that public libraries should support adult literacy, some doubts emerged on the possibility of the library being able to attract adults with literacy problems.

*Literacy is important, if we manage to catch those people, and this is the great problem. It is all very well to say that we should have that role; only those persons are reluctant or feel the library is not for them.*

(Librarian, medium size town, Central region of the country)

The literature on the role of public libraries in adult literacy contrasts sharply with the perceptions of the respondents, in spite of the fact that evidence of the reluctance of professionals towards adult literacy programmes in public libraries was also found elsewhere (Rolstad, 1990).

In chapter 4 of the present research it was suggested that high levels of literacy are generally associated with better life chances (OECD, 2000). Echoing this idea, Rolstad (1990: 246) stated that the adult's "lack of literacy skills may severely limit opportunities to improve their socio-economic situation", an idea confirmed by Ellingson (1998),

It has been recognised that adults may face special barriers to engaging in literacy development programmes. As McGary (1996) suggested, adults may resist admitting literacy problems, or, as pointed out by Ellingson (1998: 52), they may "not even recognise that they have a problem". Allen & Keene (1995) identified a "low perception of need, situational barriers and dislike of school" as some of the reasons for a high level of drop-outs in literacy programmes.

Bramley (1991) identified a wide variety of adults who may benefit from the support of public library services in helping to overcome literacy problems. These may belong to ethnic minorities, may be physically handicapped, have learning difficulties, or may be economically disadvantaged.

Consideration of all these factors makes the public library a most convenient institution for literacy programmes for adults.

As pointed out by Linley & Usherwood (1998: 24) "the public library could be an appropriate and non-stigmatised environment for specific initiatives on literacy", and can be used anonymously. DiAlesandro (1998:40) wrote: "Literacy is an enormous concept. It encompasses and suggests other words: freedom, responsibility, power, compassion, justice." All this words may be easily associated with the public library, and a logical connection may easily be drawn between public libraries and adult literacy.

DiAlesandro (1998) studied and presented some stories of people that had benefited from literacy programmes in public libraries. They "achieved their goals or continued working toward them; and benefited themselves, their employers, their

families and the community." The conclusions of these stories echo a suggestion by Kerslake and Kinnell (1998b: 6):

"By encouraging literacy skills, public libraries help counteract both existing poverty, by providing materials without charging, and prevent future poverty, by developing skills valued in the labour market."

The respondents of the present study, even when considering that the library could support adult literacy, considered this support in a loose and informal way, generally associated with promotion activities, and the possibility of the library organising adult literacy classes was readily dismissed.

*I think it is not very important at a formal level, because there are other organisations that have that specific role in continuing education. I think the library should be a space for informal education. But at the formal education level... To host some activities, may be, providing facilities... I think it does not go against what may happen in the space of a public library. But for the library to promote these activities at a formal educational level does not seem important to me.*

(Librarian, medium size town, South of the country)

One example of a public library co-operating with an adult education agency of the Ministry of Education is an exception that does not alter the general picture.

The present research did not find opinions amongst the respondents about the barriers that people may face in relation to adult literacy, or indeed about the possible outcomes of library support to adult literacy. This may be explained by a limited consideration of the issue amongst most respondents. The reasons for these perceptions may originate in a general conception of the public library as a place for children and young people, associated with the provision of materials to support formal education and that it should not get involved in the provision of formal education services.

#### **8.2.4. Computer skills**

One of the implications of the information society is the increasing reliance of ordinary citizens on computers for the most common activities of daily life. This obviously increases the relevance of the average citizen having skills to use computers in an efficient way in order to be able to conduct a normal life and not to be disadvantaged in society.

A report produced by the Portuguese Ministry of Science (PORTUGAL. Ministério da Ciência e da Tecnologia, 1997: 38) acknowledged the role public libraries may play in overcoming barriers to a widespread use of computers in accessing information:

"In Portugal, where in the overwhelming majority of homes, and even in many schools, books are scarce and the computer is not yet an easily accessible tool, public libraries may be and must be the open door to the new world of digital and multimedia information, the point of access to the cyberspace for those who, due to socio-economic and or cultural reasons, have not, in principle, the means to do it at home."

However, the responses to the present study, as discussed in chapter 4, suggest that there is as yet some distance between the Government's proposals and the perceptions of the respondents to the present study regarding the role of public libraries in supporting the use of computers and computer literacy in public libraries. It may be concluded that while some respondents acknowledged that computer literacy is increasingly important and that the library might have a role to play in this field, there was a widespread belief that other institutions in the community might be better prepared to develop computer skills. The poor provision of ICT in public libraries and the conception of the public library as an institution dealing mainly with books were suggested as reasons for those perceptions.

The respondents to this study are not alone in the reservations raised about this issue. Overbeck (1997) in a survey conducted at European level identified the main barriers to public libraries using new information sources and services. Amongst these barriers are librarians' attitudes and a lack of technical knowledge about ICT. This same study found that in Portugal less than 5% of public librarians had participated in training programmes. This may make the situation in the country more acute but by no means an exceptional case. The poor public perception of the public library as a centre to learn ICT (Benton Foundation, 1996) is another factor that may lead to a lesser acknowledgement of these needs and, crucially, of the roles that the library may play in this field. Furthermore, and in spite of this being a key issue for public libraries in the information society, Kerslake and Kinnell (1998b: 8) consider that it has not attracted much attention and consider the need for more research.

However, the developments which occurred in Great Britain during the 1990's stressed the relevance of public libraries supporting the development of ICT skills. The issue was addressed, for instance by the Croydon Libraries Internet Project (Batt & Kirby, 1996) and is crucial to the vision of the new library proposed by The People's Network (Great Britain, Library and Information Commission, 1997).

Usherwood, (1989), discussing the role of the public library in preserving the citizen's right to information, argues that technology makes this role more important, because:

“... an increasing number of our citizens will, in a very real sense, be handicapped, because they will be unable to afford the new technology, or because they will have not have developed the skills to use it” (p. 84).

It may be considered a recognition of these threats that the UNESCO Manifesto included “facilitating the development of information and computer literacy skills” among the “key missions” that “should be at the core of public library services”. The present research suggests that Portuguese public libraries, and indeed public libraries in other parts of the world, still have a long way to go along this path.

### 8.2.5. Especially disadvantaged groups

Public librarians and elected members in Portugal view the public library as an institution that plays an active role in helping some of the most fragile members of the community overcome barriers to education and information. Several examples emerged of actual work being carried out in supporting the incarcerated and the hospital in-patient. Other responses illustrate special attention given to disabled people, such as the visually impaired or the mentally handicapped. It should be stressed that whilst many of these activities are associated with reading, there are other obvious roles in helping people to fight loneliness and to cope with forced inactivity for sometimes quite prolonged periods of time.

The public library was generally considered as an institution that does not exclude any member of the community on economical grounds or social status. This is exemplified by the following response.

*What I said is because I believe in that perspective of a service that has to be democratic and create opportunities for everyone. We have had here*



*alcoholic, drug addicts... That does not shock me at all and I believe that they have a place here.*

(Librarian, medium size town, Central region of the country)

The rationale underpinning this inclusive vision has its roots in the public library tradition and is distinctly spelt in the IFLA/UNESCO Public Library Manifesto:

*"The services of the public library are provided on the basis of equality of access for all, regardless of age, race, sex, religion, nationality, language or social status. Specific services and materials must be provided for those users who cannot, for whatever reason, use the regular services and materials, for example linguistic minorities, people with disabilities or people in hospital or prison. "*

The IFLA Guidelines (IFLA, 2001), developing this idea of universal access, identify individuals and groups of people with special needs amongst the users of the public library. These include people from different cultures and ethnic groups, people with disabilities, housebound people and the institutionally confined. This document goes on to present a detailed list of services and materials that the public library should make available specifically to these users.

### A) The elderly

A number of respondents acknowledged the role of the public library in helping the elderly overcome barriers to education. The following response is an example of how elderly people, living in a home, benefit from the interaction with young people in the context of a library project:

*Beyond schools, we co-operate with homes for elderly people. This year we had a very exciting experiment that I am sure will continue. It was a workshop of storytelling with a group of young people. They are high school students but they are doing it on a voluntary basis. We invited some elderly people from that home to come and listen and tell stories. It has been a very exciting interchange as they come to listen and then they tell their own stories. We also work with the Day Centers and with APPACDM.*

(Librarian, small town, Central region of the country)

A set of circumstances may make a growing number of elderly especially vulnerable. These circumstances include finance, health, accommodation, and the higher probabilities of having to cope with all these problems on their own. The public library may develop services to help them in overcoming many of these

barriers: educational services at diverse levels and information services on finance, health and employment opportunities (Bramley, 1991).

The next section of this chapter will discuss the use of the public library by several sectors of the population, including the elderly, as a meeting and socialising point. The data suggest that elderly people prefer some sectors of the library, as the periodicals and the local studies collection, and use them to obtain information and educate themselves, as suggested by the following response:

*In our library we have a section of periodicals and mainly elderly people frequent it. It is an informal way of learning, because there is nobody teaching there.*

(Councillor, medium sized town, North of the country)

An example emerged from the data of one public library, through the work of the Local Studies services, collecting and recording local folk tales amongst the elderly, organising sessions of storytelling and publishing a book, thus contributing to the preservation of oral tradition. There is evidence to suggest that other libraries have followed this example.

*The public library has an active role in society by working with the schools, with the young people as well as with the elderly. It has to do with the preservation of our cultural traditions, as we have been doing here with the folktales. This is just an example. We started collecting the tales, we published a book and have had many sessions with the elderly of the municipality*

(Librarian, medium size town, Central region of the country)

These activities match the findings of research carried out in the United Kingdom. Matarasso (1998b) stressed the relevance of library activities such as local history and reminiscence for the enrichment of leisure time and education of diverse groups, especially the retired and the elderly. This was also one of the findings of the investigation of Linley & Usherwood (1998: 35-36). This study also found examples of how reading helped people to cope with loneliness, especially in isolated communities, and in coming to terms with bereavement, situations more likely to affect aged people, an idea corroborated by Greenhalgh & Worpole (1995).

Housebound services play an important role in the provision of books and information to many elderly people. Furthermore these services have been seen as

a vital connection for many isolated people with the outside world. (Greenhalgh & Worpole (1995). Many of the respondents to the social audit study (Linley & Usherwood, 1998; 34) praised the work of the housebound services highly, considering them as a "lifeline" for elderly and disabled people.

It should be noted that no example was found in the interviews or in the literature of public library services to the housebound in Portugal, but there is evidence of some work in connection with homes for elderly people.

The present study suggests that public librarians and elected members in Portugal consider that the public library may help elderly people in overcoming their barriers to access education and information and provides opportunities for much needed social interaction.

## B) The handicapped

From the data of the present research it emerged that handicapped people also receive a special attention from some public libraries in Portugal. This is apparent in the co-operation with special schools and institutions that support the disabled, namely the blind and the mentally handicapped. A particular case emerged from the responses with a special service supporting reading for blind people, by tape recording a national journal and distributing it throughout the country alongside books in Braille. The educational outcomes of this work are very apparent.

*One thing that our library does, and which is very important in people's lives is the sector for the blind. We provide a unique service in Portugal. We publish as a tape recording the "Grande Reportagem" [a national journal] for the blind of our country and others countries such as Brazil. I believe it is a very important sector, not so much because of the numbers but due to the kind of people that benefit from it.*

(Councillor, medium size town, Central region of the country)

The Portuguese Guidelines for the building of public libraries (PORTUGAL. IPLB, 2000), although not giving specific indications about the activities of the libraries, are permeated with recommendations regarding people with disabilities. Stating that all the inner and outer spaces of the libraries should observe the legislation regarding the disabled, they go on to provide detailed instructions about counters, toilet

facilities and lifts, thus indicating a special attention to disabled people, at least in the architectural aspects of the library.

These Guidelines incorporate the statement of the UNESCO Manifesto:

"Services have to be physically accessible to all members of the community. This requires well situated library buildings, good reading and study facilities, as well as relevant technologies and sufficient opening hours convenient to the users. It equally implies outreach services for those unable to visit the library. "

A key issue of relevance for the disabled is the location of the library, an aspect that is especially considered in the Portuguese guidelines. Kerslake & Kinnell (1997: 3) found that the public library is active in many areas of interest for people with disabilities because their locations are as a rule central and easy to access and collection development policies generally take into account disabilities such as blindness and visual impairment. Furthermore public libraries provide health information needed both by those who suffer from disease or disability and by people in good health. Echoing the Portuguese guidelines, new or refurbished buildings in the United Kingdom and other parts of the world have taken into account the access needs of people with physical disabilities (Denton, 1996; Linley & Usherwood, 1998; Stevenson & Collison, 1996).

Visually impaired people have been a special focus of attention in some Portuguese public libraries. Adding to the above mentioned example, Guerreiro (1992) reported on a project in the Municipality of Lisbon with a special library and information service (including the publication of a monthly audio review) aimed at the visually impaired.

In spite of Hopkins' consideration (1994:57) that library services to visually impaired people in the United Kingdom have been "piecemeal, fragmented, inconsistent", there is evidence of a growing concern of public libraries regarding the visually impaired. The partnership Share the Vision was established in 1989 aiming at the promotion of the public library as an access point of the visually impaired to library and information resources (Craddock, 1997). It is not without significance that the Library Association published national guidelines for the visually impaired people in 1996, which recognise that "services for visually impaired people are high on the

[public library] agenda". In spite of these and other efforts, the provision of library service for visually impaired people were still considered inconsistent and lacking in many aspects by a survey carried out by the University of Loughborough (Kinnell et. al., 2000).

Another suggestion of this growing interest is the attention that the issue has recently attracted from researchers. Two examples are the survey by Kinnell et. al., (2000), who assessed the levels of provision, and Brophy & Craven (1999) who adopted a wider perspective and proposed the creation of a National Accessible Library Service.

Visually impaired people require from the public library the same educational support as any other user. However, their handicap makes special media and equipment, such as documents in Braille, talking or large print books, or special devices for computers necessary (Machell, 1996). These users also need an increased level of support and guidance as well as special means of access (such as the telephone) or delivery, such as mail delivery (Sjöstedt, 1990). Talking books have also been used in supporting the reading needs of other disabled groups, such as the mentally and physically handicapped, the aphasic and the dyslexic.

It may be argued that Portuguese public libraries still have a long way to go in helping the handicapped to overcome the barriers they face in accessing education opportunities. The issue was acknowledged and taken into special account as far as the buildings are concerned, but the provision of services in that country could indeed be considered "piecemeal, fragmented, inconsistent", especially in comparison to developments in other countries. However there is recognition of the issue and the work that is already being done in this field could be the basis for future developments to be built on.

### **C) Prisoners**

A group that is, for obvious reasons, prevented from attending the public library regularly is prisoners. Some respondents identified the support to inmates as a social and caring role of the public library, and having an educational significance. In these cases, the library provided fiction as well as information.



*I am also responsible for another project in the school-prison. I just did some files because we can not have direct contact with the inmates. I organised some files with Xerox copies of book covers and abstracts of the books, considering the level of schooling, which is very low. It is just five or six files with the bibliography, and I am now waiting for them to communicate to me which books they want so that we can bring them there.*

(Librarian, medium size town, central region of the country)

*Another thing is the service of reading to the local prison, which is hugely acclaimed by users. We go there every Wednesday morning but they would like us to go more often. We request a van and take a trolley with books and exchange them with those borrowed the previous week. As a rule what we bring them is never sufficient, and they ask us for old journals that we no longer use in the library. Otherwise they would never have access to these journals and magazines. They have a bulletin board and asked us for information, I mean it is us who bring them the news, materials for them to put on the board. They also do some tapestry, Arraiolos carpets, and we bring them the books that they use to make those carpets.*

(Librarian, medium sized library, North of the country)

Both the UNESCO Manifesto and the IFLA Guidelines specifically consider imprisoned people in the group of those who cannot use the regular services of the public library, thus deserving special attention and specially designed services. However, the most recent research on the social impact of public libraries did not consider this group, in spite of the existence of an established tradition of prison libraries in the United Kingdom.

The Library Association published guidelines for library services to prisons in 1981 with a second revised edition in 1997 (Collis & Boden, 1997). This document provides a comprehensive overview of the services required with chapters on facilities and equipment, materials, staffing and management.

The rationale for this kind of service is that "libraries have an important role to play in the development of positive regimes" of imprisonment (Collis & Boden, 1997: 19). Stevens (1996) studied the role of the prison library in the reform and rehabilitation process and concluded that "the prison library is not just an exercise in humanity, but has always had a role in the rehabilitative process" (p. 466).

The relative importance attributed to the prison library service has been associated with diverse philosophies underpinning the purpose of incarceration. The role of the library is more important when there is an emphasis on rehabilitation rather than

punishment. Sullivan (2000) considers that the present dominant philosophy in the United States is imbued with ideas of punishment, confinement, vengeance and even exclusion, a landscape where the prison library's role is threatened and limited. Stevens (1996) focused on rehabilitation, and Lehmann (2000:124) considers that "today most Western nations attempt to strike a balance" between these two paradigms of prison service.

The literature agrees on the idea that the library and information needs of incarcerated persons are the same as those in the outside world (Lehmann, 2000). However, they may be considered disadvantaged because they do not have physical access to the public library and indeed to many other services. Furthermore, imprisoned people are affected by high rates of illiteracy, mental illness and emotional instability (Nyeng, 1998), and low educational attainment. As Lehmann (2000: 124) pointed out:

"One can say that incarcerated persons have a large number of unmet needs, which translate into a high demand for information, learning materials, and self-improvement resources..."

Stevens (1996) found that the prison library plays a key role in the education of inmates and has an empowering influence. Green (1995) describes how inmates in Staffordshire's prisons were using open learning packages from the prison library, and how these materials had been chosen to develop self-presentation skills and to improve job prospects.

A survey of the population of Wayland (Norfolk) prison found that half of the inmates were regular library users, with a high percentage of heavy readers (Joel: 1990). Lehmann (2000) wrote that inmates use the library up to 10 times as much as people on the outside. As Stevens (1996) concluded:

"The act of reading could help in fostering the development of reading abilities and reducing adherence to rigid thinking patterns, while promoting abstract thinking and critical reasoning" (p. 476).

The provision of information emerges from the literature as another key function of the prison library. According to Stevens (1996: 476):

"Library resources could be used to provide the inmates with access to an enlarged knowledge base, to assist them in making more informed and independent judgements and to act less impulsively."

However, some special characteristics distinguish information provision in prison libraries from that in the normal public library setting. Those libraries may be an important legal information centre and community information centre for the prisoners (Lehmann, 2000). On the other hand, the prison library is affected by special problems regarding free access to information, because of the specific conditions of imprisonment of their users (Nyeng, 1998; Sullivan, 2000), with librarians having to find a delicate balance between professional ethics and prison regulations. A major problem in this field is the use of ICT, and specially access to the Internet, which may raise special security problems.

The comparison of the literature on prison libraries with the data obtained by this study highlights again how public libraries in Portugal may be considered to be in their infancy. The reference to prison libraries was not really made by any respondent, and what the data suggest is a minimal, albeit valuable, level of provision and support with some social and educational significance. As with other aspects approached in this research, this one needs a much more structured approach with proper planning and financing, and more research would also be essential to underpin the necessary changes.

## **B) The economically disadvantaged**

The data suggest that amongst respondents the public library is viewed as playing a crucial role in providing access to books and information to the less favoured members of the community to whom economic barriers might prevent access to information and knowledge.

*We do not want to have a divide, a brutal rupture between those who have access to information, a small minority, and those who live completely ignorant of all this, because otherwise we would not be fulfilling the aims of the public library as a space of democratisation, as a space of tolerance, of access to everyone independent of their economic conditions.*

(Librarian, medium sized library, South of the country)

It should be stressed that as a rule the services of public libraries in Portugal are free to the user. No fees are charged for any kind of lending, such as books, and audio-visual materials, nor for any of the activities, such as workshops or conferences, and overdue fees are rare. Photocopying is generally charged for, and

the payment for access to the Internet is charged in some municipalities whilst in others it is not. Furthermore, it is common that visits from schools or other groups use the transport provided by the local authority, so even this is free, as illustrated by the following response.

*We have support from the educational services of the municipality, which provide the transport for the programme of animation.*

(Librarian, small town, Central region of the country)

Information and Communication Technology, whilst having an enormous potential to provide wide access to information, has also been considered as presenting potential threats to social equity, due to the costs and individual skills involved in their use. The respondents to this study considered that the public library had a key role to play in democratising the access to information and knowledge through ICT, as illustrated in the following response:

*Computer resources allow for a democratisation of access to the information resources. Therefore, the social function of the library is also fulfilled when it provides computer resources for many people that otherwise would not have access to them.*

(Librarian, medium sized library, South of the country)

Furthermore, other advantages of accessing digital information through public libraries, beyond the democratisation of access, were also identified. The following response illustrates the belief that information technologies may be better used in a social environment, as a way of preventing the dangers of isolation that technology may bring, with the further advantage of having support available.

*We have many youngsters that are really interested in computers but do not have the economic capacity to have one at home. And we can see it in the library, they go there to use the computers. Computers have one serious drawback, which is the fact that people are alone, interacting with the machine, and forgetting about other human beings. And there are cases, I know of cases of women accusing their husbands of being focused on the machines. If it is possible to do that in another space, out of the home, where there are other people, there are more interactions with other people. It is not only the man and the machine... and there is the technical support.*

(Councillor, medium size town, North of the country)

Echoing this idea, Usherwood (1989: 89) warned against the negative impact that technology may have on our patterns of social interactions, and went on to quote

Max Frisch as having said that technology "is the knack of so arranging the world so that we don't have to experience it."

The discussion about charges for using ICT and namely accessing the Internet has been going on amongst library professionals for some years. The price of telephone calls has been a major argument, especially in those cases, as is still common in Portugal, where access is via dial up connections. This research found a mixed picture, in which some libraries have fees whilst others do not. Instances were also found with a mixed situation where some accesses were paid for and others were free, although in the latter case there were restrictions on this kind of use.

