



Guidelines for Australian Special Libraries

Purpose

These guidelines support the operations of special libraries, information services or corporate research units and their respective staff. They recognise the changing landscape for special libraries and the opportunities and challenges presented by digital content, delivery platforms and communications.

They are designed to inform senior management about the role and value of special libraries, provide library managers with a benchmark, and guide staff in the delivery of programs and services.

They stand alongside related Australian Library and Information Association (ALIA) guidelines, for example those developed by Health Libraries Australia.

Introduction

Special libraries provide a client-focused and increasingly diverse information service. They develop and curate physical and digital libraries, working alongside Information Technology (IT) departments – where IT is the platform and information is the content that flows through it.¹ They act as information hubs within organisations, not only providing their own collections but also directing people to sources held in other repositories.

Special library staff mobilise and manage data, information and knowledge in various formats for clients, while maximising its value and access. They produce and package analysis and evidence such as reports, infographics, bibliographies and other materials, creating decision-ready information that supports the goals and business of the organisation.

Special libraries provide value-added services such as:

- Enabling efficient access to a repository of print and/or digital information resources based on a deep understanding of business requirements and user needs. A repository will not only contain the latest published content, but also the unpublished reports, surveys, presentations, papers, images, contemporary and historical content which contribute to the valuable intellectual property of the organisation.

¹ <https://read.alia.org.au/unique-role-and-value-information-professionals-special-libraries>



- Training and assisting clients to effectively access credible and authoritative information and use relevant technology. Support for information literacy, digital literacy and high end research skills has been a growth element of the library service.
- Gathering and packaging evidence to support decision-making and organisational learning. Special library services underpin an organisation's approach to due diligence.
- Current awareness of trends, technologies and best practice in information, data and knowledge management on a national and international scale. Individual library and information services are generally part of wider networks of information professionals, which facilitate interlibrary lending, sector awareness and knowledge exchange.
- Competitive intelligence, marketing and market research for business development. With adequate time and resources, skilled staff are able to anticipate information requests, set up e-alerts and advise executives about advances in their field which can help give the organisation the leading edge.
- Knowledge brokering, connecting users to information sources and people both within and outside the organisation.
- Managing subscription databases, negotiating licences, dealing with complex eresource contracts to secure the best price for the organisation, while ensuring long term or perpetual access to essential information.
- Promoting copyright compliance, to avoid costly errors as executives navigate the application of old laws to new media.
- Providing services specific to the organisation, for example fact-checking speeches; intranet content development; project management, including contributions to IT projects; archives, records and knowledge management; extended reference services; current awareness alerts and "embedded" librarians, working as part of a team outside the traditional library space.

Information and data are essential for due diligence, evidence, innovation, competitive advantage and organisational learning, and special libraries play an important role in organisations working in the information and knowledge age.

Special libraries save the organisation money evidenced by the Return on Investment study commissioned by ALIA that conservatively estimates that for every \$1 invested, special libraries returned a value of \$5.43 (SGS Economics and Planning, 2014) ².

The expectation is that an organisation would recognise the value of its library; provide appropriate resourcing, and refer to the library and information service in its strategic planning and reporting publications.

² Howard, K. (2017). *The unique role and value of information professionals in special libraries*. Deakin, ACT: Australian Library and Information Association.



1. Management

1.1 Role/Status

Guideline: The library should be regarded as a service unit or department within the organisation. Management of the library is the responsibility of a qualified librarian or information professional with eligibility for ALIA Associate membership. The library manager should be pro-active and responsible to clients and to senior management. They should be consulted on all decisions which have an impact on the operations, financing and resourcing of the library. The library collaborates with other information content providers within and outside the organisation, for example a knowledge management unit to disseminate corporate intelligence, or recordkeeping and archives to optimise the preservation of print and digital information.

1.2 Operations

Guideline: The library manager should be responsible for the provision of all management and professional functions of the library. The library manager and all other library staff should have job descriptions and classifications in accordance with ALIA guidelines. There will be other factors depending on the organisation, for example, in government there will also be the Australian Public Service (APS) classification structure and capability framework.

The management of a library comprises people, strategic awareness, governance, processes and technology. It includes the development, implementation and maintenance of policies and procedures achieved through:

- client service
- standardised procedures
- staff training, development and performance management
- communication, collaboration or coordination and teamwork
- management of financial, human, information and communication technology resources
- resource management
- strategic planning and continuous innovation based on user feedback
- marketing and communications
- risk management
- disaster preparedness.

