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ABSTRACT

Linda L. Melroy Recommendations For a Policy
 Regarding Online Searching at the
 Cape May County Library. 1996
 Thesis Advisor: Regina Pauly,
 Graduate Program: School and Public
 Librarianship.

The purpose of this thesis is to ascertain and compare the methods used by other New Jersey public libraries in order to best serve their patrons needs in a technological society. The libraries of today, including Cape May County Public Library, are facing the challenge of providing online services to an ever more sophisticated clientele. At the same time, the funds for these services may be difficult to obtain.

A questionnaire was sent to fifteen New Jersey public libraries, twelve of whom responded. Questions involving the type of online searching being done at their institution were raised. Also questioned were the costs involved in these searches and the amount of patron involvement needed in both cost recovery and search strategies. Also studied was the type of magazine services available and the cost of such services to the patrons.

According to the statistics gathered, patrons are an integral part of search procedures. Patrons are interviewed or required to be present for the search. In some libraries

request-for-search forms are used as a management tool for online searches. Sixty per cent of the libraries surveyed pass at least some of the cost of searching on to their patrons. The most popular online sources involve the subject areas of business, health and current events.

Based on information obtained, the following recommendation was made as far as policy at the Cape May County Public Library. Each patron that desires to obtain information via online services will be asked to fill out a request-for-search form as is illustrated in chapter four of this work. This form has been designed with the conclusions of the questionnaire as a basis for the information.

MINI ABSTRACT

Linda L. Melroy Recommendations For a Policy Regarding
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Libraries of today are facing the dual challenge of providing an ever more sophisticated clientele with ever decreasing funds. Therefore, in the desire to improve library services, a survey of twelve New Jersey public libraries was undertaken. The data compiled from this study was analyzed and the following recommendations is made. It is recommended that Cape May County Public Library implement the use of a request-for-search form as an online searching management tool.

ACKNOWLEDGEMENTS

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The writer would also like to thank the following libraries for responding to the survey which was the basis of this study:

Atlantic County Library
40 Farragut Avenue
Mays Landing, NJ 08330

Burlington County Library
5 Pioneer Boulevard
Westhampton, NJ 08060

Camden County Library
203 Laurel Road
Voorhees, NJ 08043

East Orange Public Library
21 South Arlington Avenue
East Orange, NJ 07018

Gloucester County Library
389 Wolfert Station Road
Mullica Hill, NJ 08062

Mercer County Library
Lawrence Headquarters
2651 Brunswick Pike
Lawrenceville, NJ 08648

Monmouth County Library-Eastern Branch
125 Symmes Road
Manalapan, NJ 07726

Newark Public Library
5 Washington Street
Newark, NJ 07101-0630

Ocean County Library
1010 Washington Street
Toms River, NJ 08753

Sussex County Library
125 Morris Turnpike
Newton, NJ 07860

Woodbridge Public Library
George Frederick Plaza
Woodbridge, NJ 07095

Anonymous

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CHAPTER ONE

Point in Question

Introduction

The library services of today vary greatly from those of the past. Information is no longer preserved only in the print form such as in books and periodicals. The information of today is dynamic. Facts and ideas are changing at a rapid pace and these ideas are now frequently captured and maintained on such media as electronic journals, online databases and CD-ROMs. Some data is available only in these forms. Historically, the most current information in a field is available in journals since they are usually published on a monthly basis. Through the use of Boolean searching, data that may be almost impossible to obtain from a book can be easily found by an online or CD-ROM search. These factors make it essential for the libraries of today to offer such services to their patrons.

The contemporary library clientele is also much different. Society as a whole is much more knowledgeable about the availability of information. As an outcome of this availability, patrons are then more demanding of the collection provided. Though a library offering a diversity of information resources is a goal one should strive for, there are then some important questions that must be dealt

with as far as managing reference resources which tend to be in constant flux, such as online searching and serials formatting.

1. How much time and money should be spent, per person, on database searching?
2. Should the patron be made aware of the cost of this search?
3. Should the patron be held accountable for the fees that arise from a search? If yes, to what extent?
4. Does the patron really need this expensive source of information? It is merely curiosity or will the money spent be justified?
5. Will an in-house source of information answer the patron's question?
6. What online services will best meet the needs of the patron?

As noted in the American Library Association (ALA) Policy Manual:

The American Library Association asserts that the charging of fees for information services, including those services utilizing the latest information technology, is discriminating in publicly supported institutions providing library and information services. (Giacoma 2)

The New Jersey Library Association supports this national

viewpoint. New Jersey State Statutes NJ40:33-1, NJ40:54-1 and NJ40:54-35 (Appendix A) issue state-based policies for fees in libraries. Despite these policies, most library staff members are aware that fees of some type are levied on services in most public libraries. User fees are financial tools that are used in libraries for a variety of reasons and on a variety of services. Because the reference materials and equipment that are used to support online services are much more varied than when simply books are involved, establishing a cost recovery policy is becoming a more complicated procedure for library administrators.

Purpose Of The Study

This study focuses on services in the Cape May County Public Library reference department that have the most variation and/or the most expense involved in their usage. Serials and online services are two of the services that are evolving at a rapid pace. Fees for these services are also in constant flux. A way of efficiently managing these services is needed. Therefore the questions posed are: Given the extensive variation in the manner in which magazine articles can be obtained, and given the multitude of vendor services available for online searching, how can one choose the best method of usage for the Cape May County Library? Cost and convenience are key factors to examine

when adopting a policy. The needs of the patrons must also be taken into account.

The answers to the questions posed are not black and white. There is a middle ground where patron needs are met with serious consideration given to cost and convenience. The final analysis may not please everyone, but it will be a compromise that best blends all factors.