*We have two Internet connections. One has to be paid for, we only charge for the calls, although kids have a discount with the Youngster's Card. The other one has been installed by the Ministry of Science and is free, but this one is reserved only for research and chat is not allowed.*

(Librarian, medium size town, North of the country)

Distance may be another barrier to an equal use of the library. Mobile libraries were identified in the previous chapter as elements for the provision of support to formal education. However they were also considered by some respondents as a means of bringing books and information to distant vicinities, and to those disadvantaged by distance from the centre of the town and from the library.

*The library fulfils its role well in the community, especially with the less favoured – and I am thinking about our mobile library which has a very important role indeed. We are considering buying another one because this one is no longer coping, because ours is a very large municipality, with many parishes, and, sometimes, there are users that are not served simply because there is not enough time.*

(Librarian, medium sized library, North of the country)

Poor people living in the countryside share many characteristics of the urban poor, but may be still more disadvantaged by distance, isolation and dispersion. As Boyce & Boyce (2000:50) point out "... the rural poor are disadvantaged electronically as well as economically". For these communities mobile libraries may be one of the few connections they have with books and information as well with the new possibilities opened by ICT.

Several authors have underlined the fact that the public library is a public space, one "which people can use as a right, for free, and which [is] in many ways felt to be held



in common ownership and open to all" (Greenhalgh & Worpole, 1995: 12). Public libraries are included in this set of public spaces, and this makes them invaluable particularly for those members of the community with a lower income, the unemployed, or those living on benefit. Further hardship may still be brought by specific situations such as homelessness. Linley & Usherwood (1998:67) underlined "... the impact of free access to materials, especially those for education..." in the poorer sections of the community. Proctor et. al. (1996) studied the impact of public library closures in Sheffield and concluded that

"... the library may be particularly significant as a community resource in communities where unemployment is high and access to other resources, including financial resources, limited." (p. 38)

Unemployed people are amongst those more likely to suffer from low incomes, and may find help in the public library services to overcome educational barriers (Featherstone (1992: 150). As Kerslake & Kinnell (1998b: 4) wrote: "Rather than writing unemployed people off, then public libraries have the resources to work with and for them". However Linley & Usherwood (1998) found only a "potential relevance of libraries to unemployed" (page 68), and indeed some of their respondents were doubtful about their possibilities of being helped to find a job by using the library services.

Some of the more vulnerable poor in urban areas are homeless people, and there is evidence that they look for much more than books in the library. Homeless people may see the public library as a safe, warm and dry place where they can meet and talk to people, besides reading books, journals or accessing the Internet. Some public libraries in the United States offer a diverse set of programs to homeless people (Grace (2000).

The present research suggests that the economically disadvantaged may benefit greatly from public library support in Portugal and in other parts of the world, as one of its main features is the free provision of services. The introduction of fees for some services has been much discussed in other countries, but for the time being, in Portugal this solution has been adopted only on a minimal scale. This may be due to the acknowledgement of the poverty of many families, to the consideration of low levels of literacy, and to the relative newness of public libraries, which are still

seeking recognition and acceptance. In any case the public library may be an oasis of free services in a society where these are increasingly rare. In Portugal they attract and help some of the poorer members of the community in overcoming barriers of access to education and knowledge caused by economic hardship, as demonstrated in this and in previous sections.

### 8.3. An educational and cultural meeting point

The public library was considered by many of the respondents in the present study as a place where people of all ages may meet free of constraints, socialise and interact. It is, however, a special meeting place with a set of positive connotations, generally associated with culture, education, and the enjoyment of arts. The following response illustrates this idea relating to young people, and it comes from a library where, according to the respondent, a wedding ceremony had actually taken place.

*Although there is the idea that the library should be a place of silence because people are working, I think that the library becomes a meeting point. It may even be a place to find a boy or girl friend. This happens in this library and I think it is interesting. It gives the library another atmosphere, another warmth that is not only that institutional thing. Besides the information they find in books, there are other kinds of information people get from talking and discussing with each other.*

(Librarian, medium size town, Central region of the country)

The fact that the public library was considered as an agreeable and comfortable place was mentioned over and over again. One particular space in the library, the periodicals section, was previously mentioned associated with lifelong learning, but some respondents also considered it as a good space to meet people, in this case especially by the elderly. Furthermore, an egalitarian dimension is often considered, as the public library provides the possibility of reading newspapers and magazines to people that otherwise could not afford to buy them.

*They find here an agreeable and comfortable space, where they obtain the information that sometime ago they would not have been able to find. And they would have had to buy the paper and some could not afford it. And the library filled this gap.*

(Librarian, medium size town, North of the country)

The idea of the public library as a meeting point for young people was often emphasised, and, in some cases, this was the only reason why the users visited the library, not to make use of any other service.

*They now see this space as one where they may stay and talk. They come into the library and use it as a space, a place to meet friends that come to the library and it ends up becoming a meeting point. Sometimes they use the library for other purposes such as reading or borrowing, but other times they just come in, meet and talk with friends, and go out without having touched a book or a revue.*

(Librarian, medium size town, North of the country)

The socialisation of younger users was also associated by some respondents with the activities of reading promotion. Furthermore, as exemplified by the following response, these activities may also instil attitudes of tolerance and acceptance of differences in youngsters, even if only of supporters of different football teams.

*I could give you an example: a meeting with a famous football player in the context of a workshop about professions. It may be a pretext for sociability and intercourse of supporters of different teams, for instance dressed with the jumpers of the teams... After this a bridge may be built between this event and diverse kinds of reading. I believe the library may be a very important space for socialisation. On the other hand, the participation, the involvement of a youngster in several activities is another way for them to exercise their sociability. We don't do things by ourselves, not even for them, preferably we do things with them.*

(Librarian, medium size town, Central region of the country)

Allowing young people to meet and talk with friends is seen as having some advantages for the public library as it attracts people that otherwise might never enter the library.

*I think it is a way of attracting youngsters to the library, and, besides, providing an agreeable space where they can meet and talk, and where they may also listen to music, see a movie, read a magazine or a newspaper. Therefore I believe the library fulfils physical and structural conditions allowing for that meeting of youngsters.*

(Librarian, small town, Central region of the country)

The elderly are another group that are viewed as using the public library to meet and interact with children and young people, and to avoid loneliness.

*And it is somehow a way for them to find company. Some people spend the whole day here. They are retired, they do not like to spend their time on the*

*garden bench and so they come to the library.*

(Librarian, medium size town, North of the country)

The respondents considered some particular spaces of the library especially suitable for people to meet and socialise. These include the coffee shop, when it exists, entrance halls, verandas, courts, wide corridors, exhibition rooms and auditoriums. Some activities are also seen as providing opportunities for socialisation. These include debates, meeting with authors, seeing movies and listening to music. The following response highlights the importance of the library's coffee shop for the socialisation of youngsters.

*The library, the whole of the library must evolve in that direction. The public library must evolve to become a great space of citizenship and socialisation. The coffee shop in this library is a great space of socialisation. That's why I defend that public libraries - of a certain size - should always have a coffee shop where that sociability may take place in a very uninhibited way, and without disturbing the normal functioning of other services.*

(Librarian, medium size town, South of the country)

The involvement of people in library activities inevitably puts them in contact with other members of the community with similar problems, concerns and interests, providing an opportunity to make new friends. Social mobility leads people to move frequently to new towns and the public library may be an important place for these newcomers to get in touch with community life (Matarasso, 1998b).

Although the public library is seen as a good socialising space, many responses considered it as different from many other places where people usually meet. A positive connotation is added, associated with the enjoyment of diverse artistic forms, such as theatre, poetry or painting.

*I think that libraries are dynamizing culture. We have had theatre, and it is in the library; perhaps there are no other spaces. And theatre may lead to other things, we have had meetings of poetry. The library is a cultural focal point...*

(Librarian, medium size town, North of the country)

*We do documentary and bibliographic displays in the hall (...) And we have the Art Gallery permanently. Last Monday I went there to inaugurate an exhibition by a young local painter, and the library was full of people who attended the inauguration. All this makes people come to the library... We have a café, a large room for conferences...all this attracts people. When people go there for the first time they are very impressed with the library...*

(Councillor, medium size town, Central region of the country)

*The library has been able to impose the cultural agenda in our town. This was a town where things seldom happened, especially anything of quality, and now we have many things with quality, and with an interesting aspect: we have attracted many diverse groups.*

(Librarian, medium size town, South of the country)

The literature provides abundant examples of the use of the library for socialisation: it is considered as a meeting place mainly by young people and older adults, as an institution helping to overcome social isolation and contributing to meeting and common understanding of diverse cultures.

A case study by Monteiro (1999) found that in the public library of Beja, Portugal, the "need for socialising" was identified by 43% of the respondents to her inquiry as a reason to visit the library. This need rated third, "scholarly needs" being the first (69%), and "professional needs" second (49%) (p. 44). This echoes research carried out in the United Kingdom by Comedia (1993: 29-30), that suggested that one of the reasons why students preferred the library as a place to study was that they enjoyed studying with friends. Besides they also found that the library was used as an "alternative 'common room', preferring to spend free periods in the library rather than at school."

Elkin (1996) summarised the role of the library as a meeting place for individuals and cultures thus:

*"Today, the public library fulfils a complementary social function through its programmes of activities, promoting social interaction among young people, between children and other groups in the community, while fostering an awareness of the culture of others." (p. 66)*

Matarasso (1998b) pointed out that libraries have been "easily caricatured as solitary places which discourage human contact...". Research conducted in recent years in the United Kingdom provides abundant proof to contradict that preconception, and actually points in the opposite direction. Public libraries do make a significant contribution to overcoming social isolation as demonstrated by Linley & Usherwood (1998) and by the Sheffield library strike study (Proctor et. al., 1996).

Besides being considered as a meeting point for people, the public library may also play a role in the meeting and common understanding of different cultures, as suggested above by Elkin. This may be done by providing materials for all sections



of the communities, for example exhibitions (Linley & Usherwood, 1998), and newspapers and magazines in appropriate languages (Kerslake & Kinnel, 1997). However, other authors raise doubts about this issue considering that "developments in race equality and ethnic diversity within public library services have been largely ad hoc and progress has been limited" Roach and Morrison (1997:166). Hellman (1990) reports on difficulties of provisions, funding and national guidelines in Sweden.

The data of the present research generally match most of the aspects found in the literature, indicating that the vision of Portuguese librarians and elected members fit in the general framework of public libraries in other parts of the world. The only exception to this picture is the lack of consideration of Portuguese public libraries as a meeting place for cultures, limiting this aspect to the meeting of individuals. Further research would be necessary to clarify the reasons for this, but two main factors might be suggested: firstly, Portugal is not so ethnically diverse as other countries in Europe, including the United Kingdom, secondly, multiculturalism has not been much discussed amongst the library profession in the country.

This study suggests that the consideration of the public library as a meeting point has relevant educational dimensions. Both the literature and the respondents agree on the use of the library as a qualified meeting place, used by a variety of people from all ages, with special significance for children, young people and the elderly. These users appear to utilise the public library for a variety of purposes with the particular focus on meeting other people. While this may be a goal in itself, it is usually associated with participation in library activities, such as projects, using the space and materials accompanied by friends, or attending cultural events. In summary, the public library emerges as an educational social space.

#### **8.4. Educating people about themselves and their communities**

The data obtained for the present research indicate that in Portugal there is a widespread belief amongst elected members and librarians that the public library is a major source for people who want to learn about their communities both in past and present times. It plays a key role in promoting local identity, especially noticed

by a sense of pride and ownership of the public library by the community and in the contribution of the Local Studies services to the preservation of local memory and identity. Furthermore, there were suggestions that these communities shared a sense that the public library, although being owned and run by the Municipality, was something that belonged to them. In addition, the library is considered as an important support to local writers and artists as well as to local associations, contributing thus to local education.

Many public libraries were recently created, and thus do not have a large Local Studies Collection. Nevertheless, a number of libraries have been created over a longer period of time and thus have been able to build a collection of materials with diverse kinds of data about the community throughout the years. Furthermore, even in the newer library, there are indications that this is a role considered from the outset, and the building of this collection has gained an increasing importance in the work of the library. The data of this research indicate that the respondents are aware of its significance and value for the local community.

*The second issue that comes to mind when considering the educational role of the library is in terms of the role of the library in a specific region, the dissemination of what is the culture of that region. I think specifically of the Local Studies and the dissemination of those collections as well as the use people make of it. I think about the dissemination that the library does in order to pass that information on to the community where it is embedded.*

(Librarian, medium size town, South of the country)

In spite of the importance attributed to the Local Studies Collection, it also emerged from the data that constraints have, in some cases, hindered its full functioning.

*I think we are failing in the Local Studies Collection, as ours is not yet available to the public. And because of this, access to it is restricted to those who know exactly what they want. It is now being processed, but up to the present it has not been available. It was not catalogued, it was not on the computer, and thus it was not available. It is now being processed, I think it is late, but we have not had any possibility...*

(Librarian, medium size town, North of the country)

The discovery or rediscovery of community roots has a relevant impact on the way people see themselves and others, contributing to a sense of ownership and pride exemplified in the following response:

*One thing that is very important is that people feel the library is something that it is theirs, which they own. People bring people from outside just to come and visit their library. To visit it as if it was some kind of monument for them to see.*

(Librarian, medium size town, South of the country)

Examples also emerged of work carried out by or supported by the library of work aiming at the identification of literary references to the town. The role of promoting the local image and identity is very apparent from these activities as they associate the town with major past and present writers.

*The Group of Friends of the Municipality of [...] works in the domain of culture and heritage of the Municipality. Presently there is a partnership with the Municipal Council through the public library for the publishing of a book about [...] in the literature. I am sure that this book will have educational outcomes for the entire municipality.*

(Councillor, medium size town, Central region of the country)

This sense of ownership was also found by Linley & Usherwood (1998:42-43) in the communities involved in their research. Matarasso (1998b:35) found that the activities organised by the library "are important in strengthening local confidence in the value of a community and its people." The opening of a new library is certainly a moment of pride in the communities, as suggested by Linley & Usherwood (1998) and widely and frequently confirmed in the recent Portuguese national and local press.

Nunes (1996), in a chapter of his book, significantly entitled "The library and the memory of local life", discussed the Local Studies collection, but focused mainly on technical and organisational aspects. He suggested that one of the reasons for the growing demands put upon this service is the fact that "people are increasingly interested in discovering their roots, in finding their identity". (p. 129) He went on to defend the importance of this particular service mainly on the grounds of the preservation of local History, and suggesting that libraries should pay special attention to the oral tradition:

*"It is said that the death of some people means the loss of real living libraries (small local history, oral tradition, folk tales, etc.). The library may keep these elements by making sound or audio-visual recordings, that will be unique documents for the reconstitution of the life of the community, and for the preservation of the oral tradition, mainly the literary one." (p.135)*

In a period of economic as well as cultural globalisation, the public library is a vital local resource to preserve local identity and culture. The responses given to the present study gave abundant examples of how this may be done. The data from Portugal are echoed in the UK and international literature (IFLA, 2001).

Local Studies collections may hold a wide variety of materials, such as collections of local newspapers; locally produced books, leaflets and brochures about every aspect of local life; audio-visual materials; posters, photos and postcards, personal and institutional archival materials. Besides the function of conservation, Local Studies services organise activities aimed at the promotion and dissemination of this wealth of information. Furthermore, associated with these materials and activities, the public library often acts as a local publisher of primary or secondary sources of information, for example catalogues or reprints of relevant out of print materials, unlikely to attract the interest of commercial publishers (Greenhalgh & Worpole, 1995).

These materials and activities play an important part in fostering local image and identity and are a valuable information and educational resource. Linley & Usherwood (1998: 44) suggest that this is especially relevant in the smaller communities where the library “seemed to have an impact out of proportion to their size”, or in towns that have gone through rapid processes of transformation.

School children may be another group of users benefiting from the Local Studies services. The emphasis on project work often originates investigations on local aspects, such as local personalities of the past, names of streets and buildings, sports teams or disappearing industries. The use of the library services allows them to learn about their locality and ultimately may lead them to better social integration.

Local writers and artists have benefited from the support of the public library, according to the respondents of this study, as illustrated by the following responses:

*We always try to have temporary exhibitions, we then have a seminar or a talk at least once a month, and we launch books mainly from authors of the region. We have sets of movies, each month with a certain theme.*

(Librarian, small town, Central region of the country)

*We have continuously promoted local artists, but not only local. A permanent exhibition of art I consider fundamental. I think that it is good that people get*

*used to going to the library also to see exhibitions. We also have an auditorium, which works very well. All the population of the municipality already got used to having an open space for discussion of ideas, which is fundamental.*

(Councillor, small town, central region of the country)

The collaboration with local community groups was identified above in relation to the promotion of the local image. However this collaboration may be extended to a wide range of activities and subjects, with the public library providing space and helping with different aspects of the organisation

*We do much work with the cultural associations, collaborating in the devising of exhibitions, by providing information materials about a certain subject, by providing library space for the exhibition, by promoting and disseminating events... Associations are usually very short of resources and they ask the library. We do the work of publicising in the media; we make or help in making the leaflets. And we have a rule in this library: Any activity taking place in the library that is not originally organised by us, I mean when an association asks us to do something about any subject, we always produce a file with information about that subject and make it available in the auditorium. And we always have a display about the subject. As a matter of fact when any association asks for our support they expect us to do this.*

(Librarian, medium size town, North of the country)

This research suggests that both in Portugal and other parts of the world, public libraries play a distinct role in helping people to learn about themselves and their communities. Local Studies are a much appreciated service in most parts, and attract many local people interested in studying local cultures and traditions, including the oral tradition. They are also used by children, young adults and higher education students to help them in their assignments. Public libraries contribute to raising awareness of local values and traditions, contributing to the promotion of local image and identity and raising interest for it.

## 8.5. Discussion

This chapter addressed the Portuguese librarians' and elected members' perceptions of the public libraries' roles in facilitating access to education in their communities. Public libraries were considered to play significant and positive roles in helping people to overcome the barriers that may hamper their educational



development. This was considered to be particularly relevant for people facing special circumstances, such as children and elderly people, the handicapped, prisoners, and the economically disadvantaged. This chapter also found evidence of the perception of the public library as a social place with especially positive connotations associated with educational roles. Finally, the public library was also considered as an institution that may help people to learn about themselves and their communities, particularly via the work of the Local Studies Services.

This research suggests that the above mentioned groups have not all been equally considered by the respondents. Children and young people are distinctively perceived by Portuguese librarians and elected members as facing special barriers and deserving particular attention and care. Furthermore there are indications that actual, consistent work is being done in this field in public libraries across the country. It is apparent from the data that other sectors of the communities, such as lifelong learners, the elderly, the handicapped and prisoners, while not being ignored, have localised attention and are generally lower in the priorities of the respondents. This having been said, it should be stressed that the educational needs of these users were recognised by some respondents, as well as the barriers they may face in meeting them. However, the responses suggest that either they are difficult to reach and attract to the library (as adults with literacy problems), or that these are the roles of other institutions (such as IT literacy), or simply that the library does not have the resources to reach all these potential users.

The perceptions of the respondents may be influenced by a variety of factors, as discussed in the following sections.

### **8.5.1. Socio-economic level of the communities**

Many examples were found in the responses to the present study, and in the literature, indicating that the public library may be more relevant for communities facing higher levels of hardship, for example, lower levels of income, higher unemployment rates or isolation. Low socio-economic levels are normally associated with low educational attainment and this underpins the need for an institution such as the public library, which provides free access to materials and information, as well as a friendly environment and support from staff.

The acknowledgement of this situation in many parts of Portugal may influence the perceptions of librarians and elected members, who face daily requirements from poor people, many of them children. Some flagrant examples of poverty emerged from the data, with the public library acting sometimes well beyond the scope of its ordinary work. One public library in Portugal supplying food to poor children is matched by demands by the homeless for shower facilities in the public library of Seattle (Seattle Central Library, 2000).

### **8.5.2. Facilities available in the communities**

Another factor that might have influenced the perceptions of the respondents was the recognition of a distinct lack of educational support in the communities, in the school and at home. The need for the public library support is more apparent when children do not have a place or books to study at home, do not have parents to help them at home, or simply do not have a home. It is also reinforced when, as is the case in Portugal, school libraries were considered as nearly non-existent and teachers might not always be able to give them support in matters such as information and study skills.

Public librarians and elected members in Portugal, working in this socio-economic environment, aware of the needs of the communities, do however face a set of constraints that are likely to influence their opinions about the social roles of public libraries in a different direction. Some of these constraints have already been mentioned in earlier chapters, and are here highlighted in those aspects more closely associated with the social roles.

### **8.5.3. Shortage of resources**

This chapter found evidence, both in the literature and in the interviews, of a wide set of resources necessary for the library to have a significant impact as far as the social roles are concerned. For example, it is necessary to have enough trained librarians for housebound services, mobile libraries, school libraries services, prisons, and many others. Sufficient and adequate books and materials are essential to serve a wide diversity of users, such as the visually impaired, and,

obviously, space is necessary to house materials, provide services and attend to users, and none of this is possible without financial resources.

Previous chapters have already highlighted the scarcity of resources in Portuguese public libraries, according not only to the opinion of the respondents but also clearly evidenced in the literature. Comparing details of the data with the literature, a wide gap very obviously emerges between, for instance, what the support of libraries is to prisoners or to hospitals in Portugal and in the United Kingdom. Portuguese librarians and elected members are thus caught in the middle of these two opposite forces: the often-clear evidence of the requirements made to the library service comes into conflict with a sheer lack of resources.

ICT may be considered separately due to its growing relevance and its especial social implications. It has been generally acknowledged that access to computers and digital information in public libraries could lessen social divides, and, moreover, users, especially children, actually do require that access. However many concerns were raised by respondents about the actual possibility of public libraries being able to play a significant role in this process due, above all, to the poor provision of ICT in Portuguese public libraries. Other factors may affect these perceptions, such as the ever-present shortage of IT skilled staff, or a general consideration of the library as an institution associated with books and book lending.

#### **8.5.4. Lack of theory and guidelines**

The literature review of the present research found a wealth of research reports, books, papers and government reports dealing with the social roles of public libraries, both in the United Kingdom and at international level. The lack of writings originating from Portugal and dealing with the Portuguese reality is striking. Neither the Portuguese Library Association nor the Portuguese Institute for Books and Libraries have issued any guidelines addressing these issues, except for those concerned with the architecture of libraries.