1.3 Communication

Guideline: The library manager should pro-actively liaise with senior management and key stakeholders throughout the organisation to ensure the library understands business requirements and client needs and provides a relevant information service. The library should identify advocates for the service and solicit feedback on a regular basis to ensure relevancy.



1.4 Performance measurement

Guideline: Performance indicators and measurements should be developed, evaluated, reported and revised annually to improve the quality of the service provided. Gathering statistics and generating user behaviour metrics can help assess the accessibility of resources and the utilisation of subscription content. Frequent after-action reviews can provide insight into opportunities for improvements. Both quantitative and qualitative information can be used for performance measurement.

2. Staffing

2.1 Duties and qualifications

Guideline: The library should be managed by a qualified information professional and additional staff may consist of librarians, library technicians and assistants. Full details of the duties and qualifications required by personnel undertaking librarian, library technician and library assistant positions are available from ALIA, together with skill audits and competency checklists relating to special library roles. Position descriptions need to consider emerging needs and skills, this could include specialists in data visualisation, with expertise in IT and graphic design.

Appropriate salaries for these positions should be determined using the ALIA salary scales as a minimum; reflect the qualifications, experience, responsibility and accountability of staff; be set with reference to other professionals employed by the organisation, and be reviewed on an annual basis.

The library manager should be responsible for the employment of library staff as required in consultation with management and human resources personnel.

Where it is a one-person library or with very few staff, the organisation should recognise the:

- additional challenges for staff working in professional isolation
- support required for learning and professional development
- need for all-round abilities in resource management, procurement, budgeting, marketing, working with new technologies
- limited opportunities for ongoing learning
- location within a much bigger department with expertise in a different discipline such as IT or corporate services.

2.2 Professional development

Guideline: Continuing professional development is essential for library staff to ensure the provision and management of an effective information service. The library manager and all eligible library



staff should participate in the ALIA Professional Development Scheme to maintain a high level of competency and currency, both in service management and service delivery. Employers have an obligation to encourage and facilitate the participation of their employees in activities provided by ALIA and its local Groups conducive to networking with their professional peers and engaging in continuous professional learning. Involvement in professional events is encouraged.

In addition, employers should encourage and facilitate participation in professional development outside the core library and information science skills, for example knowledge management, IT systems and platforms, information architecture.

3. Finance

Guideline: The library manager should be responsible for the financial management of the library which should include the following procedures:

- development and implementation of library strategic plans within the budgeting framework
- preparation of budget estimates for the fiscal year
- compliance with internal guidelines for example APS rules, Public Governance Performance and Accountability Act (2013), organisational procurement and content management policies
- approval of the budget by the organisation
- responsibility for the management of expenditure.

Budgetary items may include:

- books and journal titles
- salaries
- operational costs
- IT devices and other library equipment
- subscriptions
- acquisitions
- training and professional development
- capital items.

4. Resources

4. 1 Collections policy and resource management

Guideline: The library manager should formulate and review the policy annually to identify core information resources and services, both physical and electronic, to be acquired and managed for the organisation. The library manager should also provide guidelines for the selection, acquisition and disposal of information resources, and the relationship with the organisation's archives and records management should be recognised.



4.2 Resource access

Guideline: To facilitate efficient access to information, resources should be described and/or indexed, classified and arranged according to recognised standards using an appropriate online library management system. Staff should also be pro-active in supplying timely, relevant information to library users as alerts.

Resources should be provided in a format (print, AV and electronic) that best meets the information needs of the organisation and provides the greatest access, aiming for 24/7.

Library staff will negotiate agreements with content suppliers which provide the best access arrangements for their users, within the terms of the licence and copyright legislation.

The library will be a physical and/or online space. As a virtual presence, it may stand alone as an independent website or be part of the organisation's intranet.

5. Services

5.1 General

Guideline: The library manager should establish, maintain and regularly refresh a range of quality and relevant services in alignment with the objectives of the organisation using appropriate and current technology. The library staff should curate content and provide accurate, topical and contextualised information efficiently and pro-actively.

5.2 Information provision

Guideline: In consultation with the client, library staff should efficiently and effectively utilise all available and relevant internal and third-party information resources and search skills to provide quality information. (The phenomenon of fake news has made library and information professionals' ability to find the right information, from both published and unpublished sources, all the more essential to their organisations.)

The library manager is responsible for evaluating, assessing and providing the most appropriate methods of information dissemination to meet clients' information needs. Regular user feedback is recommended to identify and fulfil user needs. Library staff also need to anticipate demand by being aware of emerging trends, organisational strategic priorities and singular events.