Procedure

Surveying libraries that are similar to Cape May County Library produces results that can be analyzed. The survey includes such topics as vendor choice and expense recovery. Using county libraries is a way of limiting the variation of philosophy and patron type. In academic or professional libraries, the mission statement differs from a public library due to the fact that library styles vary in relation to the needs of the primary users. It then follows that the choice of services is influenced by the type of information that needs to be found. The goal is to study empirical data gathered from methods used at other public libraries. The questionnaire is designed with the heads of the reference departments in county libraries in mind. These librarians, because of their similar position, are most likely to be similar to the philosophical views of Cape May County personnel. A closed questioning technique will be used

which will involve the use of multiple choice answers to given questions. This should make it easier for the librarians to understand the rationale behind the survey. It will also control, to some degree, the answers that are given, there is also a section available for spontaneous answers and comments. This gives added insight to the study. Questions asked cover areas such as:

1. What type of database services are available for use at the library in question?
2. Who is allowed to access these services? Is the public allowed access or is the service mediated by the staff?
3. Are you happy with your arrangement?
4. Given a choice would you change you services?
How?
5. If fees are collected, what type of billing is used?
6. How frequently are searches done in your library?
7. Which databases are used most frequently?
8. What type of magazine service is available?
9. If magazine services include a cost to the public, is that cost recovered? How?

Sending a follow-up letter one month later to those who were not able to respond in the allotted time will increase participation in the survey.

Once the information is gathered from participating libraries, there will be an interview arranged with several administrators of the Cape May County Public Library at which time a discussion of management of reference services will occur in order to ascertain whether the data from the survey might precipitate positive changes at the Cape May County Library.

Studying the literature, pertaining to the subject, is an important step. This will give added insight into the positive and negative aspects of change regarding reference services or management styles. Facts found in the literature search will be included in the discussion with the administrative staff.

Conclusion

The continuous evolution of electronic reference sources, makes for difficulty in the management of these services. Therefore studying the best methods of managing users fees will prove helpful in setting policy. A study of types of information patrons might need and what are the best resources available to fit these needs will also shed insight. The empirical data derived from the survey in question and used in conjunction with information found in the literature, will all be taken into consideration in order to suggest improvements in current references

services. The ideas of using fees as a tool to manage abuse of resources and choosing the best resources available will be a goal to strive for that will meet the needs of the public and the capabilities of the staff.

CHAPTER TWO

Review of the Literature

Russell Shank, Chairman of the ALA task force to study the crisis in library education has quoted Jesse Shera by advocating:

As I see it, the great need of the library profession today is to formulate a professional philosophy that will meet the rapidly changing needs of society for recorded knowledge. We must redefine our role in society, emphasizing new functions and services that will make of the library the agency it should be in the total communications process. Such a reassessment relates to every aspect of library services from those directed to the preschool child to those assigned primarily for the scientist and scholar. (Rettig 77)

In the book Rethinking Reference in the Academic Library, Rettig suggests that there is much discussion as to the fact that the influx of technological advances has changed the attitudes of the library patrons. There is a need to redefine reference services. The needs of individual users should be foremost in the minds of a contemporary reference department (81). More and more

information services are becoming available for accessing information. The complexity of these services is also increasing, and as it does, the need for assisting a patron is becoming more of a necessity if a search is to be successful.

One of the functions of a good reference librarian involves effectively handling the increasing demands of helping an individual articulate and refine his search. Patrons are often not familiar with which online services are easiest to use. Nor do they know which services emphasize the specific subject area that they wish to access. Each service has its own particular set of rules that needs to be learned. Librarians must be trained on a particular service if they want to be able to perform an effective search (Appendix B).

Online searching services can quickly become very expensive. Consequently, even though staff training itself is expensive in the context of man hours involved, it is still an essential element if an effective search is to be performed. The information seekers themselves will have difficulty achieving access to the power and range of the new abundance of electronic information. Three of the major problems the information seekers will face are lack of computer skills, lack of physical access to equipment and cost of accessing the equipment (American Library

Association 46-47). The Commission of Freedom and Equality of Access to information ALA advocates that:

Public libraries should be prepared to assist clients who need to have access to electronically delivered information but lack the skill to exercise it. This is an important recommendation, which will require added or improved staff resources, and computer facilities in most libraries.

Cost

Also the ALA Commission of Freedom and Equality of Access to Information states that "adopting policies related to access to electronic resources should attempt to define access to connections as well as collections" (American Library Association 50). The number of terminals available is a limiting factor as well as the cost of each minute of connect time. Nevertheless, the ALA stand is asserted to be that "the central role of the system of publicly supported libraries in the United States is as a principal social vehicle to make possible effective citizen participation in a democratic society" (American Library Association 93). This principal should be followed regardless of the costs of these services. The library will now be a clearinghouse of services which will include such services as a community resource center and a communication center. These

clearinghouse formats will be used to mediate the information needs of the community which involve the ever complex access to the onslaught of information. The Commission states in Freedom and Equality of Access to Information: A Report to the American Library Association that "user fees are often imposed by libraries . . . as the . . . means to finance . . . operating costs of this new technology. ALA has pointed out . . . this may constitute a significant barrier to access." (American Library Association 50). New Jersey Statutes Annotated Title 40 Municipal and Counties 40:48 to 40:55C also addresses the issue of fees in public libraries. The legal stand endorsed by these statutes is that " . . . every county shall . . . establish a free library . . . "

Despite protestations of organized legal and professional groups associated with library services, the charging of fees in public libraries has become a frequent practice. Giacomo elaborates on this point with discussion about fees used as management tools or as sources of revenue raising. He comments on the point that "fees are attractive to administrators who wish to implement new services and to better secure the funding of existing services . . . but not increase taxes" (17-25). Charles Robinson simplifies the fee or free controversy in his article The Fee or Free Decision when he states that "we see that the fee or free

controversy only exists in library-land and not in the real world, and only in the minds of those public librarians who tend to think of the task of running public libraries in ideological rather than pragmatic terms" (113). Later in the discussion Robinson makes the following comments:

There are no real alternatives toward passing on some online charges, if not all of them, to the public. The only thing that has saved us from facing this issue squarely is the fact that the public so far has made very little use of the online services in public libraries anywhere in the country.

Policy Writing

Reasons that libraries have not implemented policies are numerous-both expressed and unexpressed (Katz xxx-xxxi). Staff members might say that policymaking is too time consuming and costly. Policies tend to become outdated quickly and do not cover all problems that arise. It is not always possible to write a policy that is precise and unambiguous. And human nature being what it is one can continue this list of excuses.