This feeble theoretical ground has potentially damaging effects on the management of library services and especially on the possibility of the public library playing

significant and socially visible social roles, and may impact on the perceptions of librarians and elected members.

#### **8.5.6. Non traditional roles**

The literature (Linley & Usherwood, 1998) in the field of the social impact of public libraries agrees that the established roles of public libraries are in the fields of education and literacy, culture and information, and considers the social roles as non-traditional. It has been suggested in chapter 6 that the reluctance of librarians in assuming non-traditional roles and a poor public perception of the library role may have an effect on their perceptions of the role of public libraries in lifelong learning. This framework may also be used to discuss their perceptions of the social roles.

Librarians normally tend to detach themselves from activities that may be somehow associated with teaching and tutoring, and to a lesser degree with counselling and advising. This trend leads to a perception that may hinder the playing of more positive roles in many aspects of the library work that are fundamental in social terms, such as support to curriculum, to the development of IT skills, or homework centres.

The public general perception of the public library as an institution associated with books and reading, and often confined to the library building, may also hide those roles that are not considered as traditional and well established.

The public library system in Portugal is recent when compared to other countries. It is still establishing itself as a force in terms of education, culture and information. The characteristics that have attracted most media and public opinion attention are the fact that they are lively places, open to children and young people, and promoting books and reading. The respondents to this study were, however, able to identify some aspects of the social impact of the library, and gave examples of actual work being carried out in this field. This fact provides an indication of the potential available in Portugal to expand the scope of activity and the reach of the work of public libraries in social terms.

## 8.6. Summary

This chapter discussed the perceptions of Portuguese librarians and elected members on how public libraries may help especially vulnerable members of the communities to overcome barriers to education. It also addressed the relevance of the public library as a social and educational place, and its roles in helping people to learn about themselves and their communities.

This research suggests that children in general may face barriers to education, as they are often deprived of many social rights attributed to adults. These barriers may be further aggravated by special circumstances that affect many of them, such as poverty, illness, distance, insecurity, or cultural background. The views of the respondents to the present study suggest that public libraries may play a crucial role in helping children to overcome some of the barriers to their educational development.

The same kinds of difficulties may affect adult learners, who may also be affected by psychological barriers, family commitments, basic literacy problems, lack of time, finance, and entry requirements. Public library support of adult literacy and of open and lifelong learning was considered by the respondents as a way of overcoming these barriers. However some factors were found that may hinder the possibilities of the public library playing these roles, such as limited conceptions of lifelong learning amongst the respondents, lack of resources of the public library, and difficulties in reaching adults with literacy problems.

Some especially vulnerable sectors of the community were considered to face special barriers to education. These include the elderly, the handicapped, prisoners, and, generally, the economically disadvantaged. This research suggests that the public library may play a crucial role in helping to meet the educational needs of these users. The reasons for this include: their services are free in principle, removing at least some financial barriers, they have specialised staff prepared to provide guidance and support, they are conveniently located and have extended opening hours. However, in Portugal, not all these sectors are equally considered and need to be developed.

Public libraries were considered to play a relevant social role due to their use as a meeting place, especially by children, youngsters and older adults. This research



suggests that the use of the library as a meeting space also has an educational and cultural significance.

The library helps the elderly to overcome isolation by physically being used as a meeting and socialising place and by lending books, which is also considered as a way of fighting loneliness. Mobile libraries are still scarce in Portugal, but many respondents acknowledged their relevance. Their numbers are growing, and they were considered as an important way of helping both children and adults to overcome isolation.

The public library also provides a convivial environment for study much used by students for group work or simply because they prefer to study with friends. Examples were also found both in the interviews and in the literature, of children and youngsters just using the library to meet and socialize, without making use of any other resources. The cultural activities organised by public libraries were also found to be an excellent opportunity to meet and socialize. The literature provides evidence of the relevance of the library as a space for the meeting of different cultures and traditions.

In a period of demographic mobility and economical and cultural globalisation, the public library is considered a vital institution in the preservation of local identity and culture. It acts as the guardian of unique local historical documentation much used by local researchers, students and ordinary people interested in learning about their roots and community life. The activities of the Local Studies collections provide learning opportunities, may help in the preservation of oral tradition, and contribute to promoting local image and identity. The public library was found to be often a motif of pride and an element contributing to the self-esteem of the communities. Furthermore, by acting in collaboration with local institutions and community groups, the public library supports their activities and promotes local writers and artists.

This research suggests that in Portugal there are particular conditions that may make the support given to education especially relevant, such as the low socio-economic level of many communities and the lack of other educational support in the communities. However, other circumstances may act in a different direction and hinder the support public libraries are able to give, such as the shortage of resources, the lack of theory and guidelines, and the reluctance of librarians to assume non-traditional roles.

## Chapter 9

# MANAGERIAL ISSUES

*I think that the library should have more autonomy. I think we librarians have much to do. Mainly we have to demonstrate the important role we may play. And it has to be acknowledged that we have the capacity and the willingness to develop this work and to make this project a reality. I think that if the librarians have the capacity to show that will power, that enthusiasm, that initiative, everything else will come with it...*

(Librarian, small town, Central region of the country)

### 9.1. Introduction

This chapter discusses the perceptions of Portuguese librarians and elected members on the extent to which some managerial aspects may influence the fulfilment of the educational roles of public libraries. Whilst some of these issues affect the whole of the public library service, the discussion will concentrate on the impact they may have on the fulfilment of educational roles.

One set of factors has been identified that may help or hamper the library to deliver an efficient service in support of education. These factors are: resources (including human resources), buildings and equipment, ICT, books and materials and finance; organisational culture and autonomy; marketing and promotion; co-operation and networking, and legislation.

Throughout this report, it has been suggested that respondents perceive a distinct lack of several kinds of resources. This chapter provides evidence of the extent to which this situation impends on the public library service and prevents it from playing a more significant role in education.

The positive aspects mentioned by the respondents were: generally high quality and well located buildings; a motivated and growing number of staff; a permanent set of

promotion activities, and a good and collaborative relationship of public libraries with the community and schools.

However some factors emerge from this research that may, if not properly addressed, jeopardise many of the efforts made in recent years: the number of staff is clearly insufficient and they require urgent skills updating; the levels of finance and ICT are generally considered as low; the organisational structures in which the libraries operate are dominated by centralisation and bureaucracy; low levels of co-operation between public libraries, and an absence of national legislation on libraries.

Some of these problems are causing serious difficulties preventing the full exploitation of the potential of Portuguese public libraries in education. It is also suggested that once elected members and professionals become fully conscious of these issues, they will be in a privileged position to tackle them and take full advantage and build on the positive aspects identified by this research.

## 9.2. Resources

The main changes that have been taking place in Portuguese public libraries are a great increase in the number of municipalities building new libraries and an increase in the number of books and materials available as well as in the number of staff working in public libraries.

However, this picture has to be seen in the context of a country where public libraries were almost non-existent, where the public library services were outdated and very far from meeting the minimum standards of organisations such as IFLA. So, although there is clear and distinctive growth, most resources and the quality of the services remain generally low, a situation which is well documented by the Millennium Study (LibEcon 2000.).

The data from the present study confirm that the perceptions of the respondents, mainly librarians but also many elected members, reflect the situation portrayed in the "Millennium Study" and generally provide evidence regarding the lack of

resources of many Portuguese public libraries. The next sections of this chapter will discuss these perceptions on the implications for education of the management of human resources, buildings, ICT, books and materials, and finance.

### 9.2.1. Human resources

A distinct characteristic emerging from this study is the perception of a general shortage of staff in Portuguese public libraries. Indeed, this issue has emerged in most of the previous chapters, and has been considered as a major constraint on public libraries, hampering their possibilities of playing an effective role in supporting education. The following opinion is just one among many underpinning this idea:

*I think that the great majority of the public libraries are struggling with a great shortage of human resources. Most of the libraries I know have great difficulties as far as personnel are concerned. Most of them have one librarian, or at the best two. There are a few with three or four but those are exceptions. So there is a great shortage of staff both at upper and intermediate levels. Some libraries are working with a minimum number of staff and they are not able to deliver the service*

(Librarian, medium size town, Central region of the country)

One of the requirements of the Portuguese Institute for Books and Libraries (IPLB) to support the establishment of new libraries is the existence of a number of staff corresponding to the size of the municipalities (See Chapter 2, Table 1). Some respondents considered that these numbers are both insufficient and difficult to meet.

The respondents identified several reasons for this shortage of staff. Financial constraints were perhaps the most relevant. However, these constraints may affect public libraries diversely, depending on factors such as the political visibility of the library, or the size of the municipality. Most respondents also identified a distinct shortage of staff in the labour market. The following response illustrates several aspects of this issue. It acknowledges the relative newness of the public library in the Municipality and the impact this may have on the allocation of resources. Besides it suggests that the finance of the library is after all a political decision influenced by the relative importance attributed to the library service.

*The library is an emerging factor in municipal life. The library has been working for only four years now. And we have been learning, we have been detecting some deficiencies. As far as the staff is concerned, we have to find some sense of equilibrium. We have a quota in our budget for "current expenses", which are for staff, expenses with petrol, post, telephones, etc. We only have a small margin to work with. It is the Law of Local Finances that establishes how far we may go.*

(Councillor, small town, Central region of the country)

Moura (1996), while considering that as a rule the Municipalities are fulfilling their obligations as far as staff is concerned, in terms of the contract with the Ministry of Culture, acknowledged that these requirements were insufficient.

The data obtained by the LibEcon study indicate a distinct growth in the number of staff working in Portuguese public libraries. However, this is due mainly to the growing number of libraries open to the public and does not generally mean a better ratio of staff per head of population in each individual library.

The shortage of staff, in the opinion of respondents, has important implications affecting educational roles. This may be the cause of poor planning and management, delays in technical work and partial closures. Especially critical to the support of education may be poor opening hours and poor support to learners, as suggested by the following response:

*I don't think it would be easy. For that purpose [support to open learning], the library would require more specialised staff in diverse areas, able to give support in a project like that.*

(Librarian, small town, Central region of the country)

Public libraries in Portugal have found ways of trying to relieve staff shortages by having temporary projects with different ministries, such as the Ministry of Education, the Ministry of Employment or the Ministry of Youth. Whilst this strategy may momentarily alleviate the pressures caused by staff shortages, it has been recognised that this may bring other problems. Bringing in people who may lack the necessary skills, and who in any case do not have appropriate library training was considered as a temporary solution.

*We would need more people, as we sometimes have to close some of the sections because we do not have enough staff. That is why we have resorted*



*to protocols with the Ministry of Education, for example to have here a nurse, or to the Institute of Youth. But these are makeshift solutions. Very often they do not have the proper training or education to be here.*

(Librarian, medium size town, Central region of the country)

The respondents to this study expressed a variety of opinions about the skills of the staff working in public libraries. Elected members were generally very pleased with the quality of the employees. However, their answers suggest an administrative vision of the issue, meaning that the Municipality employs people with the legally required qualifications. Whether they had the necessary skills or not did not appear to raise much concern amongst elected members.

*Yes, we have people with the proper qualifications. The librarian has passed the course of documentary sciences, and we also have two library assistants with legal qualifications.*

(Councillor, small town, Central region of the country)

Amongst librarians, however, the skills of the staff raised a mixture of responses with the tendency to identify areas where the skills necessary to cope with work demands, especially in fields associated with support to education, were considered insufficient:

*We do not have staff at an intermediate level able to grasp the project of the library. This would require technical and cultural skills that paraprofessionals do not have. They may be able to do cataloguing, but that is no longer enough especially in a public library. It is necessary to do reading advising and those who do not read cannot advise; we need well-informed people, and if they do not read the paper or watch the news they do know what is going on in the world around them.*

(Librarian, medium size town, South of the country)

These kinds of perceptions were confirmed by the literature. Silva (2000) stressed the need for significant investments in education and training of present and future librarians. This author warns

*“if there is not investment in the human resources of the libraries, then we will not take advantage of the financial investments made in the name of joining the information society.” (page 23)*

The proportion of professional and paraprofessional staff was another issue raised in the interviews, which finds correspondence in the literature. The ratio of qualified librarians in relation to paraprofessionals and auxiliary staff was considered very low, and the comparison of the numbers of the Portuguese with the IFLA guidelines provides eloquent confirmation of this. Silva (2000) goes even further and proposes that this ratio should be 50% or more qualified librarians, “similarly to what may be observed in the majority of companies of services where knowledge as a determinant role” (page 25). This may have great impact on the quality of support to education.

It is generally acknowledged that at least some aspects of lifelong learning require strong levels of support, advice and guidance, as well as specific information. Hence staff related issues have been frequently raised and discussed in the literature. Nunes & Levy (2000) suggested that the support to lifelong learning results in added responsibilities for public librarians, an idea confirmed by Silva (2000), who suggested that librarians should be able:

“to search the Internet (...) to evaluate the quality and reliability of their findings, to teach both the staff and the users to search the Internet and how to make the best use of its immense potential in terms of free and paid training, of free and paid computer programmes that allow significant improvements in people’s activities” (page 22-23).

The skills of public librarians required to support lifelong learning were widely addressed at European level by studies such as PLAIL, ODIN, and PLIS. Along with technological expertise, all these studies highlighted the relatively new roles of librarians as educators, very closely associated with the educational roles of the libraries in the fields of information literacy and knowledge production.

Research recently concluded in the United Kingdom (Usherwood, et. al., 2001) has demonstrated just how important training, especially in ICT, may be for the retention of quality staff in public libraries, and for the delivery of innovative and quality services. The development of ICT expertise was also crucial in the training programmes proposed by Moura (1996) which are otherwise limited and do not consider other skills such as those associated with the support to education.

Technical skills are essential but if public libraries are to play their educational roles, then librarians must also develop as educators.

The present research suggests that Portuguese librarians and elected members consider that public libraries in Portugal may see its future developments constrained by a dramatic shortage of staff. This may be crucial to the possibility of the libraries fulfilling their educational roles. The need of the country investing in the education of new librarians and in updating the skills of the existing ones is very apparent, both in the interviews and in the literature.

### 9.2.2. Buildings: location and quality

The good architectural design of the new Portuguese public libraries was generally acknowledged by the respondents. Furthermore, these buildings as a rule were considered to have a good location, as illustrated by the following statement:

*The library has an optimum location, here just in the Historical Centre... and that is one of the reasons of our success. Kids come very easily, they do not have to make any effort to come to the library.*

*(Librarian, medium size town, North of the country)*

The location of the library is distinctly and carefully considered in the Portuguese guidelines, indicating the relevance attributed to this issue at a strategic level (PORTUGAL. IPLB, 2000: 4). Location is important not only for easy access of the users (Kerslake & Kinnell, 1998; Linley & Usherwood, 1998) but also because of its social significance. Greenhalgh & Worpole (1995: 157) suggest that “the location and siting of public libraries is central to a credible model of provision”, and the responses of Portuguese librarians and elected members show how critical this may be for the social perception of the library and ultimately for its success or failure.

Special attention to the quality of the construction emerges from many responses, underlying the relevance of providing the community with a quality public space. This care was illustrated by the next response:

*You may see how the space was worked, either outside the library or the garden. It is demonstrative of the interest we place in the concept of the library as a social and leisure space. We tried to make it attractive because in an attractive space people feel good. A special care was taken with the*

*materials in order to match the old manor house.*

(Councillor, medium size town, North of the country)

A national newspaper reported on the inauguration of a new library in Portugal (Marques, 2001), and the impressions of the journalist about the library were:

*"The new building (...) is noticeable by luminosity. Natural light invades all the recesses, announcing an environment of unwinding and the pleasure of reading."*

This is one of many reports written in the Portuguese press praising the quality of the buildings of the new public libraries. This news report echoes the title of one of the chapters of the book of Greenhalgh & Worpole (1995): "The era of light and glass". They argue that "glass and transparency reveal the universal and democratic ideas bound up in the idea of a public library" (page 60).

Whilst the previous aspects (associated with location, quality of design and construction materials) appear to have been carefully thought through, the respondents to the present study, especially the librarians, indicate that more functional considerations have not been properly taken into account in the building of some new libraries in Portugal. Many respondents considered that the relatively small size of the libraries had major implications on the library service, specifically affecting educational roles. It was suggested that:

*We would need other physical conditions that we do not have here. These educational roles we have been talking about may not evolve because we just do not have the physical conditions.*

(Librarian, small town, Central region of the country)

Adding to the problem of size, the adequacy of the building characteristics for the functions of a public library was often questioned, as illustrated in the following response:

*More than the amount of space I think that the problem is the way it was conceived. The area might be enough, but I think that we have unnecessary problems due to bad planning.*

(Librarian, medium size town, North of the country)

The Portuguese programme for public libraries was strongly inspired by the French programme of “Mediathèques” (Gascuel, 1984), as far as the design of the library and general management of the network are concerned. However, a comparison between the Portuguese and French programmes results in an obvious discrepancy in the size of the libraries, which, for the same population, are much smaller in Portugal than in France. The same conclusion would be reached by comparing the Portuguese programme with the IFLA guidelines (IFLA 2000).

It could then be said that the perceptions of the respondents to the present study, concerning the size of the libraries, are accurate and match the results of these exercises. The implications of this fact impend heavily on the public libraries and diminish their capabilities to fulfil their educational roles. It may impact negatively on the normal functioning of the library, as users tend to invade areas that in principle would be assigned to other functions. This is the case, for example, when children use the adult sections, causing disruption among adults. The design of the library may also impact on staff management, since the use of several separate rooms demands the assistance of more members of staff.

Considering the fact that public libraries in Portugal are being built anew, as well as the existence of IPLB as a co-ordinating body of the Public Libraries Network, it may be surprising that the kind of problems discussed above are affecting many of the libraries. The data obtained for this research suggest some circumstances that may help to explain why this is the case.

One of these circumstances is the fact that public libraries are a new subject for public opinion and for many people involved, including some important decision-makers, such as elected members. One of them expressed his previous views concerning the size of the public library in his town and how these views were changing in face of the experience he was having.

*For the time being, this space is enough. Bear in mind that we are talking about a library that opened only seven or eight years ago. I was not a councillor then, but as a citizen I then found that a white elephant, a monster, was being built. Because there was no tradition of using libraries in [...] But it is not. It worked well, very well, it has very good usage, and as I see things going, it will have even more utilisation (...) It is apparent that soon it will*



*become small, also because the library has been growing in the number of books it keeps...*

(Councillor, medium size town, North of the country)

Many of the libraries in the Public Libraries Network result from the adaptation and refurbishment of ancient buildings. This may cause some problems and impose serious constraints on the architectural design of the new premises. The fact that IPLB is financing these works has been invaluable for the development of public libraries, but may also have some downsides, as exemplified in the following response:

*When the Municipal Council decided on the refurbishment of that building, our purpose was mainly to obtain some financing from central government and to recover a decaying building. That building was previously a Court House and it was meant to become a House of Culture... it was the use of an old space but it was not very clear then what its new use would be. Initially it was thought that besides the library it would include a museum and the tourism office. When the works started we had to make many alterations to the initial project, and then I understood that the space would be scarcely enough just for the public library. I confess that I was not very aware of the functions of the public library, but I was quickly convinced of the great educational role the library might have. The works went on, with some inexperience of the architect and of the people that accompanied them, as then we did not have a librarian.*

(Councillor, medium size town, North of the country)

This response illustrates the lack of political awareness of library roles and is also an example of the consequences of the lack of professional librarians. Gascuel (1984) advocated a team to delineate and accompany the building of the library made up of three elements: the librarian, the architect and the political representative. The Ministry of Culture requires that the project should have from the outset the contribution of a librarian (PORTUGAL. IPLB, 2000), but it appears that this is not always met by the Municipalities.

The present study suggests that several factors associated with the building where the library is installed may affect the capacities of the public libraries to fulfill their educational roles. These factors include location, size and quality of the buildings, covering aesthetic and functional considerations. The role of a professional librarian

in delineating the building was also stressed both in the interviews and in the literature. Too little consideration of some of these aspects may seriously damage the quality of the buildings and ultimately the quality of the services the library will be able to provide, namely in supporting education.

### 9.2.3. ICT

The responses to the present research indicate a very uneven situation in Portuguese public libraries, as far as ICT is concerned. The following statements are testimony to the differences that may be found.

*We still don't have an automated catalogue. That is very constraining, since our card catalogues - we are still producing them because I find it important - are only by authors and titles. (...) Beyond the problem of the catalogue, we don't have access to the Internet, we don't have computers for the users - very often they are in demand in order to be able to do some work, but we don't have them.*

(Librarian, small town, South of the country)

*We are talking, for instance in the present phase of RILP, as is our case, with catalogues on the Internet, a CD-ROM network also available on the Internet. As long as we have a technological infrastructure able to guarantee the efficient functioning of those systems, I think we will be able to care for our readers, or users, since that means that they may no longer need to enter the library door. They may have remote access. And so we will have to be able to meet those needs. And they are new users. And they will make educational demands. It is possible to have a course on CD-ROM and use it from outside the library.*

(Librarian, medium sized town, Central region of the country)

Several authors (Patrao, 1999; Figueiredo & Calixto, 1998) confirmed this unevenness, and the relatively low use of computers in Portuguese public libraries, when compared to other countries in the European Union (Larsen, 1997).

However, the respondents generally showed a distinct perception of the importance of ICT for public libraries in general, and for the support to education in particular. While they showed some dismay caused by the actual provision, their feelings were marked by hope for future developments in this field.

As was indicated above, the consequences of a poor technological basis were suggested in several responses which mentioned the lack of a catalogue and poor access of users to digital information. The following response suggests how this may have a negative impact on the support to education:

*We are very short of technological resources. Some of the facets we have been talking about, such as the support given to computer skills, or lifelong learning, or information technology, we have not been able to work in these fields, but I hope many things will change when we open the new library.*

(Librarian, Medium size town, Central region of the country)

Information and Communication Technology has been changing the face of public libraries worldwide, especially during the last decade, strongly enlarging the possibilities of their support to education (Silva, 2000; Nunes & Levy, 2000). This has been demonstrated at a European level in the PLIS study (Larsen, 1997), that suggests different levels of technological development across Europe and within particular countries.