5.3 Technology

Guideline: The library must facilitate client access to information from anywhere, using different software and hardware solutions. Secure IT platforms, access to devices and high speed internet



access are necessary requirements for ease of access to information. A strong partnership with the organisation's IT department will often be necessary and relations with industry partners (vendors) are also important.



5.4 Training

Guideline: Library and information professionals should provide training for clients to build their information skills. This training will enable library users, for example, to carry out their own literature searches, go beyond the first page of search engine results, interrogate specialist databases. Library clients should receive guidance and advice about their obligations to comply with licence agreements, freedom of information, privacy, data and copyright legislation in the various Australian jurisdictions.

5.5 Resource sharing

Guideline: The library manager should develop and participate in co-operative networks to optimise document delivery and facilitate resource sharing. Wherever possible, consortia arrangements that provide benefits to the organisation should be negotiated. The library manager should always be aware of information that is confidential or has a competitive advantage and, act to protect this information within accepted professional and ethical codes of conduct.

5.6 Marketing

Guideline: The library's marketing and communications strategy should include library users and senior management as distinct target audiences. The library should inform clients of the benefits, resources and services offered, as well as promoting added value content related to the business needs. The library should remind senior management on a regular basis of the library's contribution to the organisation's overall performance.

The marketing strategy should include close engagement with other departments and be aimed at demonstrating and increasing awareness of the value of the library to the organisation. The library should consider its branding within the organisation and how social media can be leveraged to alert clients to new data sources and trends.

5.7 Impact

Guideline: The outcomes from a dynamic and efficient library service should be a knowledge-rich organisation, with a free-flow of information, evidence-based policy and informed decision-making.



6. Work environment

6.1 Planning of location and access

Guideline: The library manager should work with the organisation's relevant stakeholders on the planning and maintenance of library facilities in compliance with the appropriate Australian Standards. The library's location – physical or virtual – should offer convenient access for all staff and clients.

In the physical space, for example, entrance and exit points should not be blocked by equipment or furniture which may impede emergency access. In the virtual space, staff access to devices and individual authentication methods should be considered. Website accessibility for people with a print disability should be factored into the design.

Due consideration should also be given to the security of both personnel and resources. In the online space, this could involve cybersafety advice or training for library users and embedding digital rights management as copyright protection for digital media.

6.2 Space requirements

Guideline: Physical and online space allowance should consider the library's requirements and comply with relevant Australian Standards.

The organisation's initial choice of the physical site for a library should allow for reasonable expansion and the ongoing floor space allocation should allow for the following library functions:

- staff work-space
- shelving and storage (allowing for an off-site alternative)
- service and client activities.

It should also be recognised that “embedded” or “mobile” librarians employed by the organisation in positions outside the traditional library, may not need the physical space but will rely on a web-based presence. Online space considerations should include the:

- digital storage capacity requirements of the organisation over the next 5-10 years
- advantages and disadvantages of onsite versus cloud storage
- increased focus on data as an asset; data sharing and open government; data interoperability
- digitisation of original content unique to the organisation and migration to new formats over time
- any requirement for a digital repository
- relationship with the organisation's archives and records management



6.3 Occupational health and safety

Guideline: The special library's environment should comply with occupational health and safety legislation and relevant Australian Standards.

For example, some environmental factors to be considered are:

- acoustics - the library should be free from excessive noise and vibration
- lighting - adequate lighting levels should be provided in accordance with Australian Standards.
- power - special attention should be paid to the appropriate placement of outlets for technology
- other conditions - adequate ventilation, temperature and humidity control, dust and pest control should be provided for the preservation of library resources, maintenance of technology and comfort of staff and clients.

Floor loading should comply with Australian Standards. Attention should be paid to the building's structural allowances with regard to placement and loading of stacks. Storage and shelving should be conveniently located.

Where storage facilities on site are less than optimal, off-site storage should be considered.



Glossary

For the purposes of these guidelines, the following definitions are applied:

Collection is the resources obtained and provided by the library to achieve the information needs and objectives of the organisation.

Professional development relates to activities and training to keep staff informed on current developments in librarianship, information management and technology, and in their subject specialty to strengthen their technical and professional knowledge, skills and competencies.

Resources are information sources in the form of physical items or digital content, either held locally or accessed from offsite storage or remote websites.

Special libraries are libraries which provide specialised services; serve a particular clientele; or have special collections. They belong within a specific organisation and serve the staff and clients of that organisation.

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