However, the general attitude of those who would not implement a policy can be summarized by a spokesperson for the University of Western Ontario. He comments:

I am personally opposed to lengthy and detailed policy

statement and or procedural manuals for reference services. There might well be a tendency for some staff to regard the statement as prescriptive. This would destroy . . . judgements which are so important in our line of work. (Katz xxxi)

Or a protestation against formal policywriting from a letter penned from Huston Public Library in which a spokesperson states:

We have not developed a written policy because we would not wish to place a limit on what our reference staff might wish to do in serving the patron. Our philosophy generally, in regard to public service, is to make every effort to satisfy the information needs of the public we serve.

(Katz xxxi)

Despite the argument for lack of a policy, there is a strong need for policy making, especially in the everchanging and controversial areas of online searching.

Librarians now must deal with this very controversial issue. Should a library charge for online services? Are these new searching tools to be considered just another information tool or should they be treated in separate way?

It must be considered important for a reference department to formulate guidelines to aid in the management of the complex practical and philosophical questions that

arise in the modern technological area of searching. It is stated in Katz's publication that a written policy statement for online searching is a necessity. It is critical in the process of formulating procedures, setting priorities and providing continuity and consistency in a world of flux. Since goals and objectives should be a part of such a policy it will become an important management tool. The continuity provided will help new staff members become aware of their responsibilities.

A first step, therefore, in policymaking would be to define your goals. Do you have a mission statement that you would like to adhere to? "Information Services Policy Manual" begins its outline of an information services policy manual with a mission statement (165). Policymakers must be aware of the basic service goals, philosophy and ethics that are unique to their particular situation when deciding on the function of their mission statement. Another point that must be taken into consideration is the makeup of the library clientele. One must be aware of the population that is served by the institution in question. The library should emphasize the fact that they must meet the needs of all the people who rely on their services. As philosophized in Article 5 of the Library Bill of Rights "A person's right to use the library should not be denied or abridged because of origin, age, background or views" (Giacoma 14).

There are varying options of reference services that should be defined in a reference policy ("Information Services" 165). Each of these options must be addressed if the statement goals are to be formulated. In order to treat all patrons as fairly as possible time limits may need to be set on services that have limited terminal access. Patrons should be made aware that they may be asked to relinquish their terminal access if patron back-up becomes a problem. Other options that should be clarified include how instruction on using printed and electronic resources will be handled.

"Information Services" suggests some policy activities that are important to good service. The article states that a good policy statement will describe the types of electronic and user resources that are available. An effective policy should then go on to explain how fees will be charged for these online services. On page 168 of "Information Services" there is an enumeration of some of these services that may be subject to fees such as OPACs, CD-ROMs, online databases, internet resources. Charging fees for online services should not be considered an anomaly. Warner lists many 'traditional' services that have been offered for fees for a long time (7). Some of these services include interlibrary loan, document delivery and market research. For a listing of other services that

frequently have a fee for usage see Appendix C.

Selected Library Services That Should Be Managed

The Types of mediated reference services available should be made clear to the library user. These users should have a definite indication of what type of inquiries will be given what level of service. A time frame for answering reference questions is an important consideration. If inquiries must be referred to an outside regional reference service it is advisable to inform the patron that an answer may take days to be found. It is a good idea to ask a patron whether he will still need the information, even if it does take several days, so that funds will not be needlessly spent.

The Birmingham Alabama Public Library policy states its purpose to be a basis for setting procedures and establishing guidelines in those areas of online reference service which are unique from standard service due to the nature and cost of data base information retrieval" (Katz 428). It goes on to elaborate about the fact the one of the greatest differences between online reference service and traditional services is the fact that online services can become very costly and patrons may be required to assume some of the expense involved.

At Birmingham Library several factors influence the

definition of online reference service. Fees charged for services are influenced by such variables as how a company charges for search that is performed. Cost of staff salaries and cost of telecommunication charges are also part of the expenses incurred.

When library users are informed of the fees that they may incur, they should also be made aware of the scope of the library's online reference service (Katz 429). There should be a preliminary interview in which the patron meets with a search specialist and discusses the search of the subject at hand. Points that should be covered include: What will the cost difference be between traditional and online service? What type of information will be found online that would be superior for the patron as compared to traditional reference services? When the citations are found can they be made available or will obtaining the articles cited become difficult? The patron must also be made aware that there may be a cost for searching specific databases and ultimately, the possibility exists that no information will be obtained to answer the query.

A definition of "ready reference" is an important addition to a reference policy. Many libraries do not charge for basic ready reference searches that are needed to provide simple factual information which is not available through traditional sources.

The objectives of online reference service must be formulated. In Katz's text, the Birmingham Public Library suggests that online services should be used when the printed index resources of the library are inadequate. The librarian performing the search will have the authority to initiate an online search, but there are some unique qualities to this type of search. Birmingham Library is aware of such qualities and in the interest of full and cost efficient services reference online reference service, the librarian/search analyst will undertake to explain all of the following search aspects to the patron:

- benefits and limitations
- appropriateness
- placing limitations and establishing maximum cost
- necessity of full discussion of the subject of the search
- search strategy and selection of the database
- confidentiality
- nature of the printout
- how cited material can be obtained
- priority level that be neither greater nor less than traditional reference service
- fully developed search strategy before going to the terminal
- recording and evaluating the service in order to

improve future searches.

Magazines

The previous discussion has centered on mediated online reference searches. Some examples of these might include Dun and Bradstreet business analysis or trademark searching via EPIC searching.

There is another venue of information that is also very important to the reference services of a library. That venue is the process of unmediated journal searching. A major aspect of this service is the process of selecting the actual journal format to be made available to the public. Management involvement is needed to analyze the pros and cons of each format.

Historically, journals have been used as a means of supplementing a library's core reference collection with current information. The original method of usage would include a few simple steps. A typical library would subscribe to hard copy editions of magazines. The selection of these magazines would be based on the needs of the library users. Hard copy issues were kept for as long as possible but retention was contingent upon adequate storage space. One problem was the high rate of loss of these resources due to theft and mishandling. The storage of magazines in the form of microfilm, microfiche and later

Information Access Company's (IAC) Magazine Collection alleviated the problem of magazine storage.