In the United Kingdom, the report *Reading the Future* (Great Britain, Department of National Heritage, 1997: 10) highlighted the opportunities brought about by IT but suggests a vision of the future rather than a testimony of provision at the time. The whole idea of the People's Network is based on the provision of access to education via the public library, using network technology and digital contents (Great Britain, Department for Education and Employment, 1998).

Building on two case studies in Britain and Australia, Poustie (1999) focused on the new roles of public libraries in supporting the development of skills for the use of ICT and networks. One of the conclusions of this report (Poustie, 1999: 32) is that:

*"Now is the time, given the new technologies available, for public libraries to develop strategic partnerships that will enable them to maintain and enhance their role as education and training agencies in the provision of support skills in the use of technology that will enable more adults and young adults to take advantage of the networks that will enable them to access the hardware and software that is part of the growing network of learning in all countries."*

Public libraries in Portugal are going through the early stages of introducing computers, even for basic housekeeping functions. Moura (1996: 8) confirmed that

“the use of computers in library management is as yet limited, and the access to information networks is a rarity”. The data also suggest different levels of development, and while some libraries do not yet have an automated catalogue, there are, on the other hand, examples of web sites with catalogues available on the Internet. Patrão (1999) provided an overview of these different stages, confirming the above mentioned idea of disparities in the same country (Larsen, 1999).

This may be explained by the fact that the first report that instigated the new public libraries programme (Moura, 1986) considered ICT only marginally, and the first libraries to be built under this framework did not originally have any technology. This may be better understood considering that the real development of ICT in public libraries in many other countries only took place in the 1990's. The present guidelines (PORTUGAL. IPLB, 2000) fully acknowledge the importance of ICT which is presently a requirement for the support of IPLB to the new libraries. These Guidelines consider the use of technology not only “for the automation of the traditional functions” but also for “accessing the Internet, community information, open and distance learning.” (page 13).

These developments suggest that the expectations of the respondents to the present study on future developments of ICT are grounded in a realistic context in which a policy has been defined and financing is being allocated. It is thus reasonable to expect positive developments in the near future and an increasing use of ICT to support public libraries in their educational roles.

#### 9.2.4. Books and materials

The respondents to this study generally considered that books and materials were sufficient and matched current demands, as illustrated in the following responses:

*It has been sufficient for what has been required. Obviously we are always buying, always updating the stock. But up to the present moment it has been enough. We have around twenty thousand books, a great number of reviews, and it is meeting the needs, although obviously it is good that we are always growing.*

(Librarian, small town, South of the country)

However a minority of the respondents considered that:

*The documentation is never enough. We are never happy with what we have. It was pleasant that in the first two years we invested sixteen or seventeen million Escudos [50 to 53 thousand pounds] in books and audio-visual materials. After that the acquisitions have not been as speedy and good as we would like, because the Municipalities have some difficulties and we have to have a financial equilibrium. So, the documentation that we presently have, although perhaps enough is not optimum.*

(Councillor, small town, Central region of the country)

These data are somehow surprising and do not match other evidence available. A report published by the Ministry of Culture (Moura, 1996), analysing quantitative data from 1994, concluded that Portuguese public libraries held only between 50% to 60% of the total amount of the documentation agreed in the contracts with the Ministry of Culture. This picture is further aggravated by the fact that, as acknowledged in the same report, the standards of these contracts were already below the IFLA recommendations of two books per inhabitant. Other studies, such as those by Figueiredo & Calixto (1998) and LibEcon (2000), confirm this situation.

Further research would be necessary to clarify the discrepancies between the data of the present study and other evidence available. For the time being, some suggestions might be advanced, recognising however that the ground for them is not very safe. One indication might be found in some responses that suggested that the respondents' perceptions were based on the actual demand of present users and do not consider potential users:

*I think that we meet more or less the needs of our present users.*

(Librarian, small town, South of the country)

*I think that ours is a rich library, considering the comments of those that use it. However, I believe it is always possible to have more.*

(Councillor, medium size town, North of the country)

It could be suggested that if the number of library members was low, then the supply of books might seem enough, even if it was below accepted standards. Added to this, one of the responses provided quantitative data, and according to this, the ratio of books per capita was indeed within the parameters recommended by IFLA. This



may mean that some libraries do have a good supply of materials whilst others do not, suggesting then the same kind of unevenness throughout the country similar to that of ICT, as previously mentioned. This is not unlikely, since the standards required by IPLB, and the respective financing, only apply to the initial collection due to be in place when the library is inaugurated. After that, each Municipality is fully in charge of the library, and while some continue to develop the collections others may not.

The respondents to the present study generally attributed little importance to audio-visual materials and audio-visual sections especially when discussing lifelong learning. Public libraries, although they have audio-visual sections find it hard to acquire materials for learning, although it may be argued that both films and music may also have an educational dimension. Audio-visual materials have not yet found a place in Portuguese public libraries equal to that pertaining to books and other print materials. Few exceptions were found to a scenario in which these sections, although in heavy demand, are struggling due to a shortage in materials and in staff.

*The audio-visual section is now a little better with some movies, but is still very poor. It is perhaps the most negative point in our library.*

(Librarian, small town, South of the country)

This research suggests that the provision of books and materials in Portuguese public libraries is satisfactory for present demands, and thus would allow for the fulfilment of, at least, a part of the libraries' educational roles. This may, however, be hindered by some problems, such as less consideration for audio-visual materials, poor provision of ICT, or the lack of resources for open and distance learning, as discussed in chapter 7.

#### 9.2.4. Finance

This study found a set of mixed feelings in Portuguese librarians and elected members about the adequacy of the levels of investment in public libraries and their impact on the delivery of services to education. The responses considering the level of investment as very low were found mainly amongst librarians, while elected members appeared to have a different vision of the issue.

*The main difficulties are financial. For instance I spoke earlier about buying software. We do not have it yet because there is not enough money. This is the main reason. The main limitation for me is the lack of money.*

(Librarian, small town, South of the country)

However, a great number of respondents, even considering that investment may be low for necessities, tend to have an understanding of the issue, acknowledging that investment in the library has to be balanced within the general expenditure of the municipality.

*There are financial constraints placed upon the local authorities because we have been asked to fulfil many roles [by the Central Government] and obviously constraints come up and I feel those constraints are obstacles to the development of the library.*

(Councillor, small town, South of the country)

The general situation of poor basic infrastructure in the country was taken in consideration by some respondents, thus justifying the constraints faced by the library services with the need to establish priorities and the urgency of investing in other fields.

*It is an economic issue. I do not think it is a political issue, because I think that the President is sensitive, I really think he is. But we have to manage the resources available. And since we still have a high percentage of the population without tap water, without basic sanitation, the library or education are, sadly, considered as luxury.*

(Councillor, medium size town, North of the country)

Another set of responses acknowledged an increase in the level of expenditure of the municipalities in cultural activities, including libraries.

*If we made a study of the financial resources attributed in all the municipalities to cultural activities and education, including the public library, we would find that along the years they have been growing in percentage and in comparison to other sectors of the budget.*

(Councillor, small town, Central region of the country)

One of the benchmarks of The LibEcon study (LibEcon, 2000) was the level of total expenditure of public library services per capita. Three categories were considered, and Portugal is included in the "low spenders" (countries with total expenditure per 1,000 head of population below □ 10,000) at a great distance from the next ranking

category. The perceptions of the respondents considering financing as a problem are thus confirmed by this report.

Some reasons were advanced for the low level of financing in some public libraries. One of them is the lack of pressure of public opinion, as exemplified in the following response:

*I think that the problem of the libraries not being properly financed... people also do not feel the needs and thus do not demand. If the population of [...], within two years, demanded other equipment, more information, more and better staff, then I believe that the Council would have to listen...*

(Librarian, small town, South of the country)

This response suggests that a higher level of social awareness of the roles of public libraries might increase the financing of the library. Moura (1996: 8) is very critical about the way this financing is considered by politicians, suggesting that “the costs of the library are not seen as an investment but, almost always, simply as expenditure that should be reduced to a minimum”. The existence of legislation on public libraries was also considered by some respondents as a way of preventing or minimising the financial difficulties of public libraries. This will be discussed later in this chapter.

The hypothesis of the library diversifying its sources of financing was considered by most of the respondents as a vague possibility, unlikely to make much difference in the general picture of financial constraints.

*In the case of open learning, or even the support to literacy, if the library offered conditions, perhaps we could have support from the Ministry of Education, support in specialised staff...*

(Librarian, small town, Central region of the country)

Several possibilities for obtaining financing apart from the municipal budget were mentioned, such as support from the private sector, from several Ministries, such as Education, Technology and Employment, or from the European Union. However, it clearly emerged from the responses that a distinct lack of tradition in this field, a lack of an entrepreneurial spirit, and a passive attitude towards innovative forms of

financing, prevent public libraries from exploiting other opportunities that, it is felt by many, do indeed exist.

Charging for some library services is one way other countries have found to add to the library budget and overcome financial constraints, an issue that has raised much discussion. In the Portuguese situation, obtaining finance this way is not acceptable, and as indicated in chapter 8, nearly all the services are free to the users, except photocopies and, in some cases, access to the Internet. But even in this case, many advocate the idea of free access, as voiced by one of the respondents:

*Should access to the Internet be paid for? I have been thinking about this – and access is still very expensive – and I think that if we divide the costs of the equipment, or the utilisation of the equipment by the population, the cost per head would be minimal. Therefore, the library must consider all these circumstances in its budget. When we invest in computers we are after all investing in a product just as we do with books. Only the media is different. There were times when charges were made on book lending, and we came to the conclusion that the public library is a space where those things are free. We should not have an economist vision of these things...*

(Librarian, medium size town, South of the country)

This idea echoes Usherwood's remarks (1989:55), which suggested:

*"The question now, as in the past, is how these costs should be provided for. Are they to be passed on to the individual user in the form of direct charges or are they to be found through public funds?"*

The answer to this question will depend on a wide number of factors, but serious consideration of the social and democratic roles of the public library, especially for poorer communities, would make it seem quite obvious. Furthermore if the country is developing public libraries against a background of low educational and reading levels, charging for public library service would appear contradictory. As Usherwood (1996: 87) demonstrated, fees, if anything, bring down the use of public libraries, not the opposite.

Adequate financing of public libraries does not in itself guarantee high standards of service and the satisfaction of the users' educational needs. However, Linley & Usherwood (1999:74) found in their study that "financial issues were observed to affect all aspects of the library service". If the level of financing is not sufficient, then

the library is very unlikely to have the necessary equipment, materials and staff to meet the users educational needs. And, as has been discussed in previous sections of this chapter, the perceptions of the respondents generally agree with the fact that the resources (except for documentation) are insufficient.

### 9.3. Organisational culture and autonomy

The respondents to the present study considered the lack of autonomy as a major issue affecting the management of public libraries and impacting on their development as educational institutions. While librarians tend to be more sensitive to this issue, some elected members agree on the negative consequences it may have.

Several levels of autonomy and indeed several levels of restrictions were considered by the respondents. Administrative and financial autonomy seem to be the most critical issues, while a certain latitude appears to exist in programming activities and in more technically related work. These differences were exemplified in the following response.

*As far as the cultural activity is concerned I have autonomy. We program the activities, we make the contacts, and we make the activities. I have autonomy to make the animation programme, and to publicise it. (...) But I do not have financial autonomy, which would be very important for me. I would like to have a budget and to control financial management. We make reports and explain our needs, and so on. But ultimately I do not have the power to decide.*

(Librarian, small town, Central region of the country)

Librarians, as a rule, were very critical about this issue, and felt that there is a too strong interference by elected members in domains of the work that they feel is their own. Moreover some librarians feel that elected members' perceptions of the library are deficient, as illustrated by the following response:

*I think that the librarian would need more freedom to move things, and manage in another way, without being completely subservient to political power. Librarians find it difficult to try new ways, because those holding political power have difficulties in understanding what a library is really about*



*(...) We would need to move into a greater autonomy of librarians in relation to political power.*

(Librarian, small town, Central region of the country)

Many librarians considered themselves excluded from the processes of decision making. They saw their role as restricted to making proposals and trying to convince the real decision-makers of their rightness. Furthermore, they considered that decision making was influenced by factors outside their sphere, such as the political relevance attributed to the library by elected members, which was often considered as low.

*I make a proposal which may or may not be accepted depending on many things: on the budget of the Municipality, on the interest that the political power has on the project, how it is seen... A librarian does not have the power to decide. He only has the possibility of presenting proposals and has the possibility of trying to convince those who are going to decide, and he can do everything he can for it to be accepted. But he does not have the power to decide.*

(Librarian, small town, Central region of the country)

Individual styles of management and the political perceptions of the value of the library were seen as influencing the relationship between elected members and the library. This echoes a finding of Linley & Usherwood (1998: 76): "Some members of staff felt the elected members were not sufficiently aware of the value of library resources".

However, other factors external to the elected members appear to influence the levels of autonomy of librarians. Some administrative procedures and a bureaucratic culture across the municipality were considered to be amongst these factors. The following response illustrates this issue:

*At an administrative level it may be very complicated. For instance when it comes to purchasing documents it becomes very heavy for the library. There have to be bids for the acquisition of books and other documents, and this is not the same thing as buying screws or nails. And a solution for this is not within sight...*

(Librarian, small town, Central region of the country)

Some respondents acknowledged that the origin of the problems facing the libraries and associated with lack of autonomy may be beyond local circumstances, and indeed beyond the elected members' styles and attitudes.

*Some of these situations are associated with the law governing the municipalities. For instance this problem of the photocopies or the acquisitions of documentation, I understand that this has nothing to do with this Municipality, it is an issue at national level.*

(Librarian, medium size town, North of the country)

Whilst the concordance with a lack of autonomy of the library was much more generalised amongst librarians, some elected members also agreed with this idea. One said:

*I remember that during the last elections one political party asked to visit the premises of the library in order to be better acquainted with what goes on in here. That request went up to the President of the Municipality for a decision. So it may be concluded that the library lacks autonomy.*

(Councillor, medium size town, Central region of the country)

Elected members, however, whilst considering bureaucracy as a constraint on the activities of the library, tended to justify the need for centralisation with the need for observing legal procedures:

*Bureaucracy is a constraint. We have to follow certain procedures... The simple subscription of a review has to be authorised by the Municipality. The organisation [the library] cannot authorise spending, because that is the competency of a member of the executive, even if he does not read it, his signature is required, even if the amount is very little.*

(Councillor, small town, South of the country)

The different perceptions of librarians and elected members about this and indeed other issues may be at least partially explained by domain theory (Kouzes & Mico, 1979). These authors propose the consideration of three domains to analyse organisational behaviour in human service organizations: the policy domain, the management domain and the service domain. Although these domains are not absolutely separate, individuals acting in each one of them develop different perceptions according to each one's experiences.

The lack of autonomy was associated by some with the lack of confidence in people and their capacities:

*I think more trust is necessary, the library should be more autonomous to manage its activities than it is now.*

(Librarian, small town, Central region of the country)

Centralisation was viewed as having a visible negative impact on the morale of the staff. The following response comes from a librarian visibly disturbed and upset by the barriers to an efficient and speedy processing of the library service.

*I think that as for management we should be more independent. Because we depend on the elected member for almost everything. It may sound like a caricature, but if we want to buy a ballpen we need the authorisation of the President. If we want to buy a book costing as little as 2,500 Escudos [approximately £8.00] I have to ask the president. I have to make an internal request. I think more autonomy is necessary for the people who manage these services. After all, I do the management of what?*

(Librarian, small town, South of the country)

Another respondent said:

*Our visions are opposite, and we are always on the receiving end... I am not at all happy when somebody comes and has to go away without a book because we do not have it. This is demoralising...*

(Librarian, small town, Central region of the country)

Echoes of this librarian's feelings may be found in McKee's suggestion that "centralized management processes and bureaucratic systems do not encourage the conditions which help to nurture an individual's sense of achievement" (1989: 112).

Librarians acting in this bureaucratic and centralised environment often feel that their possibilities for introducing significant alterations are limited by the prevailing structures of power and by the legislation. However, some responses suggested that there is a potential to change the situation, as long as librarians are able to demonstrate their professional capacities and their willingness to play a different role, and by affirming the relevance of the library service to the communities. The following statement illustrates this idea:

*I think that the library should have more autonomy. I think we librarians have much to do. Mainly we have to demonstrate the important role we may play. And it has to be acknowledged that we have the capacity and the willingness to develop this work and to make this project a reality. I think that if the librarians have the capacity to show that will power, that enthusiasm, that initiative, everything else will come with it...*

(Librarian, small town, Central region of the country)

Another solution to the problem of lack of autonomy was suggested by some respondents, comparing the library with examples of other existing services in some municipalities that have already acquired a special autonomous status, which, many think, alleviates much of the bureaucratic pressure. This has already been achieved with the Municipal Services, in charge of water supply and sanitation.

The data of this research suggest a predominant perception among librarians and elected members that high levels of centralism and bureaucracy pervade the management and the organisational culture of public libraries in Portugal. Some of the reasons for this state of affairs may be found both in the existing legislation governing the public sector and in authoritarian and centralised styles of management.

A study carried out by Comedia (1993) approached this issue under a British perspective, and concluded:

"The library is a classic and rather old-fashioned public sector institution, hierarchical and until recently lacking the autonomy to undertake entrepreneurial initiatives. This study must inevitably raise the question of the organisational status of the library and whether being tightly enclosed within the local authority structures is the best way of maximising its potential." (page 62)

This quotation could be almost fully applied to the situation of the Portuguese public libraries, except, as suggested by the respondents in the present study, for consideration of the fact as having been taking place "until recently".

McKee (1989: 203) discussed a set of concepts that may help libraries (and indeed many other organisations) to become "high performance units, looking outward and forward", including autonomy, encompassing the following characteristics:

"decentralization, minimum bureaucracy, a positive attitude towards risk-

taking, and an environment in which managers are encouraged to exercise initiative (within a clear framework of permissive activity)."

The picture emerging from the present research has some contrasting nuances, concerning the levels of autonomy in Portuguese public libraries. These organisations are unlikely to be able to meet many of their goals in the present bureaucratic environment that pervades most of the public sector, as they all suffer the weight of the existing legislation, codes, procedures and management styles in which they evolve (Ochôa & Pinto, 2000). And overall it is very clear that this is a major threat impending on the possibilities of Portuguese public libraries developing support to education further.

However, some seeds of change and possible ways out of this situation have emerged from the data collected in this study. These are the constant reaffirmation of the professional values of librarians and of the value of the library service for the communities, as well as the search for innovative approaches and frameworks for the management of the library. Another positive note may be added, considering the changes, albeit slow, resulting from government initiatives in quality management in the public sector (Ochôa & Pinto, 2000).

#### **9.4. Marketing and promotion**

Throughout this study, much evidence of the great importance that public libraries in Portugal ascribe to "animation" activities was presented. They have been discussed in the context of the educational roles of support to literacy, to lifelong learning and to educational institutions. These activities may take a wide variety of shapes, including guided tours of the library, meetings with authors, conferences, storytelling and so on. Adding to this, public libraries also use publicity and public relations techniques to make themselves known. All these activities are generally termed in the literature (De Sáez, 1993) as marketing and promotion.

Schools obviously deserve special attention in the efforts for promotion of Portuguese public libraries, matching the special relationship with educational institutions discussed in previous chapters.



*This library is well known in our town. All the public and private schools, including the nursery schools, receive our leaflets every month. And we have activities specially made to captivate young people.*

(Librarian, medium size town, Central region of the country)

Whilst many of these promotional activities follow the traditional techniques of publicity and public relations, some innovative approaches were also identified. One example of this was the collaboration with the local bakers, who publicised the library on their bread paper bags. Exhibitions and displays produced by the library may also take place in the bakery or in pubs.

*I think the promotion made by our library is interesting, because it makes it in formal ways, such as leaflets, posters, brochures sent to schools, and so on. It also makes exhibitions. And there is co-operation with the bakeries, "bread with books". The paper bags have excerpts of books, and small exhibitions are made in the baker's shops. Imagination is very important.*

(Councillor, medium size town, North of the country)

*The library promotes itself well with exhibitions and conferences with varied people that come to the library, writers, other librarians, museum curators. These activities are targeted at schools and local associations.*

(Councillor, medium size town, North of the country)

*This is the kind of promotion we have to do. And also guided tours for groups, such as the elderly, homes for elderly people, and schools.*

(Councillor, medium size town, North of the country)

The respondents generally agreed on the importance and the need to promote the library service, both internally, within the municipality targeting the decision-makers, and externally in the wider community. Whether the promotion actually being carried out was enough and efficient, did not obtain the same consensus amongst the respondents. There is evidence from the data suggesting some reasons for these difficulties. These include financial constraints, lack of autonomy and reliance on the public relation departments of the municipalities, and the poor marketing skills of librarians.

Some distinct traits characterise the perceptions of the respondents to the present study in relation to marketing and promotion of the public library. One is the importance attributed to the issue of promotion, indicating an outward looking

attitude, which considers the importance of the library communicating with the communities, making itself visible and well known. This is especially visible as far as promotion targeted at schools is concerned. On the other hand, the respondents generally tended to consider marketing and promotion as the same thing, denoting a limited conception of marketing.

This confusion is far from being exclusive to the respondents in the present study, as it is a common mix up especially amongst managers of nonprofit organisations (Kotler & Andreasen, 1991; Kinnell & MacDougall, 1994). The Aslib review (1995:271) found that “many library staff see marketing as primarily advertising rather than as a total marketing approach...”.

Whilst marketing encompasses a set of managerial activities, including studying the existing needs of the public, adapting the products to these needs, communicating their existence to a wider audience and evaluating the process, promotion is but a stage of this cycle (De Sáez, 1993; Kotler & Andreasen, 1991).

Focusing on the marketing of children's services Kinnell (1996a) summarised the advantages of a marketing approach for library management, suggesting that this

“can produce considerable benefits to libraries. Moreover, a critical and analytical use of marketing principles enables library managers to plan a coherent service which is seen as part of a wider whole”

In spite of all these reasons, public libraries have not as a rule paid much consideration to the use of a marketing approach to management. Many have relied on the idea of the library “as a good thing” with no need to be justified or accounted for. The Aslib review (1995:271) found that:

“Librarians believe passionately that the services they provide are inherently desirable – they find it hard to believe anyone would turn them down once they know they are available.”

The Comedia report (1993: 71) draws attention to “the self-effacing nature of librarians” and suggests that “this essentially passive approach is inappropriate for marketing and branding what the library of the future is about.”

This attitude may explain some difficulties public librarians have in embracing a marketing philosophy, but does not appear to fully apply to the Portuguese reality. Librarians answering the present study demonstrated a distinct adherence to the idea of an outward and communicative library, even if this was not included in a fully fledged marketing strategy, and the problems identified lay elsewhere. A marketing strategy obviously needs human and financial resources that, as suggested earlier, are poor in Portuguese public libraries. Furthermore, the library is not isolated, and depends much on the marketing approaches prevalent in the municipalities and, ultimately, on the decisions taken by elected members. As suggested by Kinnell & MacDougall (1994: 39): "Effective organizational structures and sufficient resourcing to implement marketing are both dependent on a positive attitude by members and senior managers"

## 9.5. Co-operation and networking

The Manifesto approved by Portuguese public librarians (A leitura pública em Portugal, 1983) could hardly be gloomier about the kinds of relationship between public libraries and their communities, when it considered that libraries were "a set of dead institutions, without any relationship amongst them or with the communities."

The respondents to the present study provided abundant testimonies of how this situation has changed since the 1980's, and the need for the public library to establish close relationships with other institutions was present in many responses. Previous chapters have already discussed the relationships of public libraries with institutions involved in formal education, as well as with other community institutions that may have an educational relevance, such as prisons and cultural associations. This section will discuss the perceptions of the respondents concerning the managerial implications of these relationships as well as the relations of the public library with the educational departments of the Municipalities.

The importance of collaboration for public libraries was stressed by Comedia (1993:76):

"Libraries need partners for several reasons. First as a means of tapping in

additional resources in an era of shrinking public sector financing (...). Second as a means of sharing risk, especially on more innovative projects that might not fall into the mainstream of what the library does, and third, as a way of learning from others.”

The present research suggests that this list may be enlarged by other reasons especially applicable to the Portuguese context. Collaboration may provide a means for the library to enlarge the number of its users, to making better use of its resources, and to improve its image both in the community and in other departments of the local authority.

### 9.5.1. Schools

Chapter seven has already discussed in detail the relationship between public libraries and schools. The perceptions of the respondents indicated a distinct connection between these institutions. As suggested schools were considered the privileged partners of public libraries. However some local differences were found and the experiences were variable.

A councillor of an opposition party, and member of the directing board of a secondary school said:

*Co-operation with all the schools. I think that the library is exemplary in this aspect. No school may ever say that the library did not want to be partner in any activity.*

(Councillor, medium size town, North of the country)

Generally, the perceptions of the respondents were that co-operation between public libraries and schools worked very well with good results for both parties involved.

*I think we have had a very good understanding with the schools, and I find this is fundamental to develop this work. There is a very good understanding with the teachers who make the best of the library to develop their work with the pupils.*

(Librarian, small town, Central region of the country)

However some responses suggest that co-operation was not a clearly defined concept, and in some cases it appears that what is in place is the normal functioning

of the library with its promotional activities targeted at schools, as illustrated by the following response.

*It does not work well, it works at a minimum level, which are the animation activities. Indeed it is not really co-operation. We do things and they come and attend. And even so, it may be difficult to mobilise them.*

(Librarian, small town, South of the country)

The quality and efficiency of these partnerships were also questioned by some respondents, who emphasised the variations between different schools and attributed these to the different attitudes of teachers towards the library.

*It depends. With some schools it works very well. With other schools things are more difficult and we have to insist (...). It depends much on the people. Some people do a wonderful job, are always available. With other people it is very difficult. They have another rhythm, they have other concerns, it has also to do with the importance they attribute to this co-operation.*

(Librarian, medium size town, North of the country)

It is apparent that co-operation is more successful between the public library and primary schools, while some difficulties were identified in relation to secondary schools and higher education.

*We have a good relationship mainly with primary teachers. With secondary schools things may be a bit more complicated.*

(Librarian, small town, South of the country)

The reasons for this fact appear to be twofold. On the one hand, librarians perceive that primary teachers are more interested and ready to collaborate with the public library. On the other hand, the libraries themselves appear to pay more attention to this sector, as it is formally linked with the local authority, while other levels of education are primarily the responsibility of central government. One librarian said:

*We work mainly with primary schools, because they are dependent on the Municipality, and so we give more importance to the work we do with them.*

(Librarian, medium size town, Central region of the country)

Other responses highlight networking with the educational providers and the relevant educational institutions in the community.



*Libraries must work in close co-operation with the local co-ordination of recurrent education, which according to our legal framework has more responsibility, more formal responsibility, because in lifelong learning there is a set of frameworks that are informal, they depend on each person individually.*

(Councillor, small town, South of the country)

The literature on the relationships of public libraries and schools has already been revised in Chapter 7, under 3 main headings: support to the curriculum, support to school libraries and homework centers.

The managerial aspects of this relationship may be summarised as follows:

The collaboration with schools influences all aspects the management of public libraries, including design and space (PORTUGAL. IPLB, 2000), acquisition of materials (Blanshard, 1997), financing, (Elkin, 1996a), staff (Train, et. al., 2000), activities (Figueiredo & Calixto, 1998; Denham, 2000a), and marketing (Denham, 2000a). This collaboration has generally positive outcomes both for the schools and for the libraries (Denham, 2000; Train, et. al., 2000).

### 9.5.2. Educational Departments of the municipalities

The views of the respondents on the collaboration of the library with the educational department of the municipalities were quite diverse. The responses ranged from considering the relations as perfect to considering them non-existent. This may suggest variation in local circumstances but other factors may be at the root of these discrepancies, as will be discussed below. The two following responses provide views about this issue which are at the two extremes of the range of responses obtained:

*The relation is good because the education service is in tune with the library.*

(Librarian, medium size town, South of the country)

*I feel that we would need to co-ordinate policies and actions much more than we do now. What presently exists is nearly isolated work with little relation between each other.*

(Librarian, medium size town, Central region of the country)

Some of the reasons for the difficulties of the public library and the educational services co-operating with each other emerge from the data. One, very apparent, was the perception of the weakness of the education services. Mainly councillors seemed to be aware of this situation. In some extreme cases the notion of “education services” was hard to understand by some respondents, librarians and councillors alike. The following situation in which the councillor was the only person working in the educational field was not an isolated case:

*This Municipality is very small and our workforce is very limited. We do not have education services exactly. They are concentrated, albeit without any centralising perspective, in the Councillor who is in charge of education, which is myself.*

(Councillor, small town, Central region of the country)

This situation, however, is not exclusive of small municipalities and other cases were found of very poor education services, either run exclusively by the councillor or with a limited number of junior staff.

The limited purpose of the education services was another issue, which emerged from the data with the possibility of hindering the relationships between these departments. Some respondents considered that the education department had mainly administrative and bureaucratic functions, which made it difficult to find common ground with the library, which was apparently more inclined to the actual provision of services to the public. One councillor described the main activities of the education services as follows:

*On the other hand, the education services, which are also my responsibility, are more concerned with bureaucratic and administrative aspects than anything else. Our problems in terms of education are sorting out school transportation, social support to poor pupils, and a paraphernalia of other administrative things that leave practically no time for anything else.*

(Councillor, medium size town, Central region of the country)

Nevertheless, some cases also were found of opinions considering that one reason for these difficulties of collaborating lie primarily in the library service, due to its newness and lack of resources. This has led to the unawareness of the educational relevance of the library in the educational department of the municipality.

*The library, with all its objectives, everything we want to attain has not yet found its place... I think that the role of the library is fundamental in a community, but other departments in the Municipality have not yet understood this.*

(Librarian, small town, South of the country)

The data suggest that support to school libraries has been strengthening collaboration between public library and the education services, as exemplified in the following responses:

*I can tell you the relationship is very good because the education officers have collaborated very much with us in supporting school libraries. They accompany us when we go to the schools, and give us suggestions (...). Whenever we need them they are ready to collaborate with us and obviously we with them.*

(Librarian, medium size town, North of the country)

This response may indicate that the collaboration in specific projects, with clear purposes, could help strengthen the ties between these two departments and eventually beyond them.

The relationship of the library with other departments of the local authority was discussed by Linley & Usherwood (1998), who suggest that a vertical structure makes collaborative work more difficult. Their study found that problems of communication between departments originated in mutual unawareness and could hamper the efficiency of all of them. The review conducted by Aslib (1995), while recognising that public libraries have worked closely with other municipal services, including education, also concluded that:

*"Our research indicates that on this issue public libraries are undervalued not by their users but by the politicians and senior managers with local authorities who have created structures which deny the library service the opportunity of performing to its potential."*

The same kind of difficulties were found by the research of the University of Central England on children's libraries and reading (Denham, 2000). This is probably one of the reasons why libraries tend to work directly with schools rather than involving the educational departments (Train et. al., 2000). As Denham (2000: 49) suggests:

*"Many authorities identified their strategy as one of working either directly*

with schools or through the aegis of the schools library service, rather than directly approaching the education department and convincing staff there of the worth of libraries”.

Problems of collaboration between public libraries and the education departments in local authorities are not exclusive to Portugal, as was suggested by Denham (2000). The present research suggests that many reasons may make this difficult. Amongst them are the weaknesses of one or both departments, lack of co-ordination and communication within the local authority, and lack of experience in common projects. Added to this some local circumstances, such as personal relationships between managers and members of staff of both departments, appear to influence the possibilities of a successful partnership. However the experiences provided by those libraries where collaboration does work, suggest that, for a number of reasons, both departments and the public will benefit from effective collaborative work.

### 9.5.3. Other institutions

The data from this research identified a wide set of institutions that, although not having a predominantly educational purpose, were nevertheless identified by many respondents as being partners of the library in playing educational roles. These institutions include, amongst others, several kinds of associations, trade unions, parishes, prisons, hospitals, homes for elderly people, as well as private enterprises. The following responses provide some examples of this:

*We co-operate with some associations, helping them to mount exhibitions, for example we recently had a festival of cartoons. We publicise their initiatives together with our programmes, so that they save on mail fees. We do this when things have quality and have something to do with our work.*

(Librarian, medium size town, North of the country)

The literature identifies a set of privileged partners of public libraries. Dempsey (1998) indicates amongst others museums, galleries and archives, alongside with numerous suppliers of content for the Internet, such as the BBC, Disney, and other private companies. Network creation, including the various organisers of further

education programmes and public libraries, was one key aspect of the project reported by Ornholdt (1999).

The general perception of the respondents to the present study was that the co-operation with these institutions works well. Even when some problems were identified, they were considered to be minor ones, and did not jeopardise the overall good results obtained through this working together. The following response is an example of the assessment made by many librarians, including both the positive and the negative aspects:

*I think it works very well indeed. Of course there are always those small problems, it seems sometimes that those most interested are those who work the least. The associations may come to organise a colloquium and most of the work falls on us and they turn up at the last minute. But these are minor problems that I guess may happen everywhere. In spite of this I think the co-operation is optimum.*

(Librarian, medium size town, North of the country)

Some authors have identified difficulties and problems in co-operation. Williamson, & Wallis (1998) for example found cases of library authorities complaining that they do not get co-operation from job centres on information provision.

The need for co-operation and networking is apparent in the responses to the present study, and several different dimensions emerge from them. One relates to the business and professional world, and is concerned with the need to identify educational and training needs. This is exemplified by the following responses.

*I think it is very important that the support to self-study is carried out by listening to society, the unions, and the professional groups.*

(Librarian, medium sized town, North of the country)

Lifelong learning, due to its intrinsic characteristics, is a role of public libraries that, if it is to be fulfilled, requires high levels of networking and the establishment of partnerships with other libraries, with training and educational organisations, and with the private sector. This need has been increasingly recognised in research and government reports. Smith (1987) stressed the importance of collaboration due to financial constraints and gave examples of how public libraries have found new ways of financing due to the establishment of partnerships.



The use of educational libraries by the general public and the use of public libraries by enrolled students have led to a necessity of co-ordination between diverse kinds of libraries, as identified by some authors (Smith, 1987; Unwin, Stephens, & Bolton, 1998; Ornholt, 1999). Nankivell (1998) suggests that this cross-use is already taking place.

The literature suggests that co-operation and networking became increasingly important alongside the development of information technology in libraries. An example of this is EARL, The Consortium for Public Library Networking (Woodhouse, 1998), providing a wide set of services to public libraries users, many of which may be considered as contributing to lifelong learning. Poustie (1999) gives detailed examples of strategic partnerships for lifelong learning of libraries and other organisations in Scotland and Australia.

The very idea of the public library as a "People's Network", as well as its inclusion in the National Grid for Learning and in the University for Industry, suggest just how crucial networking is for public libraries if they are to fulfil their educational goals.

The comparison of the responses to the present study with the literature indicates an agreement of the respondents with the idea of establishing networks and partnerships for lifelong learning. However it should be noted that the responses fall short of detailing crucial aspects of this co-operation, indeed they mean a general and vague agreement with the idea and not a detailed awareness of the complex implications found in the literature.

A very striking aspect regarding collaboration emerges from this research: according to the data, public libraries in Portugal, whilst having established some strong links with several organisations in the community, have not yet developed collaboration structures amongst themselves. Apart from one brief reference to a collaborative project between three local authorities aimed at reading promotion, no reference was found in the present research to prolonged and structured partnerships of public libraries. These findings echo the case study on Portugal, integrated in the PLIS study (Ochôa, 1997).

The discussion of the reasons for this situation and the effects it may have in the performance of public libraries is beyond the scope of this study. However, taking into account experiences from other countries found in the literature, there is reason to suggest that lack of interlibrary co-operation may have very serious consequences and severely diminish the possibilities of the public libraries in Portugal to play a significant role in supporting education. This situation is particularly relevant as far as lifelong learning is concerned, an area in which the links with other organisations are clearly weaker in Portugal.

## 9.6. Legislation

The fact that Portugal does not have a library law was often mentioned by librarians as a hindering factor to the library being able to play their educational roles, and indeed affecting many aspects of the work of the library.

Some responses stressed the relevance that a law could have in helping libraries to gain more autonomy:

*We are expected to do many things but we are not given the corresponding autonomy. This is an aspect that should be carefully looked at by librarians, and we should have legislation for the libraries.*

(Librarian, small town, South of the country)

Another reason to justify the need for library legislation was the possible conflict of the roles of librarians and of elected members:

*Libraries suffer from lack of autonomy. A Library Charter must be urgently defined; otherwise it may be very dangerous for us librarians, as we will be seen as competing with the elected members.*

(Librarian, medium size town, North of the country)

The financing of the library was another issue considered by some respondents as likely to benefit from legislation, as illustrated in the following responses:

*I think it would be important, for example, as far as the financing is concerned, that some national parameters existed, because, otherwise, we risk that some municipalities being penalised in favour of others with less sensitivity to cultural matters.*

(Councillor, medium size town, North of the country)

One response raised a set of diverse issues that justify the need for legislation for public libraries. Alongside the benefits associated with autonomy and financing, it considered that legislation could help to ease the administrative procedures by underlying the specificity of the library within the organization of the municipality. Another major issue was censorship of library materials by elected members, which, according to the respondent, a library law would make more difficult.

*A different statute should be defined for the library. Presently it is considered just as any other service of the local authority. Or maybe specific rules should be defined within the local administration for the reality which is the library, even within the administrative constraints that we have mentioned. It should be defined clearly how bids should be considered, how acquisitions should be considered, how the autonomy of the management of the library should be considered, independently of some political pressures. I mean the role of the library, as a library, should be understood, for instance within the guidelines of the UNESCO Manifesto that cannot cope with specific political orientations. It happens, sadly, I believe it happens in some libraries, that they may be used by political powers to convey a certain way of seeing things and just a specific way of seeing things. I remember having heard some colleagues say that it was absolutely impossible for them to have in the library works that were not in favour of a certain political allegiance. A public library cannot be compatible with these things. This has nothing to do with what a public library should be. It is even hard for me to believe in such things, as I, myself, have never felt something like this but this is what I was told... and it is possible because, depending on the political power, it may intervene... All the entities that intervene at a cultural level, and are associated with political power, are vulnerable entities. I think that a specific statute should be established for libraries, I do not know what other solutions exist except for a library law.*

(Librarian, medium size town, South of the country)

It should be underlined that this was the only response which raised the problems of censorship in Portuguese public libraries, suggesting thus that this is not a major issue in Portuguese public libraries. However, this is a topic that would need clarification and demands further research, since there is evidence of the importance of this issue in other parts of the world (Curry, 1997).

The literature provides arguments to substantiate the respondent's perceptions about the usefulness of having legislation to serve as a framework for public libraries. Both the UNESCO Manifesto (UNESCO, 1995) and the new IFLA

Guidelines (IFLA 2000) are clear in their acknowledgement of the positive outcomes of library legislation. While the Manifesto states that the public library “must be supported by specific legislation...”, the guidelines suggest that this legislation “assures their continuance and their place in the government structure.” According to Thomas (1997) several reasons may recommend the existence of legislation. These include preventing charges, guaranteeing a certain standard or avoiding cuts to activities and setting the conditions for state support.

Different legislative and administrative traditions in different countries may lead to different approaches to library legislation. Legislation, in itself, is not a secure panacea to solve all the problems of public libraries. Besides the evolving of society may make obsolete any piece of legislation within a few years of publication (Vittiello, 2000). However, the perceptions of the respondents to the present study result from their own experiences of working and living in a library universe that, literally, is outside the law. Their hopes for what library legislation could bring about match in many cases the positive outcomes achieved in other parts of the world.

This study suggests that the existence of legislation in Portugal could help public libraries in fulfilling their potential of supporting education. It could add to a clarification of their educational roles, it could help in guaranteeing that they are given the necessary resources in a coherent and continuous way, and it would allow a clarification of their management structures and processes.

## **9.7. Summary**

This chapter discussed the perceptions of librarians and elected members on the managerial issues affecting the educational roles of public libraries in Portugal. Five main areas are discussed, constituting a separate section within the chapter: resources, autonomy, marketing and promotion, co-operation and networking, and legislation.

An adequate level of resources was, not surprisingly, considered to be crucial for the public libraries to play a significant role in education. The quantity and quality of

these resources were discussed in comparison with international documents and research carried out in diverse parts of the world, mainly in the United Kingdom. A dramatic shortage of staff was considered as one of the greatest constraints hampering the educational roles of public libraries in Portugal. This may lead to poor planning and management, delays in technical work, shorter opening hours, partial closures of services and poor support to the users. The remedies that have been tried for this situation have led to the use of unqualified staff, but appear to be unsatisfactory. This perception of staff shortage is further aggravated by the perceptions of the adequacy of the skills to support education. While some respondents, predominantly elected members, showed satisfaction with the performance of staff, many librarians identified deficiencies in ICT skills and in the cultural level of paraprofessionals and other staff. Overall, high degrees of satisfaction were found with personal qualities such as commitment and team spirit. This research suggests the need for investment in the quality of staff, considering the developments and the influence of ICT, and the need to increase learning support. Furthermore, a considerable shift is necessary in the attitude of librarians, which presently show reluctance to assume their roles as educators.

The location and quality of the buildings where libraries have been installed was considered as having a strong influence on many aspects of the library service, including supporting education. As a rule the respondents considered the location of the library buildings, and the construction work as positive aspects, associated with the social image of the library and its consideration as a distinguished public space. However many problems were identified concerning the size of the buildings and their functionality, with important negative impacts on the educational roles. They were generally considered as presenting functional and management problems.

The findings of this research point to a relatively low level of the use of ICT in Portuguese public libraries and an unevenness of this use in different libraries, in spite of a general acceptance by the respondents of the relevance of ICT for education and generally for the public library. This situation causes difficulties in information management (absence of catalogue), and poor access to digital



information and to networks, namely the Internet. However, a generally optimistic feeling was found with hope for future developments in this field.

Most respondents generally considered the provision of books and materials sufficient with only a minority considering the existence of poor collections. These perceptions do not match the findings of the other studies and international benchmarks. These discrepancies may be explained by the feeble reading habits in the country and local variations.

This research suggests, and the literature confirms, a generalised perception of a low level of financing resources attributed to public libraries in Portugal. Generally it was felt that low social and political perceptions of the roles of the libraries are at the root of these financial difficulties. However, charging for services does not appear as a way for Portuguese public libraries to increase their revenues, and the consideration of alternative sources of financing does not seem to be really taken seriously by librarians and elected members alike.

A major issue affecting the educational roles of the public libraries is the lack of autonomy of the public library within the structure of the local authority. Librarians were more sensitive to the problem, but some elected members also shared this view. Elected members tended to consider the existing legislation on public administration as one of the reasons for this situation, but many librarians emphasised the prevalence of a centralised and bureaucratic culture across local administration as the main reason for the lack of autonomy of the library. This situation may have strong negative impacts on library educational roles, slowing down and lowering the quality of decisions and lowering the morale of the staff. Some government initiatives on quality management and the feeling of some librarians that the profession should and could affirm its professional values were positive notes counteracting this situation.

Promotion was considered very important for the educational roles and as a way of affirming generally new libraries in their communities and within the local authorities. This was considered a way of counteracting some problems associated with the lack of awareness of library roles, and improving the situation concerning financing,

political sensitivity, autonomy and staff. Portuguese librarians and elected members have a limited vision of marketing, not uncommon in other parts of the world.

Librarians and elected members in Portugal share a common and strong belief in the relevance of the collaboration of public libraries with other institutions, especially with schools. The perceptions of the positive outcomes of this collaboration are generalised with only a minority of problems attributed generally to different approaches of teachers to the work with the library.

The relationship of the public library with the education departments of the local authorities appears to vary much across the country and perceptions are quite diverse. When difficulties were found, these could be attributed to several factors: weaknesses either in the education department or in the library, or in both, emerging as an obstacle to a permanent and fruitful collaboration. Several responses highlighted the fact that the education departments were small and under resourced, in some cases non-existent, and had mainly administrative and logistic functions. Some good results obtained from this collaboration were found in the work associated with school libraries, suggesting thus that specific projects may help to increase the levels and results of the collaboration between departments.