Now another option is becoming readily available. That option is the inception of electronic journals. According to Eric Jul in his article entitled "Electronic Publishing", the contention is that "there is confusion as to the exact definition of the phrase electronic journal." He attests that the basic meaning would be defined with such terminology as "a periodic publication of machine-readable files transmitted through a telecommunication link. This description has the essential components of periodicity, publication format and distribution media."

Robinson in "The Changing Status of Current Cites", discusses how the University of California at Berkeley became involved with Current Cites, their electronic journal. It is an interesting evolution. According to Robinson, the original program was designed "to establish a formal library program to develop and support a cadre of library technical experts" (21). At its inception in 1990, this publication functioned as a print newsletter which reviewed articles in approximately 30 journals. The members of the editorial staff of Current Cites began communicating through e-mail and this was the beginning of a metamorphosis. The means of distribution changed from print to electronic. In 1992, a librarian on the Internet asked for permission to

post Current Cites on the information network. Now this publication is available to over 6000 subscribers. One disadvantage that is mentioned in Robinson's article, however, is that electronic journals may or may not be archived. If this information is not archived there will be no access to the information in the future.

Jul in "Electronic Journals in a Print of Paper World", believes that cost of an electronic journal will be less than a print journal since articles from various publications can be blended into one journal. Dannelly's article touts the belief that economics is the main barrier to accessing electronic journals (669). There are many details to work out as to how the cost of these services will be paid for. A few of the options might include subscription to systems or payment for individual articles.

Advantages of Electronic Journals

One of the most exciting concepts of electronic journals is the concept of interactivity. Hypertext, which is simply seen on the screen as text in another color, transports the user from one site to the next. One can follow an endless path of information, using these links to other files (Hickey 529). Electronic mail provides a method of immediate communication. Users can give immediate feedback to the author of the information. Work can be

edited and created by whole groups of users. In comparison to print information, electronic information can be obtained with less expense and more speed. The availability is usually much greater. With users having access to home computers, the users access will be greatly improved (Hickey 531-532).

Disadvantages of Electronic Journals

Hickey continues the discussion by covering the disadvantages of online journals (532-533). It is stated that though disadvantages are disappearing, they still overwhelm the advantages that are obtained. Costs are still high, interfaces are still frustrating, equipment still tends to malfunction and users must still log on. As far as text, online journals are less permanent. Information can be quickly misplaced. The actual print of the article will most likely be of a lesser quality than the original print. Therefore, all these problems must be taken into consideration when discussing the feasibility of electronic journals as a viable format for information access.

FirstSearch Service

One of the premiere databases offered at the present time is the FirstSearch Service. As of 1994, there was a total of 165,454 LC MARC records for serials (OCLC To the

Next 5). This publication by the Online Computer Library Center, Inc. also goes on to elaborate on the fact that the FirstSearch Service will reduce the growing costs of serials for libraries as well as increasing the access for information seekers. Some of the factors stated that are essential to a good information system are timelines, completeness, scope, flexibility and accuracy.

(OCLC-Supporting) documents the experiences of Cleveland Public Library as it pioneers ways to provide its patrons with information. Robert T. Carterette, Jr., Automated Systems Manager, explains his philosophy in the following way:

The Age of Electronic Information is here. And providing patrons with a gateway to the growing amount of digital data is just as important as owning an item in the collection. In many cases, it's essential to adequately serving a patron's research and information needs. (1)

Cleveland Public Library has designated FirstSearch as the reference tool of choice as far as accessing magazine articles. The range of databases provided by this service is extensive. There are over 60 databases for an information seeker to access. These databases cover an extensive array of subject matter. Some subject areas covered include arts, business, education, engineering,

general reference, earth science, biology, medicine, law and social studies (OCLC-Supporting 3-5).

In the Cleveland pamphlet the point is brought to light that the purpose of FirstSearch is to supply the patron needs directly. At this institution forty-five percent of the patron requests are performed by dialing into the library. Mr. Carterette of Cleveland Public Library states that:

We're reaching a new class of patrons with FirstSearch-people who previously were not using library services. Now, they're using FirstSearch from their homes. They're still not coming into the library, but they're using the library through FirstSearch. (OCLC-Supporting 3-5)

There is a myriad of choices when it comes to means of supplying information in the technological age. In a time of budget constraint one must analyze the needs of the users. Then cost must be factored into the equation as well as other pertinent factors. FirstSearch may or may not be the answer for all libraries. Effective management strategies are essential if a library is going to be successful in organizing and implementing the search tools that will be most useful to the reference staff and the patrons that they must service.

CHAPTER THREE

The Survey

The purpose of this survey is to gather information pertaining to policies concerning online searching done for informational purposes at public libraries. In order to make recommendations that improve reference policies, empirical data was obtained by a survey that provided a solid foundation of facts. This questionnaire was sent to the Head of Reference in various public libraries (Appendixes D and E). Libraries were selected that would be most similar to the philosophy of Cape May County Public Library. These libraries were selected because of the role they fulfill as public libraries. Their patrons' demands, as with Cape May County Public, should be of a general nature. Academic and special topic libraries service a different clientele base. Therefore, I chose to send questionnaires to fifteen New Jersey libraries classified as public, most as county and municipal. Twelve libraries responded, three of whom had written policies that they sent to be analyzed along with the data obtained from the survey.

Table 1 shown the actual statistics of the libraries involved in the survey. As can be seen, even though most of these are county and municipal libraries, they are very diverse, just as is the state of New Jersey. The table

indicates two libraries that hold in excess of 1,000,000 volumes in their collection and one library with less than 50,000 volumes. The others fall into a wide range between these two extremes. When considering the population size that served by each library, there is also a large variation. One library did not respond to the question regarding population, three have a population under 100,000, four have a population between 100,000 and 300,000 and four libraries serve over 300,000 people.

Cape May County Public Library, the library that is under study, is a public library that serves the population of Cape May County, New Jersey. The 1990 census lists the population as 92,250. The circulation listed in The Official Directory of New Jersey Libraries and Media Centers 1993 is 354,000 and the number of volumes in the collection is 325,000.