The last section of this chapter addressed the relevance of legislation to the public library and its impact on library support to education. Many respondents considered that the fact that Portugal does not have a library law may hamper the development of public libraries as it makes them more vulnerable and subject to a set of contingencies. Many respondents believe that a law would help libraries to gain more autonomy, assure their financing, ease administrative procedures and prevent censorship.

The picture emerging from the present research suggests a set of worrying questions about the management of public libraries in Portugal and the impact this may have on the fulfilment of their educational roles. Some have argued in Portugal that local authorities tend to think of the library mainly as a building and only secondarily as a service. Surely the findings of this research add some arguments to this discussion.

## Chapter 10

# CONCLUSIONS AND RECOMMENDATIONS

*The present research concluded that Portuguese librarians and elected members view the public library as an educational institution. However it is obvious, especially in comparing their perceptions with other models, such as the one proposed by Brophy (Brophy, Allred & Allred, 1996), that theirs is vision that is constrained by a number of factors. Amongst these are individual and local factors, which include a limited social and political perception of the libraries' roles, the absence of an underlying philosophy on the roles of libraries in education, the managerial and legal context, and the socio-economic context.*

### 10.1 Introduction

The aim of this study was to develop knowledge on how Portuguese public libraries may contribute to the educational development of individuals and of communities. It focused in obtaining the views of elected members and librarians on the educational roles of public libraries.

At a time when this work is coming to a conclusion, it seems reasonable to claim that the aim of the research has been successfully achieved. The methodology and research tools proposed were developed and exploited as intended. A model of the public library services and activities with educational impact on individuals and communities was developed. The perceptions of Portuguese librarians and elected members were analysed in relation to the specific educational situation and to the present stage of development of public libraries in this country. The reasons why Portuguese librarians and elected members have developed their particular views on the educational roles of public libraries were examined. Finally, a number of measures that may be taken to help public libraries in Portugal to play a more meaningful role in supporting education are suggested in this chapter.

After discussing the general background in which the study took place the final chapter of this study presents and debates its main findings, concluding with a set of recommendations, including recommendations for further research.

The model of the public library emerging from the views of Portuguese librarians and elected members is distinctly one of an educational library, one that supports people of all ages and diverse backgrounds. However several differences are highlighted, suggesting that a set of constraints may pose some threats to the public library fulfilling its potential in the educational field.

Some of these constraints are socio-economic and legal, whilst others are individual or local. Amongst these are the professional background and education of respondents as well as partial views on the roles of librarians and of teachers.

## **10.2. The background**

The scene of Portuguese public libraries may be characterised by important changes following a very poor level of service provision. These changes began in the 1980's with the launching by the Government of a national programme for the establishment of a network of public libraries, in accordance with internationally accepted professional standards. The starting level was then recognised as being very low, and the few existing libraries were characterised by conservatism, a low level of facilities and services, and isolation from the community.

During the last 20 years, nearly 100 libraries have been inaugurated, and around 120 are under construction, in a universe of 278 municipalities. Overall, this means a distinct growth in the expenditure on public libraries, in the number of books and other materials available across the country, and in the number of staff employed. Naturally, this growth has not been without difficulties and constraints, as found by this study and documented in other research carried out in Portugal and at European level.

These changes are occurring in a country with economic, social and educational levels amongst the lowest in the European Union. This fact has two contradictory

implications: on one hand it makes the work of public libraries all the more relevant in fighting illiteracy, in promoting social equity, in supporting economic development, and in raising the educational levels of individuals and communities. On the other hand it also means that in spite of these efforts, resources are limited and libraries have to compete for them with other institutions, and other needs are sometimes felt as more important.

The changes in Portuguese public libraries are occurring in the context of international changes in the fields of public libraries and education. Libraries in general are operating in an increasingly technological environment that has raised mixed feelings amongst professionals and other stakeholders. Whatever the case, ICT is definitely changing many aspects of library work and patterns of service delivery, enlarging its scope and demanding new skills from professionals. The political and social climate has increased the pressure on public services, including the libraries, by imposing expenditure cuts and increasing the need for accountability.

It is in these contexts, both national and international, that Portuguese librarians and elected members are operating, simultaneously influenced by this changing environment and acting on it. Their perceptions of the educational roles of libraries are all the more relevant, considering that many decisions based on them are being and will be taken, and these decisions are crucial in shaping the Portuguese public libraries of the future.

### **10.3. The educational roles**

This study identified the perceptions of Portuguese librarians and elected members on a wide variety of educational roles played by public libraries. For methodological reasons and for the sake of clarity, these roles were organized and presented in different chapters, but in practice these roles are interwoven and mutually influence each other.



The respondents to this study considered that public libraries play relevant roles in the fields of literacy and lifelong learning, and in supporting formal education. Furthermore, the data suggest that the fulfilment of these roles is viewed by the respondents as having a wide set of social outcomes.

The concept of literacy used by the respondents suggests a wide conception of the subject, encompassing several dimensions. This was considered beyond the traditional abilities of reading and writing and included the capacities of making sense and effective use of those skills in daily life. Furthermore the respondents acknowledged the existence of new media, originating conceptions of what has been called "the new literacies", for example those associated with the media and computers.

The roles of public libraries in supporting literacy raised diverse kinds of responses, depending on the aspects of literacy considered and on the kinds of activities involved.

Children's literacy was considered by most respondents as a key role of the public library, matching the findings of most literature. The library was considered as being in a privileged position to help children in fostering the pleasure of reading, developing the imagination and the love of books (Lonsdale: 2000), learning cultural values, developing a critical mind and acquiring a sense of citizenship (Greenhalgh & Worpole, 1995). The belief in the importance of starting to read and using libraries from an early age underpins most of the responses and has been suggested in many studies (Eyre, 1996).

The roles of Portuguese libraries in the promotion of adult literacy was also acknowledged, but arguments were voiced which suggested that it might be difficult for the library to reach adults illiterates or those with low levels of literacy. The educational profession has largely ignored the potential of public libraries in literacy (Cole, 2000), but there is evidence to suggest that libraries in diverse parts of the world have had a very positive role in helping adults to improve the levels of literacy (Bramley, 1991; Smith, 1984; Cole, 2000). There are no reasons to believe that this could not also be the case in Portugal, if the issue was considered and properly

addressed. The need to fight adult illiteracy, especially recurrent functional illiteracy, is very apparent, due to high levels of illiteracy in the country (Benavente, 1996), and public libraries might play a relevant role in this field.

The public library was only marginally considered as a place to enhance information literacy. This was viewed mainly as the responsibility of the schools, where, contradictorily, these skills were generally considered as very low amongst students and to a certain degree amongst teachers. The literature suggests diverse perspectives about this issue. Some studies (Great Britain, Department of National Heritage, 1995) echo the respondents of the present research, acknowledging only a complementary role for the public library. However, research found that librarians in the United Kingdom considered that they had a central role to play in supporting information skills (Lonsdale, 2000). Information literacy is becoming increasingly important in the context of educational changes that focused on the learner's autonomy and lifelong learning (American Library Association, 1993), and there is evidence suggesting that the role of the public library in this field is becoming increasingly relevant.

Computer literacy was also considered by most elected members and some librarians as primarily a role of other institutions, with the public library playing only a supportive and complementary role. This may be associated with a traditional vision of the public library and the low levels of computerisation of public libraries in Portugal. Whilst similar perceptions were found in the literature and in the public perception of the library in other countries such as the United States (Benton Foundation, 1996), other studies advocate a trend for the development of the public library as a place to learn computer skills (Thorhauge, 1997)

Two conceptions of lifelong learning emerged from this research: deliberate or purposeful and unintentional (Galbraith, 1995). The evidence suggests that the latter was predominant in the respondents' opinions about the support of the public library to lifelong learning. They generally ignored relevant aspects of current practice in other European countries (Brophy, Allred & Allred, 1996), namely those associated with purposeful learning. This conclusion is based on several indicators: the

emphasis placed upon “animation” activities, a narrow notion of information provision for education, the absence of counselling and support among the functions associated with lifelong learning, and the kinds of resources that are considered as important for lifelong learning.

The educational field has either largely ignored the potential of public libraries in lifelong learning (Williamson & Wallis, 1998) or considered it in a limited way associating it exclusively with purposeful learning and formal education (Batt, 1998a). The library literature, on the other hand, has asserted the potential of public libraries in this field (Van Fleet, 1990; Greenhalgh & Worpole, 1995; Craven, 2000), but often only considered the partial view of purposeful learning (Brophy, Allred & Allred, 1996).

Public libraries have been considered as the privileged partners of schools (Denham, 2000) and the data from this study suggest that Portuguese librarians and elected members share this vision. They considered the support of public libraries for the curriculum and the promotion of reading amongst students as one of the key roles for public libraries (Greenhalgh & Worpole, 1995). This was considered to be particularly relevant in Portugal due to demographic, social and economic factors. This support takes a wide variety of forms, including the organisation of animation activities (Figueiredo & Calixto, 1998; Denham, 2000), the provision of a wide variety of books to foster reading for pleasure (Lonsdale, 2000), the provision of information materials to satisfy curricular needs (Moura, 1996; Monteiro, 1999), and some support and guidance from specialised staff (Blanshard, 1998).

Whilst recent positive developments (the creation of a school libraries network) were acknowledged (Veiga, 1997), school libraries in Portugal were considered by the respondents and the literature (Pessoa, 1985; Magalhães & Alçada, 1993) as very poor. This makes the public library support to school libraries and to school children all the more relevant. It was partially considered as an investment, since the public library is expected to benefit from this support due to an increase in the information skills of its users and a diminishing of use by students which is sometimes considered as too demanding (Calixto, 1994). However there is also evidence of

some downsides for the public library, since it has been suggested that they are not being given the appropriate resources for this kind of work (Alves & Neves, 1998). School libraries were considered to benefit from increased access to resources and information that otherwise might not be available, and from the transference of technical expertise from the public library.

The support of the public libraries to school libraries is being organised through a newly established service, the School Libraries Support Service (SABE), set up following the guidelines of a report published by the Ministry of Education (Veiga, 1997). The work of this service comprises several aspects: enlargement of the materials provided by the school library via bulk loans (Heeks, 1996), book boxes and visits from mobile libraries; help in setting up projects and bids for the School Libraries Network; support in organising reading promotion activities, displays and exhibitions; and support in technical work and in training of staff (IFLA, 2001).

A wide range of opinions was found regarding the support of public libraries given to homework and study. According to the respondents, schoolchildren and youngsters require public library support for their homework and study, due to a set of social, economic and educational circumstances. Places to study and do homework do not exist or do not meet the student's requirements at school, at home or elsewhere in the community. Whilst many recognise that there is a strong demand from students and agree that the library should work to meet these demands, at the other end of the scale, other respondents, while acknowledging the demand, consider that this is not a role for the public library, and the school should provide for it. In other cases, the impossibility of the public library supporting homework due to shortage of resources was highlighted.

In order to provide this support, the public library needs a set of resources, including support staff, special materials and space. This study found that, when it is available, the support for homework in Portuguese public libraries makes use of the existing resources in the public library. In opposition to this, research carried out in the United Kingdom (Train et. al., 2000; Bevin & Goulding, 1999) suggests the need for appropriate space, materials and staff, if the public library is to satisfy the

students needs. The present study suggests that the support for homework would gain much from co-ordination at strategic level between the Ministries of Culture and of Education.

The support for homework has been considered as bringing several benefits, including the raising of educational standards, and counteracting social inequity. It has also been found that it may improve students' self-confidence, attitudes to independent learning, teacher-student relationships and information skills (Bevin & Goulding, 1999). Furthermore, the present research found and the literature confirmed that supporting homework may benefit the public library, by raising its profile in the community and at a political level (Trainet.al., 2000), and by increasing its attraction amongst children and youngsters.

The present research found that supporting teachers was considered by Portuguese librarians and elected members as one of their roles in supporting education. This support takes a variety of forms, including the provision of books and materials to assist teachers in their activities, the circulation of displays, exhibitions and book boxes, and training, especially in children's literature and library skills. This support was seen as an effective way of public libraries reaching children, increasing the number and the skills of its users. Teachers are also seen as invaluable helpers of public libraries in a two-way co-operation that, with rare exceptions, was considered to work well for both partners.

The support of public libraries for higher education students raised a variety of responses amongst librarians and especially amongst elected members. There was general agreement on the demand placed upon public libraries by these users, especially in towns with private and newly established universities. Up to what point, and indeed if, the public libraries could or should support higher education students, raised several kinds of diverse, even contradictory, responses. The reasons underpinning the arguments against this support were that the library needs of these students should be provided for by the universities (Moura, 1996). Furthermore, the public library was considered as not having sufficient and adequate information resources to meet their needs, except in some exceptional cases associated with



Local Studies or other special collections. However, this study found, and the literature confirmed that, in some cases, students preferred to use public libraries to study and borrow due to a generally friendlier environment (Ericson, 1996; Nicholson, 1999). In spite of the previous considerations, elected members, and specially librarians, tended to show sympathy towards higher education students and considered them as having as much right to use the library as any other member of the community (Unwin et. al. 1998).

A key conclusion of this study is that the public libraries' educational roles have important social outcomes. They may help especially vulnerable sectors of the communities in overcoming barriers to education. The needs of children and young people were distinctly perceived by Portuguese librarians and elected members, alongside with their recognition as especially vulnerable members of the community (Koren, 1998). Other sectors, such as lifelong learners (Green, 1995), the elderly (Bramley, 1991), the handicapped (Craddock, 1997), prisoners (Stevens, 1996), and the economically disadvantaged (Linley & Usherwood, 1998), were found in the literature as facing barriers to education. These sectors, whilst not being ignored, have had only localised attention and lower priorities in Portuguese public libraries.

The barriers to education may vary across sectors, but may be grouped in the following general categories: economical, educational, geographical, individual, and psychological. Whilst children in general may face these barriers, some special circumstances, such as illness, insecurity or cultural background (Elkin & Lonsdale, 1996) may aggravate them further. The findings of the present study confirm that public libraries in Portugal may play a crucial role in helping children to overcome some of these barriers, by providing a wide variety of resources and services for free, especially books and materials, support and guidance by professional staff, and special programmes. The literature indicates that the public library also facilitates access to open and lifelong learning programmes and materials (Comedia, 1993), to ICT (Overbeck, 1997), and especial support for the elderly (Greenhalgh & Worpole, 1995) and prisoners (Lehmann, 2000). However, a set of circumstances have led to a lesser consideration of these groups in Portugal.

The use of the public library as a meeting point, especially by children, young people and the elderly, was considered by many respondents as having a potential educational value. The library helps elderly people overcome isolation by providing opportunities to meet other people, by lending books - which have been considered as a way to fight loneliness - and via special services, such as mobile libraries and visits to homes for the elderly (Linley & Usherwood, 1998). Children and young people use the library to meet, socialize, do group work, or simply as a convenient place to meet friends (Monteiro, 1999). All these groups have educational benefits by attending the activities organised by the library, such as exhibitions, conferences and meetings with authors.

The present study found that public libraries were considered by Portuguese librarians and elected members as having a key role in helping people to learn about themselves and their communities, especially via the Local Studies services (Matarasso, 1998b). These may help in creating, developing and disseminating knowledge about the community in the community and beyond (Nunes, 1996). The library acts as a guardian of sometimes unique local documentation, and publishes and disseminates it (Greenhalgh & Worpole, 1995). Acting frequently in collaboration with community groups, public libraries promote local writers and artists, and support oral tradition. This work has potentially relevant effects in raising individual skills and the pride of the community in its own values and in increasing its self-image and confidence (Linley & Usherwood, 1998). This was considered to have a particular significance in counteracting the effects of demographic mobility and economical and cultural globalisation, which may lead to people losing their roots and sense of belonging. Public libraries were found to be often a motif of pride and an element contributing to the self-esteem and confidence of the community.

#### **10.4. Factors influencing perceptions**

The present research suggests that the visions of Portuguese librarians and politicians on the educational roles of public libraries are affected by a number of factors, acting in different directions. The socio-economic context underlines the

importance of these roles whilst constraining the financing of local authorities. The public perceptions of libraries' educational roles are limited and do not demand greater investment. The absence of legislation on libraries and the bureaucratic culture of local authorities may make them (and librarians) vulnerable to changing circumstances. The evident poorness of resources does not favour much innovation and restrains the development of new services. The lack of research and studies on these issues prevents the development of theory on the roles of libraries in education. Some individual factors (such as education and cultural background) and local factors (such as the size and political allegiance of local authorities) may also influence the perceptions of the respondents.

#### **10.4.1. The socio-economic and educational context**

The respondents to the present study provided evidence, which was confirmed by other sources, that wide sectors of Portuguese society may be considered economically disadvantaged. They also recognised that this may have deep implications in hampering access to education and information, raising several kinds of barriers.

Furthermore, several weaknesses were found in the educational institutions, such as the poor quality of school libraries and a general lack of information skills amongst students and, to a certain degree, amongst teachers. In addition, there is evidence that some higher education institutions also have poor libraries, and some students favour the use of public libraries.

The acknowledgement of these factors may influence the perceptions of the respondents, as they lead to a heavy demand on the public library for educational purposes and increase its relevance as an educational institution.

#### **10.4.2. Poor public perception of the library roles**

Public libraries are a relatively new issue in the Portuguese social and educational context. They have attracted a fair amount of attention amongst the most cultivated and informed public opinion and many echoes of their activities may be found in the local and national media. They have been especially praised for the quality of their

buildings and equipment and for their openness and liveliness, and have caused a positive impression especially when compared with the situation prior to 1986.

However, this research suggests that Portuguese public opinion in general has not as yet understood the diverse implications of the service of public libraries and their full educational, informational and cultural potential, still less in social and economic terms. Public libraries in that country and elsewhere have an image almost exclusively associated with books and reading, and with support to formal education. Several respondents suggested that many people did not consider using the library even when they needed information or books. This may be explained by the fact that most people in Portugal have were not educated in using libraries during their scholarly years. Furthermore, it could be suggested that they are not socially considered as indispensable as other essential roles of the municipalities, such as housing, road building, water supply or public sanitation.

This research suggests that the limited perception of the library roles may have serious and dangerous implications on the perceptions of the educational roles of public libraries amongst Portuguese librarians and, especially, amongst elected members. As an example of this, several elected members acknowledged that libraries were not high in the priorities of the municipality because they were not lobbied about them.

#### **10.4.3. The managerial and legal context**

Respondents to the present study and the literature suggest that a general lack of resources may hamper the extent to which Portuguese public libraries are able to fulfil their educational roles. The most striking aspects are the size of the buildings, found to be small for the number of users they attract, the scarcity of professional librarians, the low use of ICT, and low financing. These factors were often mentioned by respondents who agreed on the importance of the library playing certain roles but felt it impossible in the present circumstances due to a sheer lack of resources.

Another relevant issue raised by this study is the perception, especially amongst librarians, that in order to develop their services the public library would need more autonomy within the structure of the local authority. This may be related to the lack of legislation and also to the general centralised and bureaucratic environment prevalent in Portuguese public administration.

Furthermore, public libraries in Portugal are not a statutory service, and their creation and maintenance depend much on the willingness of local authorities and other political and economic factors. The fact that the Ministry of Culture finances their building and initial collections may explain why so many local authorities have been willing to enter the national programme. But since there are no further obligations once the library is inaugurated, there are reasons to fear for the future development of these services.

Public libraries in Portugal have been involved in collaborative schemes with several local institutions, especially schools and school libraries. However, the collaboration of the public library with the education departments of the local authorities was found to be uneven and piecemeal, lacking strategic planning. It is also obvious that the levels of co-operation and networking amongst public libraries are very low. This is especially important in the new technological context, a factor which may hamper their roles in education.

The present research suggests that a set of managerial issues may influence the visions of librarians and elected members of the educational roles of public libraries, leading to a limited perception of these roles. In summary, those issues are the scarcity of resources, the non-existence of legislation, the lack of autonomy within the context of the municipality, and the poor levels of co-operation amongst public libraries and with the educational departments of local authorities.

#### **10.4.4. The absence of underlying philosophy of the roles of libraries in education**

This study found a distinct lack of theory originating in Portugal on the roles of public libraries in education, and as a matter of fact on library and information studies in



general. The literature originating in the country is scarce and that quoted in this study is, with few exceptions, made up of government reports produced in a short period of time and with a limited scientific base. Many of the writings that have been used are opinion papers and not reports based on evidence found in research.

This may reflect the feebleness of Library and Information Studies in Portugal, where there is still a long way to go for its recognition as a scientific field. Although librarianship studies are undertaken at a post-graduate level, they do not give any academic qualification, i. e., they are not a master, and do not require a dissertation. This means that most librarians in Portugal do not learn research skills in their studies and are not encouraged to undertake research.

The only existing guidelines are those produced by IPLB and their specific aim is to help local authorities in the construction of the new libraries. They do not provide guidance for the development of the services or the functioning of the libraries. There are no guidelines issued by the Portuguese Library Association.

This research suggests that in Portugal there is a distinct lack of an underlying philosophy on the roles of public libraries in education, and a general lack of research and theory on Library and Information Studies. This limits the vision of librarians and to some extent that of elected members and the wider society.

#### **10.4.5. Individual factors**

The present research suggests that the professional background of many respondents, both librarians and elected members, may affect their perceptions of the roles of public libraries in education. Many of them have had some kind of connection with educational institutions. Some librarians had been teachers for a number of years before joining the library profession, and amongst the elected members, some had professional qualifications and were actually teaching, as they were not working full time in the Municipality. Even when they were not working as teachers at the time of the research, in some cases they had a teaching background. Furthermore, many elected members were in charge of both culture and education in the context of their responsibilities in the local authority. Overall, it

may be said that most of the respondents have had or still had close connections with schools. This is most likely to influence their perceptions and made it easy for them to establish relationships with the education community.

The most recent pedagogical theory has emphasised the autonomy of students and the need to learn how to learn, while considering the roles of teachers mainly as facilitators and creators of learning opportunities. In the library profession, the tendency to highlight the librarians' roles of counselling and supporting the access to information and education provides the ground for some points of convergence of both professions. However, a number of librarians and indeed some elected members, appeared to make a sharp distinction between the roles of teachers and those of librarians. This may be associated with a reluctance of librarians in assuming non-traditional roles as well as with partial conceptions of both professions.