Table 1
Library Statistics

Library Code	Volumes in Library	Population size Served	Library Type
Library A	780,000	390,000	Public County
Library B	400,000	74,000	Public
Library C	1,000,000	553,124	Public County
Library D	640,219	202,276 (Registered Patrons)	Public County
Library E	150,000	70,000	Public County
Library F	50,000	230,082	Public County
Library G	120,000	30,000 (Local) 100,000 (system-wide)	Public County
Library H	N/A	N/A	Public County
Library I	301,700	250,000	Public County
Library J	1,219,951	329,000	Public
Library K	397,140	95,000	Public
Library L	320,000	122,000	Public County

Table 2 and Table 3 clarify the questionnaire results that are meant to analyze variations of online policy. As can be seen in Table 2, libraries A, B, and C have written policy statements regarding online services. Four libraries F, G, K and L have no policy and libraries D, E, H I and J have informal policies of various kinds. Responses show that librarians involved in online searching are generally trained to become efficient in this task. The libraries also involved patrons to varying degrees. Patron input is important to a successful search. Therefore, some libraries request that patrons be present during a search while others want the patrons to fill out a request-for-search form so that pertinent information will be available as the search strategy is formulated.

Table 2
Status of Online Policy

Library Code	Formal	Informal	None
Library A	X		
Library B	X		
Library C	X		
Library D		X	
Library E		X	
Library F			X
Library G			X
Library H		X	
Library I		X	
Library J		X	
Library K			X
Library L			X

Table 3
Online Search Procedures

Library Code	Librarian Involvement	Patron Involvement
Library A	One Librarian trained, 2 or 3 others to be trained	Patron interview Patron should be present
Library B	All reference librarians Assigned informally	Patron should be present
Library C	All reference librarians	Patron needs appt. Patron must fill out "request for search"
Library D	Reference librarians trained in Dialog	Librarian decides best search method
Library E	All reference librarians	Librarian decides best search method
Library F	N/A Technical Services only	N/A
Library G	ILL librarian only	Librarian decides best search method
Library H	Some librarians	Patrons are questioned as to exact search
Library I	All full-time reference librarians on a rotating basis	Patrons may need an appointment, a "request for search" form and should be present
Library J	All reference librarians by subject area expertise	Patron needs appointments
Library K	Some librarians on a rotating basis by subject if complex	Patron must fill out "request for search"
Library L	N/A Reference backup only	N/A

Table 4 compiles the empirical data from the questionnaire that deals with the statistical analysis of online searching. There is a wide range as far as the amount of searching done by each library. Seventeen percent of the libraries do less than 10 online searches per month. Twenty-five percent do between 10 and 30 searches and forty-two percent find themselves doing more than 30 searches in a given month. Libraries F and L do not perform public searches. Their Online Computer Library Center (OCLC) services is for in-house use only. Library F uses OCLC for technical services use only while library L uses it for reference backup at the discretion of the librarian involved in the search procedure.

At the other end of the spectrum are Library I and Library J. Library I, which is a Region 6 Reference Center, handles 90 searches per month. This is a special case scenario since they are responsible for researching questions from the entire region. Library J is located in a heavily populated area which may account for the enormous 100 searches per month. The significance of this number of searches is reflected more in the cost rather than the time involved to perform these tasks.

Other aspects of search statistics shown in this table include information necessary to analyze cost recovery practices. Cost recovery, for the purpose of this study, is

defined simply as the fees for online time and does not include the myriad of other expenses that could be used in the definition. Expenses such as staff salary, cost for supplies and maintenance fees for equipment were not addressed in this study. Again the data shows a wide range of fee management style.

Twenty-five percent of the replies indicate a cost of more than \$10 is associated with an online search. Twenty-five percent indicate a cost of \$10 or less and seventeen percent report a variation spanning a range of \$10 to \$15 in the fees accrued. The remaining thirty-three percent do not use online facilities in this capacity and consequently did not respond to this query. Sixty-six percent of libraries surveyed pass at least some of the cost on to the patron. Seventeen percent absorb the searching cost into their budget. Online searching is not available in seventeen percent of the libraries surveyed.

Table 4
Comparison of Online
Search Statistics

Library Code	Number of Searches per Month	Cost per Search	Patron Fee
Library A	8	\$12	First \$7 are free, Patron pays balance
Library B	60	\$5-20	Some are free, some not
Library C	10	N/A	Searches are charged for
Library D	40-60	\$10-20	Free, but limited to \$20
Library E	20-30	\$10	Free
Library F	In-house only	N/A	N/A
Library G	6	Part of OCLC cost N/A	Free, Single searching only
Library H	30	Business \$6, Medline \$12-15, News \$8-16	Patrons are charged
Library I	90	\$6 Mostly D and B	Patrons are fully charged
Library J	100	\$40	Some searches are free, some not
Library K	65	\$8-10	First \$10 are free. Patron pays balance
Library L	In-house only	N/A	N/A

Table 5, on the following page, continues with the analysis of searching variations. By a study of this table, one can note that a large percentage of the libraries polled use online searching for business, medicine and current event research. Other areas such as science and the humanities do not fare as well. Law information appears to be an area that is not frequently searched for online. All libraries from the survey except Library A and Library D subscribe to the Online Computer Library Center (OCLC) database. Also DIALOG is heavily used. All libraries but Library F and Library G use this service. The EPIC database is used only by Library B, Library I and Library J. Library J also uses the services of databases NEXIS and DATATIMES. Frequently mentioned searching tools include Dun and Bradstreet, file number 516 of the DIALOG service, for business and Medline for medicine. Several other databases of choice mentioned are the Philadelphia Inquirer, Westlaw, National Technical Information Service (NTIS), Legal Resources Index, Abstracted Business Information (ABI/INFORM), and Library Information Science Abstracts (LISA).

Table 5

Frequency of Online Use Compared by Subject Area
and Indicated by Library Code

Subject Area	Searched Frequently	Searched Seldom	Searched Never
Business	A, B, C, D, E, H, I, J, K		
Medicine	A, B, D, E, H, J, K		
Law		E, H, J, K	A, B, I
Current Events	A, B, E, H, I, J	D, K	
Science	B, J	A, D, E, I, K	H
Humanities	J	A, B, D, E, I, K	H
Other	C (Education) D (Library Science)		

Magazine statistics are compiled in Table 6. According to the information extracted from this table sixty-seven percent of the libraries polled charge fees for printing magazine articles. Only seventeen percent indicate that there is no charge attached to this service. Seventeen percent did not respond to this question. In all cases noted, the in-house collections are subsidized by interlibrary loan. Thirty-four percent did not supply the information for this interlibrary loan query. Mostly, the responses from these libraries indicated that they did not keep statistics on this topic. Of the others, fifty percent subsidize in-house magazine sources with thirty or more interlibrary loan articles per month. Seventeen percent do under thirty interlibrary loans per month.