Other individual factors may be considered as affecting the perceptions, such as the time in office of elected members and the professional experience of librarians. In both cases, extreme variations were found, ranging from newly elected members or recently appointed librarians to people with some years of experience. With only few exceptions, the time of permanence of politicians was relatively short due to frequent political changes and the natural rotation of the democratic process. Librarians, as a rule, also had only a few years of experience, due to the newness of public libraries in Portugal.

Considering the group of professionals, some differences were also found amongst them, and it was apparent that there was not a single vision of what is the role of a public librarian. It may be suggested that amongst librarians there is a group of young, enthusiastic people, willing to learn and innovate, aware of their professional roles in society. However, some isolated exceptions were also found of a conservative and bureaucratic approach to the profession, even with some traces of disillusionment.

This research suggests that some individual factors, such as the education and professional experience of the respondents, may affect their perceptions of the

educational roles of libraries in opposite directions. The education and the experience of many of them facilitate the association of education and libraries. On the other hand, some limited visions of the roles of both professions may make it more difficult to establish this connection.

#### **10.4.6. Local factors**

The responses to the present study suggest that a number of local factors may influence the views on the roles of public libraries in education. These factors include the ruling political party, the size of the municipality, and types of management practices. However, it is not possible to establish a correlation between these factors and the attitudes towards the educational roles of libraries.

There is evidence that Portuguese local authorities ruled by left wing political parties generally invest more in culture (Neves, 2001). This suggests but does not necessarily prove greater investment in libraries. This research suggests that political allegiance does not affect the perceptions of elected members on the roles of libraries, and the same kinds of similar or different opinions were found across the political spectrum. Up to what point these beliefs are translated into practice, independent of political colour, cannot be clearly stated by this research.

The correlation between the size of library authorities and the quality of their services has been a reason for debate in the United Kingdom. Midwinter & McVicar (1994) suggest that there is a potential for larger authorities to deliver a more efficient library service. It should be noted that the largest library authorities considered in the Portuguese programme are the BM3 (above 50.000 population), and the smallest are up to 20.000, which makes all of them small on the British scale. It could be suggested that smaller libraries are more likely to face shortages of resources, and thus have more difficulties in meeting the educational needs of the communities. However, the data of this research does not allow conclusions on the extent to which this influenced the respondents' perceptions.

It is apparent from the data of this research that, whilst acting within the same legal framework, diverse organizational cultures and management approaches are

prevalent in different municipalities. In some cases there is an interest in modernising administrative structures, adopting creative approaches to the existing legislation and favouring innovation in service design and delivery. On the other hand, examples were found of prevalence of an authoritarian, static and centralized approach to management. These different styles may impact diversely on the perceptions of both librarians and elected members.

### **10.5. Professionals and politicians**

The present research suggests that amongst Portuguese librarians and elected members there are wide areas of convergence in the views about the educational roles of public libraries although some differences should be highlighted. It could be safely suggested that whilst there is general agreement on the relevance of most educational roles of public libraries, clear differences emerged about the ways of fulfilling those roles.

Whilst there is a general trend amongst the respondents to place a greater emphasis on the education roles more clearly associated with support to educational institutions, this trend is much more distinct amongst elected members than amongst library staff. As mentioned earlier most elected members in charge of libraries also have responsibilities for education and this may blur the boundaries between these sectors of their work. Librarians, whilst considering support to formal education as important, tended to dissociate the library from the school context (often with negative connotations associated with compulsory work, tests and exams), and emphasised reading for pleasure and the use of the library for leisure purposes.

The sharpest differences in the perceptions of these two groups are associated with managerial issues. It has been suggested that the relationship between libraries and their parent institutions are often subject to tensions because these may see the library as having too much independence, and, while taking pride in them, tend to consider them as too costly (Line, 1997). Being recent bodies within the structure of local authorities in Portugal, libraries are fighting for recognition and increased levels

of independence. This tension has frequently emerged from the data of the present study as a tension between professionals and elected members. The roles of these two groups are anything but clearly defined, and the complaints of librarians about too strong an interference of elected members in their work were recurrent throughout the interviews. This may be explained by the domain theory of Kouzes & Mico (1979), who suggest a frequent interference of policy makers in what they call the "management domain". The converse, apparently, is much less frequent and elected members were as a rule willing to praise the work of the staff while these were frequently much more critical both regarding councillors and themselves.

Besides the issue of autonomy, other managerial aspects mark a distinction between the views of elected members and those of librarians. These were much more emphatic in the acknowledgement of the problems associated with the quantity and quality of the resources. This may be explained by the fact that it is the professionals who are in the frontline of service provision and are thus the first to feel the impact that the lack of resources may have on the quality of library support to education. Elected members, on the other hand, are those who take many decisions that influence the resources available and thus feel responsible for them. Besides, elected members, as part of the Council, have a wider vision of the services of the municipality, and face their own difficulties in convincing political colleagues of the needs for investment in the cultural area. This having been said, some elected members were also quite ready to admit that library resources needed increasing, and as a rule valued the work of the public library, praised it, and were ready to fight some battles on its behalf.

## **10.6. Recommendations**

The conclusions of the present research point to a set of actions that might help public libraries in Portugal to play a more meaningful role in supporting education. Whilst some of these measures apply specifically to the educational roles, others would have a general impact on the public library service, which in turn would also influence the support to education.



- Some respondents believed that legislation would enhance the service of public libraries. This might help to settle and clarify their roles, establish responsibilities of central government and local authorities, determine the levels of financing, and define a framework to clarify the responsibilities of professionals and politicians.
- Portuguese public libraries clearly lack guidelines for the development of services in diverse areas, including education. The guidelines presently produced by IPLB are limited to the specifications of library buildings, number of staff, equipment and documentation. While some orientations for the services may be derived from them, these are very general and incomplete, and fall short of dealing with many aspects of the service.
- The non-existence of standards prevents a proper assessment of the services. Standards should establish the benchmarks for service delivery and this should be a condition for further State support.
- In order to play a meaningful role in supporting education, Portuguese public libraries distinctly need more resources than those presently available to them. Staff and ICT are critical aspects. The number of professional librarians should increase up to the levels recommended by IFLA, and continuous training programmes should be made available, focusing on user support and ICT. Equally, the levels of ICT should be incremented up to levels similar to those of other European countries, and its use should be widened in fields such as information provision and content production. Equally, the role of public libraries as a place for learning ICT should be augmented.
- Libraries in different sectors (school, academic and public) would benefit from a clearly defined policy of collaboration at strategic level, namely between the ministries of Culture, Education and Employment.
- It is very apparent that the low levels of service provision in some school and academic libraries hamper the harmonious development of public libraries, while making their educational roles more significant. The Ministry of Education should

pay careful attention to the development of school and academic libraries and raise the provision of services in these libraries to acceptable levels.

- Public libraries should focus more on purposeful learning, enlarging their activities in supporting users, especially those seeking the library for educational purposes, rather than simply making resources available. This would mean, for instance a great increase in the levels of support, the provision of literacy classes and facilitating tutorial support for learners.
- Animation activities should be considered as a part of the normal work of the library but their present relevance should be carefully considered as they appear to be sometimes viewed as an aim on in themselves rather than as a means to increase library use.
- Public libraries should work to foster the social awareness and recognition of their roles in education, literacy and lifelong learning. This might be done via a systematic intervention and networking with organisations in these fields.
- Public libraries need to establish and strengthen formal schemes of co-operation and networking, firstly, amongst themselves, and secondly with other institutions or organisations, such as the educational departments of the local authorities and academic libraries.
- Public libraries in Portugal lack an underlying theory of their educational roles. This situation may only be overturned by the development of studies in this field and further research, as suggested in the next section of this chapter.

### 10.7. Further research

The present study is the first major research undertaken in Portugal dealing with public libraries, and its author is the first academic or professional originating in this field aiming at obtaining a doctorate. This and other facts suggest how insufficient the research and the theory of public libraries are in Portugal, and reflect the number

and quality of literature originating in the country. It also suggests just how much needs to be studied and researched in a field and context of which so little is known.

The scope of this research is fairly wide in spite of having being narrowed by focusing on the perspectives of politicians and professionals. It may be considered as a ground clearing exercise on the educational roles of public libraries in Portugal, and most of its findings may be seen as a basis for further research, using other methods and other informants. Whilst many results are visible, it may be said that it suggests more questions than it provides answers.

The previous section recommended that Portuguese public libraries should have guidelines for their educational roles. These guidelines for good practice could only be produced via research, or rather several research projects, listening to the diverse stakeholders: professionals, politicians and several kinds of users and potential users.

Each one of the educational roles found by this study might in itself constitute a topic for further research with different perspectives. For instance, it would help to clarify further the educational roles if each one of them was taken separately and studied in depth, using as informants the learners and other users and potential users of the library service. Whilst this study has used a qualitative methodology, it acknowledges that quantitative data could help in clarifying these roles and make them more visible to a wider audience. Other methods of collecting data could also be considered, such as survey questionnaires for the quantitative approaches, and case studies, focus groups or participant observation for naturalistic inquiry. The use of these different methods in further research would contribute to the reinforcement and further development of an underlying theory of the roles of public libraries in education.

In spite of the existence of an institution co-ordinating the work of public libraries, many different perspectives about the educational roles were found throughout the country. This may raise the question of why there are so many different perspectives, how they arose, and what may influence them. The present study

provides answers to some of these questions, but more research would help to clarify the issue further.

Very different opinions from staff and elected members were also found in the same local authority. This research suggested that domain theory might partially explain these differences, especially as far as management is concerned, but the theme would benefit from further clarification regarding other issues and considering that other variables might be involved.

This study found that animation activities were considered paramount in many aspects of library work, influencing, perhaps not always positively, many aspects of the support to education. However there is little evidence of the impact of these activities on the learners and on the library itself. Research aiming at clarifying the outcomes of these activities would help in establishing their real place in the context of library support to education.

This research has suggested that amongst the respondents there are different and conflicting conceptions of the roles of librarians in supporting education. These roles need clarification, specially considering their convergence with those of teachers.

The size of local authorities in Portugal is very variable, but most of them may be considered small, and it should be noted that the smallest type defined by IPLB applies to authorities with less than 20.000 inhabitants. The influence of the size of local authorities on the library educational roles is another aspect that would benefit highly from further research.

Several additional and specific topics were identified throughout the present study that should be investigated in order to better understand the educational roles of public libraries in Portugal, such as:

- The reasons behind the disparity of opinions of the respondents to this research, relating to the needs of lifelong learners, and how those needs are perceived;
- The reasons why respondents lack to consider Portuguese public libraries as important meeting places for different cultures;

- The discrepancies between the data of the present study and other evidence available regarding the provision of information resources in Portuguese public libraries;
- Is censorship an issue in Portuguese public libraries?

## **10.8. Summary**

This study took place in a scenario characterised by constant and increasing changes. Public libraries in Portugal have been going through a process of intense transformations during the last two decades starting from a very low level of service. Overall, these transformations are resulting in a national programme of construction of new libraries attuned to some of the best practices in other countries of the European Union. These new public libraries are all the more relevant, considering the low socio-economic, cultural and educational levels of many communities, but their educational roles may be hampered by a set of constraints.

The model of the public library emerging from this research is clearly one of an educational library. Overall, the respondents considered it as having the potential of playing relevant educational roles in the fields of literacy and lifelong learning, in supporting the educational institutions of the community, and in helping learners to learn about themselves and their communities. However, a clear examination of this picture unveils a set of perceptions suggesting poor levels of personal support, advice and guidance to the learners, matched by a constraining low level of resources.

This study suggests that the views of the respondents may be influenced by a set of factors that, whilst underlying the educational needs that may be met by public libraries, also have the contradictory effect of hindering the possibilities of the public library playing these roles in a significant way. These factors are the socio-economic and educational context, the poor perception of library roles, the managerial and legal context, the absence of underlying philosophy of the roles of libraries in education, and individual and local factors.



This chapter presents a set of recommendations grounded on the findings of this research. It is suggested that Portuguese public libraries could play their educational roles more efficiently if:

- they were duly established in national legislation;
- there were guidelines to help in developing the services and standards for assessment;
- they had more resources;
- there was more collaboration amongst departments in central government;
- there were better school and academic libraries;
- they focus on purposeful learning;
- they re-evaluate the role of animation activities;
- they work to foster social awareness of their roles;
- they develop formal co-operation and networking;
- there was more theory and research on their educational roles.

This chapter concludes by listing a set of issues raised by the present study, which would benefit from further research. The lines of investigation suggested are:

- Each one of the educational roles of public libraries identified in the present research could be by itself a topic for further research, using other methods and other informants;
- Production of guidelines and standards;
- The reasons for different perspectives on the roles of libraries in different municipalities;
- The reasons for different perspectives in the same municipality;
- The educational value and impact of animation activities;
- The roles of librarians in supporting education;

- How the size of local authorities may influence the provision of educational services by public libraries.

The present research concluded that Portuguese librarians and elected members view the public library as an educational institution. However it is obvious, especially in comparing their perceptions with other models, such as the one proposed by Brophy (Brophy, Allred & Allred, 1996), that theirs is a vision that is constrained by a number of factors. Amongst these are individual and local factors, which include a limited social and political perception of the libraries' roles, the absence of an underlying philosophy on the roles of libraries in education, the managerial and legal context, and the socio-economic context.

Portuguese public libraries have come a long way in less than two decades. They re-emerged from a long sleep and are in the process of establishing themselves as key institutions in social, cultural and educational terms. In this process they have had to cope and try to keep up with technological and social change. At the same time they have experienced the emergence of a society that in a way rediscovered the values of enlightenment by stressing the importance of learning, education and knowledge, alongside that of democracy, equity and inclusion.

The present research found evidence of much advancement in Portuguese public libraries, and more specifically of their potential as educational institutions. But it also highlighted some of their weaknesses and the constraints they are facing. This development would not have been possible without the elected members' political vision and the librarians' professionalism and perseverance. Their perceptions on the educational roles are the result of a set of specific conditions and simultaneously are highly influential in the development of services. They are key players in the process that is defining the kinds of roles public libraries will or will not have in the learning society. In the end much will depend on their own capabilities of learning from this experience. The purpose of this research will be accomplished if it contributes, albeit modestly, to this process.

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# APPENDIXES

JOSÉ ANTÓNIO CALIXTO

Av<sup>a</sup> RODRIGUES MANITO, 101-2º DTº

2900 SETÚBAL

Telef: (065)552782

E-mail: lip96jac@sheffield.ac.uk

Setúbal, 21 de Outubro de 1997

Caro (a) colega

Estou actualmente a desenvolver um trabalho de investigação com vista à obtenção do grau de Doutor na Universidade de Sheffield, em Inglaterra.

Esta investigação tem como tema *"Os papéis educacionais das bibliotecas públicas em Portugal"* e visa obter conhecimento sobre as percepções que os(as) técnicos(as) das bibliotecas e os(as) políticos(as) têm acerca destes papéis. O trabalho de campo desenvolve-se em duas fases distintas: em primeiro lugar estou a enviar o questionário anexo para todas as bibliotecas públicas já abertas que integram a Rede Nacional de Bibliotecas Públicas; em segundo lugar, e a partir dos dados obtidos seleccionarei cerca de doze Municípios onde ocorrerá uma investigação mais pormenorizada, com entrevistas pessoais a dois técnicos das bibliotecas e a dois políticos em cada uma. Aproveito para esclarecer que esta selecção terá como critérios principais a obtenção de uma máxima variação (rural/urbano, grandes/pequenas bibliotecas, etc.).

O objectivo desta minha carta é pedir o favor da sua colaboração, preenchendo o questionário em anexo e enviando-mo dentro do envelope-resposta fornecido. Por favor faça-o dentro do prazo que lhe é solicitado, isto é até ao dia 21 de Novembro. No entanto, as respostas que lhe peço são tão simples que, para evitar esquecimentos, sugeria que respondesse já na volta do correio. Além disto, se a sua biblioteca for escolhida para a segunda fase da investigação, gostaria de saber da sua disponibilidade para me receber e ser entrevistado(a).

Entretanto gostaria de sublinhar que as respostas a este questionário serão mantidas em estrita confidencialidade e serão usadas apenas com fins académicos.

Agradeço antecipadamente a sua colaboração e comprometo-me a informá-lo(a) em qualquer caso, seja a sua biblioteca escolhida ou não para a segunda fase da investigação.

Aceite os meus melhores cumprimentos,

José António Calixto



## Os papéis educacionais das bibliotecas públicas em Portugal

## QUESTIONÁRIO

Os seguintes papéis foram identificados, através de uma revisão de literatura, como sendo aqueles que as bibliotecas públicas desempenham, ou podem desempenhar, na realização dos seus fins educacionais. No seu entender, a biblioteca onde trabalha está ou não actualmente a desempenhar estes papéis, e caso a resposta seja negativa, pensa que terá condições para os desempenhar no futuro próximo? Por favor responda assinalando na tabela abaixo as opções que melhor descrevem a sua opinião.

	Desempenha	Não Desempenha	Deveria Desempenhar	É provável que desempenhe dentro de 5 anos
1. Secções infanto-juvenis				
2. Instalações para convívio da juventude				
3. Serviços formais de educação (Ex: classes de adultos)				
4. Apoio às escolas, principalmente através do apoio às bibliotecas escolares				
5. Apoio a estudantes universitários				
6. Salas específicas para estudo e trabalhos de casa				
7. Apoio ao estudo independente				
8. Apoio à aprendizagem ao longo da vida				
9. Apoio à literacia				
10. Apoio ao desenvolvimento de habilidades informáticas				
11. Educação de utilizadores				
12. Desenvolvimento de habilidades de informação				

## Os papéis educacionais das bibliotecas públicas em Portugal

**Gostaria agora de confirmar os seguintes dados relativos à sua biblioteca:**

Nome da Biblioteca: .....

Morada: .....

Código Postal: .....

Telefone:.....Fax:.....E-mail: .....

Bibliotecário responsável: .....

Tipo de biblioteca: BM1 ☐ BM2 ☐ BM3 ☐

Teria disponibilidade para cooperar na segunda fase da investigação concedendo-me uma entrevista (cerca de uma hora)? .....

Pensa que haveria disponibilidade para que o vereador da cultura e um vereador do maior partido da oposição me concedessem idêntica entrevista? (Sei que a altura não é muito própria para responder a esta pergunta principalmente por causa das eleições; mesmo assim gostaria de ter a sua opinião, obviamente sem nenhum compromisso) .....

Por favor, utilize o espaço abaixo para qualquer informação ou comentário que ache relevante para a investigação.

.....

.....

.....

.....

.....

**Por favor, assine e devolva, até ao próximo dia 21 de Novembro, utilizando o envelope resposta que segue junto.**

**Muito obrigado pela sua colaboração.**

Data: ...../...../1997

Assinatura do responsável por esta informação

.....

JOSÉ ANTÓNIO CALIXTO

Av<sup>a</sup> RODRIGUES MANITO, 101-2º Dtº

2900 SETÚBAL

Telef: (065)552782

E-mail: lip96jac@sheffield.ac.uk

Setúbal, 21 October 1997

Dear Colleague

I am presently working on a doctoral programme for the University of Sheffield.

For this I am conducting a research on *"The educational roles of public libraries in Portugal"*. It aims to obtain knowledge about librarians and elected members perceptions of these roles. Fieldwork develops in two different phases: firstly I am sending the questionnaire enclosed to all the public libraries already open under the Public Libraries National Network, and secondly, from the answers obtained with the questionnaire, I will select around twelve Municipalities for a more detailed approach, using an in-depth interview with two members of the staff (at least one librarian) and two elected members. I would like to clarify that this selection will have maximum variation as main criteria (rural/urban, large/small libraries, etc.)

The aim of this letter is to ask for your collaboration, filling in the enclosed questionnaire, and sending it back to me, using the envelope supplied. Please answer not later than 21 November, and since the questionnaire is so small and easy to answer I would even suggest that you reply straight away. On the other hand, in case your library is chosen for the second phase, I would like to know of your availability to be interviewed.

Please be assured that the replies to this questionnaire will be kept in strict confidentiality and will be used only for academic purposes.

Thank you in advance for your good collaboration; meanwhile I will inform you whether your Municipality is chosen or not for the second part of the research

Please accept my best regards

José António Calixto

## The educational roles of public libraries in Portugal

### QUESTIONNAIRE

The following roles have been identified, through a literature review, as those public libraries play, or may play, in the realization of their educational roles. In your opinion, the library where you are working now is playing these roles or not, and if not, do you think you will have conditions to play these roles in the near future? Please answer marking in the table the option that best describes your opinion.

	Is playing	Is not playing	Should play	Is likely to play in 5 years
1. Libraries for children and young people				
2. Facilities for the socialisation of youngsters				
3. Formal educational services				
4. Support to schools mainly via School Library Service				
5. Support to University Students				
6. Study rooms and homework centres				
7. Support to independent learning				
8. Support to lifelong learning				
9. Support for literacy				
10. Support for IT skills				
11. User education				
12. Development of information skills				



The educational roles of public libraries in Portugal

Could you please confirm the following data about your library:

Name of the library: .....

Postal address: .....

Postal Code: .....

Telephone:..... Fax:..... E-mail: .....

Librarian in charge: .....

Size of the library: BM1 ☐ BM2 ☐ BM3 ☐

Would you be available to help in the second phase of the research, by giving me an interview (about one hour)? .....

Do you think the councillor in charge of cultural affairs and another councillor of the major party in opposition would be available for a similar interview? (I am aware that this is not the most appropriate time to answer this question, mainly because of the coming elections; even so I would like to have your opinion, which obviously doesn't mean any compromise for you)

.....

.....

Please use the space bellow for any other information or coments you find relevant for the research.....

.....

.....

Please sign and send it back to me not later than 21 November using the envelope supplied.

Thank you very much for your collaboration.

Date: ...../...../1997

Signature of the person responsible for this information

.....



José António Calixto

RUA NOVA SINTRA, 96 - 2º Esqº

2910 SETÚBAL

2605771

TELEF: 065 30510 \* 0936

Setúbal, date

#### **ASSUNTO: Pedido de entrevista**

Estou actualmente a desenvolver um trabalho de investigação integrado num programa de doutoramento na Universidade de Sheffield, em Inglaterra.