Hard-copy magazines are still the most common form of access, according to Table 6. Of the responding libraries fifty-eight percent subscribe to more than 500 hard copy journals. Library J listed an extensive choice of 2700 subscriptions. Forty-two percent then, have less than 500. The microfilm/fiche information is much too varied to form any conclusions. It is a popular format and used by most of the libraries surveyed. Thirty percent of the respondents indicated that they also use an online format to obtain magazine articles.

Table 6
Magazine Statistics

Library Code	Magazine Format and Subscription Numbers	Cost per Page	Monthly ILL to Subsidize in-house magazines
Library A	Hard Copy - 400+ Film/Fiche (archive) Proquest	.15 .25 .20	30
Library B	Hard Copy - 800 Film/Fiche - 500 Online services	No Charge	5-10
Library C	Hard Copy - 700 Film/Fiche - 750 IAC-IAC Online	.10	30
Library D	Hard Copy - 800 Film/Fiche - 2	.15	52
Library E	Hard Copy - 568 Film/Fiche - 2	.15	8
Library F	Hard Copy - 204 Film/Fiche - 286	.15	N/A
Library G	Hard Copy - 315 Film/fiche - 500	.10	35
Library H	Total - 540	.15 IAC-Free	Frequently especially medical
Library I	Hard Copy - 458 Film/Fiche - 270	No Charge	N/A
Library J	Total - 2700	.10	N/A

Several other forms of reference tools were surveyed out of a desire to see what other services were used to provide essential reference information. CD-ROM's are frequently used but the information obtained from this part of the questionnaire was quite varied. All libraries surveyed use CD-ROM's to some extent. Library F indicated a limited access to online information but led the group in CD-ROM variety.

Their responses listed nineteen CD-ROM sources including sources in health, business, literature, careers, science and current events. Generally, the most common CD-ROM topic is business. Nine of the twelve libraries indicated some sort of business CD-ROM. Three respondents listed health sources. Other responses are too diverse to list here.

The most contemporary reference tool, the Internet, is used by fifty percent of the responding libraries as a source of information. Twenty-five percent have some access to Internet and twenty-five percent do not use this source as an information tool. My main concern with the Internet was how many libraries were experimenting with the usage of this source as a reference tool and not to what extent since it is such a new tool that libraries are still in the beginning stages as to the efficiency of this source.

CHAPTER FOUR

Analysis and Conclusions

Upon review of the literature in the field one is awed by the changing face of librarianship in the world of library automation. Of course, the fundamental mission of a library is still to provide access to the print material available on-site. However, the format of that printed material has changed. The format of choice is changing. Patrons now want access to the most current information in the field.

Libraries have always provided access to information and materials needed/desired by their users; access has been the very definition of a good library for the last fifty years or more. Historically access has been viewed primarily as providing access to materials in the local library's collection. But the meaning of access is broadening to mean access to all library collections and electronic information resources worldwide. (Bierman 71)

In the results of the survey performed in this study, one can see that the statement quoted above is truly happening. Of the twelve libraries queried, seventy-five percent frequently use online searches to provide business information. Medical information and current events are

also other subject fields that are frequently searched online.

These three fields do have at least one common denominator. Information in the fields of business, medicine and current events is in a state of constant flux. What is true today may not be true tomorrow. Leaders of countries are assassinated or reelected or simply thrown out of office. Stock markets can become a roller coaster ride and medical theories are constantly being challenged. Library patrons know that this information can be accessed and believe that they have a right to obtain such information at their local public library.

Since patrons expect to have access in these subject areas, a library should provide this access. As alluded to, the current trend is to move from an emphasis on collection development to an emphasis on access. The traditional library materials budget is now becoming an access budget. However, some management tools must be formulated in order to methodically practice cost containment.

Controllability of cost seems to be a prime point in determining if an access fee will be charged. With media such as CD-ROM and locally mounted databases the cost of access is fixed. The cost is independent of the usage. Unlimited usage has no influence on the library budget. However, online searching is variable. There can be no

fixed budget amount set for service rendered since the cost is neither predictable nor controllable.

If one is charged with containing the costs of online searching, charging user fees is a viable management tool. Not only do fees partially pay for the costs but in actuality these fees tend to keep the costs down. Once patrons become aware of the fact that they must pay for a service they become more reflective of the need for the information that they have requested.

Armed with this information library management would not be out of line in formulating a search form for the public to fill in before the actual search for online information is performed. Online searching forms can be used to define the actual search. The patron can be requested to supply information that would clarify the purpose of the search. Keywords, authors, dates, languages, and topics can be address.

The basic search form also clarifies the fees that will be involved. As is noted in Table 4, many of the libraries surveyed do charge a fee for their online search services. Several libraries use their discretion in charging for complex searches but not for simple searches. Some libraries allow patrons a limited amount of free searching and then begin to charge once that limit has been reached. Some libraries charge fully for each search. Cape May

County Library would not be out of line in charging for some of the online services rendered.

A problem arises in defining the meaning of the word "some". Library A sets a seven dollar limit on the charges they will absorb before fees are then charged to the patron. Library A's reference policy also clarifies the fact that payment is due before information is released and that the user may stipulate a cost limit to a search. A concern arises in that the fee structure in the policy of Library A could become quite complicated and ill-defined.

There is one particular type of search that is done with relative frequency at the Cape May County Library that can be easily managed. This search is the Dun and Bradstreet search on DIALOG file 516. This search produces a controlled amount of information at a controlled price. This database search can easily be managed with a reference form and fee charge. Therefore one policy recommendation would be that a Dun and Bradstreet search be undertaken only for a fee.