Esta investigação tem como tema *“Os papéis educacionais das bibliotecas públicas em Portugal”* e visa obter conhecimento sobre as percepções que os(as) políticos(as) e os(as) técnicos(as) das bibliotecas têm acerca destes papéis. O trabalho de campo desenvolve-se em duas fases distintas: em primeiro lugar enviei um questionário para todas as bibliotecas públicas já abertas que integram a Rede Nacional de Bibliotecas Públicas; em segundo lugar, selecionei doze Municípios tendo como critérios principais a obtenção de uma máxima variação (rural/urbano, grandes/pequenas bibliotecas, etc.). Nestes Municípios estou a desenvolver uma investigação mais pormenorizada, com entrevistas pessoais a dois eleitos e a dois técnicos das bibliotecas em cada uma.

A partir dos dados já obtidos, esse Município enquadra-se dentro dos critérios acima referidos pelo que gostaria de avançar aí com o meu trabalho de investigação.

O objectivo desta carta é pedir o favor da sua colaboração, concedendo-me uma entrevista no âmbito do tema acima referido. Esta entrevista teria lugar num local por si escolhido, em data e hora a combinar e teria uma duração de entre 40 minutos e uma hora.

Conto estar nessa região do País na próxima semana de 20 a 24 de Julho e, por outro lado, devo fazer quatro entrevistas nessa Autarquia que, se fosse possível, seria conveniente terem lugar no mesmo dia. Peço assim o favor de me receber dentro destas datas.

Brevemente farei um contacto telefónico com os seus serviços a fim de confirmar a sua disponibilidade e combinar os pormenores relativos à data, hora e local da entrevista.

Gostaria de acrescentar que o meu estudo não tem qualquer relação com organizações políticas ou comerciais, tendo fins exclusivamente académicos; por outro lado os respondentes não serão identificados no relatório final.

Compreendo que tanto os eleitos como os técnicos das bibliotecas têm o seu tempo muito ocupado, mas espero que possa responder afirmativamente a esta minha solicitação, participando assim no que espero seja uma investigação com interesse para o desenvolvimento das bibliotecas públicas no nosso país.

Se tiver algumas dúvidas em relação a este projecto, não hesite em contactar-me na morada acima, ou através dos telefones 065-30510 ou 0936-2605771. Ficarei muito grato com a sua colaboração.

Aceite os meus melhores cumprimentos,

José António Calixto

JOSE ANTONIO CALIXTO  
RUA NOVA SINTRA, 96 - 2º Escº  
2910 SETÚBAL  
2605771

TELEF: 065 30510 \* 0936

Setúbal, date

Dear Sir/Madam

**SUBJECT: Request for an interview**

I am presently working on a research project for a doctoral programme in the University of Sheffield, England.

The theme of this research is ***"The educational roles of public libraries in Portugal"*** and its purpose is to create knowledge about the perceptions of librarians and elected members about these roles. The fieldwork takes place in two distinct phases: firstly a questionnaire was sent to all the public libraries that make up the National Public Libraries Network and are already open to the public. For the second phase, twelve local authorities have been selected, following a number of criteria, such as localisation and size of the municipality. In these municipalities, a more detailed study is going to take place with individual interviews to two elected members and two members of the staff.

From the data of the questionnaires, that Municipality fits in the above-mentioned criteria, and I would like to continue my research project there.

The purpose of this letter is to ask for your collaboration, by giving me an interview on the topic above mentioned. This interview would take place in a location of your choice, at a date and time to be arranged, according to your convenience, and would last between forty minutes and one hour.

I plan to be in that region of the country during the week of \_\_ to \_\_ of the month of \_\_\_\_\_, and, since I will have to make four interviews in that municipality, it would be very convenient if we could arrange them for the same day. I would be grateful if you could make an appointment within these dates.

I will be contacting your support services by telephone in the near future in order to confirm your availability and arrange the details regarding the day, hour and place of the interview.

I would like to add that this study has no connection whatsoever with political or commercial organisations, and has an exclusively academic purpose; besides, the respondents will not be identified in the final report.

I understand that both elected members and the staff of the library have tight working schedules and are very busy, but I hope you will be able to give a positive answer to my request, participating in what I hope will be a research which results will be relevant for the development of public libraries in our country.

Should you have any doubts or concerns about this research, please do not hesitate in contacting me in the above-indicated address, or via the telephones 065-30510 or 0936-2605771. I shall be grateful with your collaboration.

Yours sincerely

José António Calixto

**UNIVERSITY OF SHEFFIELD**

**DEPARTMENT OF INFORMATION STUDIES**

# **Os papéis educacionais das bibliotecas públicas em Portugal**

**Percepções políticas e profissionais**

uma investigação por

**José António Calixto**

## **ENTREVISTA**

**MARÇO**

**1998**

Registo da entrevista com (Nome)

.....

Bibliotecário ☐ TABD ☐

Vereadora cultura ☐ Vereador(oposição) ☐

Câmara Municipal de .....

Data: ..... - ..... 199.....

## 1. INTRODUÇÃO

Gostaria de começar por agradecer a sua amável colaboração, tanto por ter respondido ao questionário como por aceder em receber-me e dar-me esta entrevista.

Como mencionei na minha carta anterior, o fim desta entrevista é obter a sua opinião sobre os papéis educacionais das bibliotecas públicas em Portugal. Gostaria de sublinhar o facto de este estudo que estou a levar a cabo ter propósitos exclusivamente académicos, e posso assegurar-lhe que todas as respostas permanecerão confidenciais. Embora possa vir a citar algumas das suas palavras no meu relatório final, não haverá nenhuma possibilidade de identificação de indivíduos ou de bibliotecas.

Tal como havíamos combinado, a entrevista será gravada de forma a que não se perca nada do que disser. Contudo, se houver alguma pergunta a que prefira não responder, ou se em qualquer altura quiser terminar a entrevista, é livre de o fazer.



## 2. OS PAPEIS EDUCACIONAIS

2.1. Começaria por perguntar quais são, na sua opinião, os papéis educacionais das bibliotecas públicas.

2.2. Os serviços e/ou instalações a seguir enumerados foram identificados, através de uma revisão de literatura, como sendo essenciais para que as bibliotecas públicas desempenhem, ou possam desempenhar, os seus diversos papéis educacionais. Alguns podem ser considerados mais importantes do que outros. Gostaria de ter a sua opinião sobre a importância relativa destes papéis. Poderia dizer-me, por favor, utilizando os termos desta ficha, se considera cada um deles “Sem nenhuma importância”, “Pouco Importante”, “Indiferente”, “Importante” ou “Muito Importante”.

	1	2	3	4	5
	Sem nenhuma importância	Pouco Importante	Indiferente	Importante	Muito Importante
2.2.1. Secções infanto-juvenis					

2.2.2. Pode dizer-me porque pensa assim?

	1	2	3	4	5
	Sem nenhuma importância	Pouco Importante	Indiferente	Importante	Muito Importante
2.2.3. Instalações para convívio da juventude					

2.2.4. Pode dizer-me porque pensa assim?

	1	2	3	4	5
	Sem nenhuma importância	Pouco Importante	Indiferente	Importante	Muito Importante
2.2.5. Serviços formais de educação					

2.2.6. Pode dizer-me porque pensa assim?

	1	2	3	4	5
	Sem nenhuma importância	Pouco Importante	Indiferente	Importante	Muito Importante
2.2.7. Apoio às escolas, principalmente através do apoio às bibliotecas escolares					



2.2.8. Pode dizer-me porque pensa assim?

2.2.9 Apoio a estudantes universitários	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
---	------------------------------	-----------------------	------------------	-----------------	-----------------------

2.2.10. Pode dizer-me porque pensa assim?

2.2.11. Salas específicas para estudo e trabalhos de casa	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
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2.2.12. Pode dizer-me porque pensa assim?

2.2.13 Apoio ao estudo independente e à autoaprendizagem	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
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2.2.14. Pode dizer-me porque pensa assim?

2.2.15. Apoio à aprendizagem ao longo da vida	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
---	------------------------------	-----------------------	------------------	-----------------	-----------------------

2.2.16. Pode dizer-me porque pensa assim?

2.2.17. Apoio à literacia	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
---------------------------	------------------------------	-----------------------	------------------	-----------------	-----------------------

2.2.18. Pode dizer-me porque pensa assim?

2.2.19. Apoio ao desenvolvimento de capacidades relacionadas com a informática	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
--	------------------------------	-----------------------	------------------	-----------------	-----------------------

2.2.20. Pode dizer-me porque pensa assim?

2.2.21. Educação de utilizadores	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
----------------------------------	---------------------------------	--------------------------	------------------	-----------------	--------------------------

2.2.22. Pode dizer-me porque pensa assim?

2.2.23. Desenvolvimento de habilidades de informação	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
---	---------------------------------	--------------------------	------------------	-----------------	--------------------------

2.2.24. Pode dizer-me porque pensa assim?

2.3. Gostaria de continuar, pedindo-lhe a sua opinião sobre quais destes papéis das bibliotecas públicas são os mais importantes e os menos importantes no que diz respeito à educação. Escolha por favor desta lista quais são os três papéis mais importantes e os três menos importantes.

1. ....
2. ....
3. ....
- 10.....
11. ....
- 12.....

2.4. Poderia explicar porque considera que estes são os mais e os menos importantes?

2.5. A literatura sugere que há quatro grandes áreas em que se desenvolve o serviço das bibliotecas públicas: informação, educação, cultura e lazer. Por favor, faça uma lista, organizando-as de acordo com a importância que atribui a cada uma delas.

2.6. Pode dizer-me porque pensa assim?

### 3. CASOS E CONTEXTOS

*Depois desta primeira parte em que abordámos em termos gerais os papéis das bibliotecas públicas relacionados com a educação, vamos agora abordar alguns aspectos mais concretos da actividade desta biblioteca, relacionando-a sempre com o contexto geral, local e nacional, em que opera.*

3.1. Poderia dizer-me quais são, em sua opinião, os pontos fortes da sua biblioteca na prestação de serviços relacionados com os papéis educacionais que temos estado a discutir?

#### SUGESTÕES

- A) *Cooperação com as escolas*
- B) *Cooperação com outras bibliotecas*
- C) *Motivação do pessoal*
- D) *Criatividade*

3.2. Como descreveria a relação desta biblioteca com os Serviços de Educação da Câmara Municipal?

3.3. Esta biblioteca coopera com outros organismos educacionais exteriores à Câmara Municipal?

3.4. Se a resposta for positiva, pode dar-me alguns exemplos?

3.5. Esta cooperação funciona bem ou não? Por favor pormenorize.

---

3.6. Quais são, em sua opinião as maiores fraquezas desta biblioteca no cumprimento dos seus papéis educacionais?

#### SUGESTÕES

- A) *Espaço*

B) *Documentação*

C) *Pessoal / Quantidade, formação*

D) *Falta de promoção*

3.7. Quais são, em sua opinião as razões destas fraquezas?

3.8. O que é que pode ser feito para as ultrapassar?

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3.9. Quais são as novas oportunidades - se considera haver algumas - que vê para o desenvolvimento desta biblioteca, resultantes do desenvolvimento dos seus papéis educacionais?

#### SUGESTÕES

A) *Mais utilizadores*

B) *Melhor utilização dos recursos existentes*

C) *Atrair novos financiamentos*

D) *Melhorar a imagem da biblioteca junto do público em geral*

3.10. Quais são, em sua opinião, as implicações práticas, em termos de política e de gestão, do desenvolvimento destes serviços?

#### SUGESTÕES

A) *Maior atenção e visibilidade políticas*

B) *Necessidade de mais recursos*

C) *Mais autonomia*

D) *Maior descentralização organizativa*

---

3.11. Quais são, em sua opinião, os maiores constrangimentos que esta biblioteca enfrenta ou pode enfrentar no cumprimento dos seus papéis educacionais?

## SUGESTÕES

A) *Falta de consciência política e social*B) *Falta de autonomia*C) *Constrangimentos financeiros*D) *Organização*

3.12. O que é que em sua opinião deverá ser feito para que esta biblioteca seja capaz de enfrentar e vencer estes constrangimentos?

3.13. Qual é a sua antevisão do futuro destes serviços nesta biblioteca dentro de um período de dez anos?

3.14. Em que medida acha que a situação referida para esta biblioteca (em termos de pontos fortes e fracos, oportunidades e constrangimentos) se aplica ao conjunto do país?

3.15. Qual é a sua antevisão do futuro destes serviços nas bibliotecas públicas em termos gerais no nosso país dentro de um período de dez anos?

## 4. IDENTIFICACAO

*De modo a poder comparar esta investigação com outras realizadas noutros países, vou a seguir pedir-lhe alguns dados relativos à sua identificação.*

4.1. Masculino / Feminino

4.2. Idade: Menos de 30 anos ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60 ou mais ☐

4.3. Qualificações profissionais ou académicas:

.....

4.4. Posição na Câmara Municipal: .....

4.5. Número de anos na posição actual .....

4.6. Partido político (Não válido para a entrevista com os profissionais):



## 5. CONCLUSÃO

5.1. Antes de acabar poderia dizer-me se consegue identificar no seu passado algumas razões ou elementos que tenham contribuído para formar as suas idéias e opiniões sobre os assuntos que temos estado a discutir?

### SUGESTÕES

A) *Tipo e nível de educação*

B) *Experiência profissional*

5.1. Há algum assunto que considera importante para este tema e que não tenhamos abordado ao longo desta entrevista?

5.2. Nesse caso, quer falar sobre ele?

5.3. Estaria interessado(a) em receber mais informação sobre o desenvolvimento desta investigação?

Mais uma vez, muito obrigado pela sua cooperação. sei que é uma pessoa muito ocupada e foi muito amável em gastar algum do seu tempo respondendo às minhas perguntas. As suas respostas vão ajudar-me muito e, além do mais, foi para mim um grande prazer falar consigo.

ESCALA PARA A PERGUNTA 2.2.

XXXXXXXXXXXXXXXXXXXXXXXXXXXX	1 Sem nenhuma importância	2 Pouco Importante	3 Indiferente	4 Importante	5 Muito Importante
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LISTA PARA A PERGUNTA 2.3.

- Salas específicas para estudo e trabalhos de casa
- Apoio a estudantes universitários
- Serviços formais de educação
- Secções infanto-juvenis
- Instalações para convívio da juventude
- Desenvolvimento de habilidades de informação
- Apoio ao estudo independente e à autoaprendizagem
- Apoio à aprendizagem ao longo da vida
- Apoio ao desenvolvimento de capacidades relacionadas com a informática
- Apoio à literacia
- Educação de utilizadores
- Apoio às escolas, principalmente através do apoio às bibliotecas escolares

**UNIVERSITY OF SHEFFIELD**

**DEPARTMENT OF INFORMATION STUDIES**

## **The educational roles of public libraries in Portugal**

**Professional and political perceptions**

a research by

**José António Calixto**

# **INTERVIEW SCHEDULE**

**MARCH**

**1998**

Record of interview with (name) .....

Librarian ☐ Library assistant ☐

Councillor(ruling) ☐ Councillor(opposition) ☐

Municipality.....

Date ..... - ..... - 199.....

## 1. INTRODUCTION

I would like to start thanking you for your kind collaboration both by answering the questionnaire and by receiving and giving me this interview.

As I mentioned in my previous letter the aim of this interview is to obtain your opinion regarding the educational roles of public libraries in Portugal. I would like to underline the fact that the study I am carrying out has a strictly academic purpose, and I can assure all your answers will remain confidential. Although I may quote some of your words in the final report, there will be no possibility of identification of individuals or libraries.

As we have agreed the interview will be recorded so that nothing of what you say is lost. But if there is any question that you prefer not to answer, or if at any time you want to end the interview, you are free to do so.

## 2. EDUCATIONAL ROLES

2.1. I would start asking what are in your opinion the educational roles of public libraries.

2.2. The following roles have been identified, through a literature review, as those public libraries play, or may play, in the realisation of their educational roles. Some may be considered as more important than others. I would like to have your opinion on the relative importance of this roles. Could you please tell me, using the terms of this card, whether you consider each one of them as "Not at all important", "Of little importance", "Neither important nor unimportant", "Important" or "Very important".

2.2.1. Libraries for children and young people	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
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2.2.2. Could you tell me why do you think that?

2.2.3. Facilities for the socialisation of youngsters	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
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2.2.4. Could you tell me why do you think that?

2.2.5. Formal educational services	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
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2.2.6. Could you tell me why do you think that?

2.2.7. Support to schools mainly via School Library Service	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
---	---------------------------	---------------------------	--	----------------	---------------------

2.2.8. Could you tell me why do you think that?



2.2.9 Support to University students	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
--------------------------------------	---------------------------	---------------------------	--	----------------	---------------------

2.2.10. Could you tell me why do you think that?

2.2.11. Study rooms and homework centres	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
--	---------------------------	---------------------------	--	----------------	---------------------

2.2.12. Could you tell me why do you think that?

2.2.13. Support to independent learning	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
---	---------------------------	---------------------------	--	----------------	---------------------

2.2.14. Could you tell me why do you think that?

2.2.15. Support to lifelong learning	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
--------------------------------------	---------------------------	---------------------------	--	----------------	---------------------

2.2.16. Could you tell me why do you think that?

2.2.17. Support for literacy	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
------------------------------	---------------------------	---------------------------	--	----------------	---------------------

2.2.18. Could you tell me why do you think that?

2.2.19. Support to IT skills	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
------------------------------	---------------------------	---------------------------	--	----------------	---------------------

2.2.20. Could you tell me why do you think that?

2.2.21. User education	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
------------------------	------------------------------	------------------------------	--	----------------	------------------------

2.2.22. Could you tell me why do you think that?

2.2.23. Development of information skills	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
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2.2.24. Could you tell me why do you think that?

2.3. I would like to go on having your opinion on which of these roles are more and less important as far as education is concerned in the public library service. Could you please choose from the following list which are, in your opinion, the three most important and which are the three less important roles.

- 1. ....
- 2. ....
- 3. ....
- 10. ....
- 11. ....
- 12. ....

2.4. Could you please explain why you think those are the more important and the less important?

2.5. The literature suggests four broad areas of service of public libraries: information, education, culture and leisure. Could you please make a list, ordering them according to the importance you attribute to each one of them?

2.6. Could you tell me why do you think that?

### 3. CASES AND CONTEXTS

*After this first phase, in which we have, in general terms, dealt with the educational roles of public libraries, let us now discuss some more concrete aspects of the activity of this library in particular, relating it with the general local and national context in which it operates.*

3.1. Could you tell me what are in your opinion the strong points of your library in the provision of services related to the educational roles we have been discussing?

#### PROMPTS

- A) *Co-operation with schools*
- B) *Co-operation with other libraries*
- C) *Motivation of staff*
- D) *Creativity*

3.2. How would you describe the relationship of this library with the Education Services of the municipality?

3.3. Does the library co-operate with other educational bodies outside the Municipality?

3.4. If the answer is yes could you give some examples?

3.5. Does that co-operation work well or not? Please elaborate.

---

3.6. What do you consider to be your major weaknesses in the fulfilment of the library's educational roles?

#### PROMPTS

- A) *Space*
- B) *Library materials*
- C) *Staff / Quantity, training*
- D) *Poor marketing*

3.7. What are in opinion the reasons of these weaknesses?

3.8. What should be done to overcome them?

---

3.9. What are, if any, in your opinion, the new opportunities brought to the development of this library as a result of the development of its educational roles?

PROMPTS

- A) *More users*
- B) *Better use of the existing resources*
- C) *Attract new financing*
- D) *Improve the image of the library in the general public*

3.10. What are, in your opinion, the practical managerial implications of implementing the services we have been discussing?

PROMPTS

- A) *Increase of the political visibility and attention*
- B) *Need more resources*
- C) *More autonomy*
- D) *Greater organisational decentralization*

---

3.11. What are in your opinion the main constraints and threats that this public library faces or may face in the fulfilment of its educational roles.

## PROMPTS

- A) *Lack of political and social awareness*
- B) *Lack of autonomy*
- C) *Financial constraints*
- D) *Organisation*

3.12. What do you think should be done in order that the libraries are able to face and overcome these constraints and threats?

3.13. What is your vision of the future of these services in this library in ten years time?

3.14. Up to what point do you think that the situation that you described regarding this library (in terms of strengths, weaknesses, opportunities and threats) applies to the whole of the country?

3.15. What is your vision of the future of these services, in general terms, throughout our country in ten years time?

## 4. IDENTIFICATION

In order that I can compare this research with others done in the past, I would need some data regarding your identification.

Male / Female                      Age: Under 30 years ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60 or over ☐

Academic or professional qualifications .....

Post in the Municipality.....

Years in present post .....

Political party (Not valid for interview with professionals) .....

## 5. CONCLUSION



5.1. Just before we finish could tell me if you can identify in your background some reasons or elements that have shaped your ideas and opinions on the matters we have been discussing?

*PROMPTS*

A) *Kind and level of education*

B) *Professional experience*

5.2. Do you think there is something that you consider important that I didn't cover in the interview?

5.3. If this is the case, would you like to speak about it?

5.4. Would you like to have further information about the progress of this research?

Once again, thank you very much for your co-operation. I understand you are a busy person and it was very kind of you spending some of your time answering my questions. Be assured that you were most helpful for my research and that it has been a great pleasure talking to you.

SCALE FOR QUESTION 2.3.

XXXXXXXXXXXXXXXXXXXXXXXXXXXX	1 Not at all important	2 Of little importance	3 Neither important nor unimportant	4 Important	5 Very important
------------------------------	------------------------------	------------------------------	--	----------------	------------------------

LIST FOR QUESTION 2.3.

- Study rooms and homework centres
- Support to University Students
- Formal educational services
- Libraries for children and young people
- Facilities for the socialisation of youngsters
- Development of information skills
- Support to independent learning
- Support for IT skills
- Support for literacy
- Support to lifelong learning
- User education
- Support to schools mainly via School Library Service

## **LIST OF MUNICIPALITIES PARTICIPATING IN THIS RESEARCH**

- Abrantes
- Arganil
- Beja
- Guimarães
- Lagoa
- Lousã
- Leiria
- Oliveira de Frades
- Palmela
- Penafiel
- Ponte de Lima
- Porto de Mós
- Seixal
- Vendas Novas
- Vila Nova de Famalicão

### **In the pilot study**

- Almeirim
- Montijo
- Oeiras