Patrons should be aware that fees also vary by the skill and accuracy of the staff member. Here is where training on a database becomes an important issue. Searching should not necessarily be done at the time of patron demand. A search should only be performed by a librarian trained in searching on the particular database to

be accessed. If this does not occur, the patron may end up paying charges that could have been prevented. In order to alleviate this problem, there should be a provision in the search form that the patrons signs which it states that searches are done only by appointment.

Table 3 addresses the issue of scheduling. There are other important points brought out in Table 3. Online searching can involve a great deal of time and money. Every effort should be made to assure the appropriateness of such a search. At least one half of the libraries surveyed preferred to include the input of the patron in preparing the search. Vital information pertaining to the search form is then provided by an interview with the library user. The library patron is asked to provide facts such as appropriate keyword, author, other sources searched, amount of citations required, currency needs and of course the topic in question.

A disclaimer for fees accrued is also necessary to complete the needed information. Fees charged for services which are listed on Table 4 range from five dollars to forty dollars. Online fees can quickly add up. Unfortunately, some searches do not fully answer the question that they were intended to answer. The user must be made aware that such a possibility can occur. Library C has a search form that contains the following statement for clearly the

intention of the search:

I understand the cost of searches vary depending on the database searched and the time spent online. Actual cost cannot be determined until the search is completed. I agree to pay the library for a computerized bibliographic search, even if no relevant citations are found for my topic.

This statement brings home the fact that fees have the ability to limit consumption of online services. This method of limitation encourages both patron and librarian to preplan the search method as well as be assured that it is necessary information that is to be obtained. Conversely, because of the fact that searching becomes more efficient with these restraints, the variety of databases may be increased. User fees not only weed out unnecessary work and time but the fees also offset the cost of the services.

Table 2 shows the status of online policies at various New Jersey libraries. It can be seen that a formal policy is not frequently the method of choice. A search form should lend credibility to the formality of searching without the necessity of an extended written policy.

Appendix F is an example of a request-for-search form that would be a useful management tool at the Cape May County Library. All of the elements previously discussed in

this chapter are woven into the context of this form. With this presentation of such variables as cost and skills needed, the patron will become aware of the intricacies of online searching.

Table 6 deals with an entirely different aspect of the reference services. Magazines are necessary to add currency to the information services. Again, this is a service that can quickly deplete a good portion of the reference department budget. The statistics gleaned from table 6 show that periodical format is in a great deal of flux. The hard copy of a magazine still seems to be the format of choice though microfilm, microfiche and online services such as Information Access Company (IAC) are becoming an important part of the mix of formats.

Regardless of the format however, the selection of which is beyond the scope of this study, one can plainly see that most libraries in this survey have levied charges to offset the costs that are involved with printing out the information from a magazine. Levying charges obviously appears to be acceptable when it comes to reproducing materials from periodicals. The Cape May County Library is at the bottom of the scale when it comes to cost per page of magazine information. Fees could easily be raised to offset the costs of paper, toner, photocopier repairs, etc. The negatives, of course, would be the fact that the public may

react adversely at first. Also, making changes would be slightly more time consuming if the fee is raised to fifteen cents.

The cost for monthly InterLibrary Loan articles that are needed to subsidize in-house subscription services is money well spent. If five dollars per article can be assumed as the cost, then this would involve a cost of one-hundred and fifty dollars. This calculation is based on the data that suggests an average of thirty magazine articles per month fills the needs of the patrons. This sum of money would only buy approximately six additional magazines. These additional magazines would still not change the number of articles requested to any extent.

Libraries will continue to change slowly to accommodate the needs of the society in which they flourish. Computerization appears to be the trend of the present and the future. Gradually libraries will increase their dependency on the online services since the public will be demanding such services. As the format of information changes, the costs will increase. The budget cannot be fixed when access to online services is a major portion of the cost of information since patron needs cannot be predicted. Cape May County Library, along with other public libraries in New Jersey, will have to reassess the rationality of free information as library users become more

demanding in their choices of information access.

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APPENDIX A

New Jersey Statutes Annotated Title 40

ARTICLE 1. FREE PUBLIC LIBRARIES

40:54-1. Establishment; chapter applicable to libraries established under other laws.

Any municipality may, in the manner hereinafter provided, establish a free public library within its corporate limits.

Every library established under this chapter, and every free public library established pursuant to any general law shall be governed by the provisions of this chapter.

ARTICLE 3. AID TO PRIVATELY OWNED LIBRARIES
AND READING ROOMS

40:54-35. Library funds

The governing body of any municipality may appropriate and raise such sum of money as in its judgment may be deemed necessary to aid libraries and reading rooms in serving any such municipality, whether such libraries or reading rooms be located in such municipality or in an adjoining municipality; provided, the person or corporation owning or controlling any library and reading room receiving and accepting such aid shall keep the same open free to the use of the public at such reasonable hours as meets the approval of the governing body of such municipality.

Amended by L.1938, c. 68, p. 179; L.1941, c. 199, p. 589; L.1943, c. 24, p. 58; L.1947, c. 219, p. 880; L.1956, c. 78, p. 165, eff. June 7, 1956.

ARTICLE 1. FREE COUNTY LIBRARIES

40:33-1. County library; establishment

The board of chosen freeholders of every county shall, in the manner hereinafter in this article provide, establish a free public library to be known as "the free county library". This library shall be established for such subdivisions of the county as do not maintain and control free public libraries, pursuant to the provisions of chapter 54 of this title (40-54-1 et seq.).

APPENDIX B

Representative Search Methods. OCLC

ONLINE UNION CATALOG SEARCH KEYS

<u>Kind of Search</u>	<u>Search Key</u>
<u>Title</u>	3,2,2,1
Realism in modern literature	rea,in,mo,l
The complete circuit training guide	com,ci,tr,g
I believe in Unicorns	i,be,in,u
Hotel	hot...
Miracle on 34th Street	mir,on,34,s
<u>Title Phrase</u>	All or the beginning words of the title excluding initial articles
I believe in Unicorns	I believe in unicorns
<u>Name*/Title</u>	4,4
Clark/2001: a space odyssey	clar,2001
Hailey/Hotel	hail,hote
International Philatelic Association/The stamp collector's magazine	phil,stam
<u>Personal name</u>	4,3,1
Becker, George Joseph	beck,geo,j
Sobey, Edwin J. C.	sobe,edw,j
Cummings, e. e.	cumm,e,e
De Graaf, Adriaan	degr,adr,
Kubler-Ross, Elizabeth	kubl,eli.
<u>Corporate name</u>	=4,3,1
Hershey Foods Corporation	=hers,foo,c
American Rock Garden Society	=rock,gar,s
Adrian College	=adri,col,
Symposium on Man Made Forest in India	=man,mad,f
<u>ISBN</u>	Complete number without hyphens
0-8247-7142-7	08246711427
0-85109-130-X	085109130X
<u>LCCN</u>	Complete number with hyphens
78-52051	78-50251
<u>CODEN</u>	All characters
BASICR	cd:bassicr
AISJB6	cd:aisjb6
<u>OCLC control number</u>	# or * followed by complete #

APPENDIX C

Fee-Based Services

Access to library collections through online catalog
Access to library databases both hardcopy and online
Assistance to researchers
Bibliographic citations
Commodity reports
Computer database searching education
Computerized search services
Consulting services
Credit reports
Document delivery
Electronic mail
Evaluation of literature review
Infodash (Staff "dashers" are sent to retrieve documents)
Interlibrary loan
Literature searching
Long-distance telephone calls
Market research
Photocopying services
Pull services (items are available at desk for quick pickup)
Research
Selective dissemination of information (SDI)

APPENDIX D

Survey Cover Letter

January 6, 1996

Head of Reference
Mercer County Library
2751 Brunswick Library
Lawrenceville, NJ 08648

Re: Questionnaire

Dear Sir or Madam:

I am currently studying the feasibility of using a formal online policy statement to standardize searching procedures. This is the topic that I have chosen for my Master's thesis at Rowan College of New Jersey. The data collected in this study will also be used in my current position in the Reference Department of the Cape May County Library in order to review policies now in effect.

In order to collect data on this topic I enclosed a questionnaire on the subject to be completed by the person who is most familiar with online searching and magazine sources. This questionnaire can be returned to me by mail in the enclosed stamped self-addressed envelope or by Comet delivery via Cape May County Library, 30 West Mechanic St, CMCH, NJ 08210. Attention: Linda Melroy. I would appreciate receiving the questionnaire back within two weeks.

Thank you very much for your cooperation. I will be happy to share the outcome of the survey with anyone who is interested.

Sincerely,

Linda L. Melroy

APPENDIX E

Online Policy Statement-Questionnaire

Name:
(optional) _____

Library: _____

Thank you for taking the time to answer the following questions.

Does your library have an online policy statement? _____
If so,

Is it a written policy statement? _____ (Will you please
enclose a copy of your statement if possible?)

Though not formally written, is there an official
online policy at your library? _____
Is your policy informal? _____

Regardless of the form that your statement takes, will you
answer the following questions?

Who is responsible for performing searches?
_____ One librarian is assigned to the task
_____ All reference librarians
_____ All librarians
_____ Some librarians
_____ Other, Please explain _____

How are searches assigned?
_____ Informally as needed
_____ On a rotating basis
_____ By subject area expertise
_____ Other, Please explain _____

How is patron involvement handled?
_____ Patrons can search by themselves
_____ Patrons need an appointment
_____ Patron should be present during search
_____ Patron must fill out a "Request for Search" form
_____ Other, Please explain _____

Which CD-ROMS do you use as major reference sources? (Please check)

BIP DUN AND BRADSTREET
 SIRS GRANGERS
 THOMAS REGISTER OTHER (Please specify) _____

What type of magazine sources do you have? (Check all applicable)

Hard copies
 Microfilm/fiche
 Magazine Collection - such as IAC
 Online services - such as IAC-full text

Do you charge for printing? _____ if so, how much? _____

Approximately how many journals-newspapers does the library subscribe to? _____

Hard Copy _____ Microfilm/fiche _____

On a monthly average, how frequently must you supplement your magazine holdings from a source outside your library? _____

What is the method of supplementing your magazine collection?

ILL DOCUMENT DELIVERY OTHER _____

Do you use the Internet as a reference tool? _____

For statistical purposes:

Number of volumes in your library? _____

Size of the population you service? _____

Please feel free to comment or elaborate on any of the questions. And again, thank you.

APPENDIX F

Cape May County Library
Online Fee-Based Computer Search Form

One line searches are performed by experienced reference personnel after in-house sources have been thoroughly researched. The SJRLC Referral Service is recommended for some specific topics. Contact the reference desk for an online search appointment.

Name: _____ Address: _____

Telephone: _____ Library Card Number: _____

Please complete the following:

1. Description of topic (be specific). What is the purpose of your search request?

2. Define search terms (if known).

Term _____ Synonym _____

3. List sources that you have searched including indexes if applicable.

Title _____ Subject heading _____

4. List important authors _____

5. Do you want the search limited by date? Yes? ____ What years? _____ No? ____

6. If there are any aspects of your subject that you DO NOT want us to search please specify.

7. Should the search be limited to a specific number of citations? Yes _____ No _____

If yes, how many? _____

8. What language do you want? English ____ Other (specify) _____

9. What type of format would you like your results to include:

Citation Only? _____ Citation & Abstract (more expensive)? _____ Offline? _____

10. Maximum amount you wish to spend \$ _____

I understand that searching costs depend upon the database searched, the time spent online and the format of the information obtained. Actual cost cannot be determined until the search has been completed. I am also aware that though the search process may not turn up any substantial citations I am still responsible for charges incurred. A deposit may be requested.

Signed _____

BIOGRAPHICAL DATA

Name: Linda L. Melroy

Date and Place of Birth: February 8, 1948
Frackville, Pennsylvania

Elementary School: Frackville Schools
Frackville, Pennsylvania
Graduated 1959

Junior High School: Northeast Junior High School
Reading, Pennsylvania
Graduated 1962

High School: Reading Senior High School
Reading, Pennsylvania
Graduated 1965

College: University of Pittsburgh
Pittsburgh, Pennsylvania
Graduated 1969

Graduate Appointments: Cape May County Library
Cape May Court House, New Jersey
Library Technical Assistant
1988-1991

Cape May County Library
Cape May Court House, New Jersey
Interlibrary Loan/Reference
1991-