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SCHOOL LIBRARY SERVICES AFTER ERA

An investigation of the effect of the 1988
Education Reform Act on School Library Services

by

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ABSTRACT

This study has addressed three core questions:

- What is the current state of School Library Services?
- How is the Education Reform Act affecting these services?
- Why are specific choices being made by School Library Services from the options available post-ERA?

Information was gathered from questionnaires, consultation, seminars etc., and also by contact 1989-91 with 14 authorities in England and Wales. Specific matters investigated over the two-year period were:

Structures; Policies; Service range and level; Relationships.

The study found evidence that ERA had a significant effect during this period on library support services to schools, but that other influences on change were at work, most notably the community charge and its repercussions. All the School Library Services in the contact authorities changed between 1989 and 1991, although in different degrees, and it was observed that the effect of national legislation was being mediated by local cultures. The hypothesis that 'The Education Reform Act is leading to new perceptions of School Library Service effectiveness' was upheld, and factors making for effectiveness were identified.

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List of Acronyms

ACL:E & SS	Assistant County Librarian: Education and Special Services
AMDECL	Association of Metropolitan District Education and Children's Librarians
BELL	Berkshire Libraries for Learning (Project)
CCT	Compulsory Competitive Tendering
CEO	Chief Education Officer
CIPFA	Chartered Institute of Public Finance and Accountancy
CLAIM	Centre for Library and Information Management
CRUS	Centre for Research on User Studies
DCSL	Divisional Children's and Schools Librarian
DENI	Department of Education Northern Ireland
DES	Department of Education and Science
DMR	Devolution of Management of Resources
DOE	Department of the Environment
ERA	Education Reform Act
ESG	Education Support Grant
ESSE/L	Essex Secondary Schools Education/Library (Project)
GCSE	General Certificate of Secondary Education
GEST	Grant for Education Support and Training
GMS	Grant-Maintained School/s
GRIST	Grant Related In Service Training
GSB	General Schools Budget
HMI	Her Majesty's Inspectorate
ILEA	Inner London Education Authority

INSET	In Service Education and Training
INSIS	Information Skills in Schools (Project)
IPPR	Institute for Public Policies Research
LEA	Local Education Authority
LIP	Library and Information Plan
LISC	Library and Information Services Council
LISU	Library and Information Statistics Unit
LLS	Link Library Services
LMS	Local Management of Schools
MACOS	MAN: A Course Of Study
NCC	National Curriculum Council
OAL	Office of Arts and Libraries
OSTI	Office for Scientific and Technical Information
PLDIS	Public Library Development Incentive Scheme
PSB	Potential Schools Budget
RDG	Research and Development Group
SCCC	Scottish Consultative Council on the Curriculum
SED	Scottish Education Department
SIMS	Schools Information Management System
SLIC	Scottish Library and Information Council
SLS	School Library Service/s
SMT	Senior Management Team
SOCCEL	Society of County Children's and Education Librarians
SOED	Scottish Office Education Department
THIL	The Teaching, Handling Information and Learning (Project)
TRIST	TVEI Related In Service Training
TVEI	Technical and Vocational Education Initiative

CHAPTER ONE: INTRODUCTION

1. Definitions
2. Purpose of the study
3. Significance of the study
4. Study rationale
5. Research hypotheses and core questions

CHAPTER ONE : INTRODUCTION

1. Definitions

The Education Reform Act 1988 contains some provisions relating to universities which apply to Scotland as well as England and Wales, but most of its sections relate to schools and are applicable to England and Wales only.^[1]

School Library Service: The definition used in this study is that contained in *School libraries: the foundations of the curriculum*.^[2]

By school library service we mean the resources additional to those of the school itself in the form of books and other media, staffing and the other services made available to schools by education authorities to support the provision of libraries in schools. We make no distinction between education authorities using public libraries as their agents and those who provide services directly. [p3]

While this support service is known by a variety of names, 'School Library Service' is the term most widely used in England and Wales, and will therefore be the name employed in this study.

2. Purpose of the study

The study sets out to investigate the effect of the 1988 Education Reform Act on School Library Services (SLS). Its focus is therefore on England and Wales, the countries to which the main provisions of the Act apply. However, as a means of comparison some study of SLS in Northern Ireland and Scotland is included. Northern Ireland now has similar (but not identical) legislation through an Order of 1989^[3], but the SLS is a statutory service in each Education and Library Board area - a status which has long been urged in England and Wales. In Scotland there is no comparable legislation, the most recent Act relating to school boards^[4].

As later sections of this report show, many of the provisions of the 1988 Education Reform Act (ERA) have a potential effect on SLS. The study investigates the changes occurring in these support services, looking at both causes and outcomes and attempts to identify trends in such matters as service purpose, scope and priorities. A particular area of interest is the management of change over the period 1989-1991, as implementation of the Act began.

To assist consideration of management of change, the study provides an overview of the state of SLS at the beginning of the period, drawing on statistical and survey evidence. Other data derives from case studies, and here a major purpose is to set the changes taking place within SLS in a wider local government context.

3. The significance of the study

The study is seen as a significant contribution to knowledge, for the following reasons:

- (i) It is the first major study concerned with these support services. The future of school libraries, and of school learning programmes, is closely linked with the scope of assistance available from SLS. At a time of rapid change it is important to document the new service patterns emerging, to consider the contexts to which they are appropriate, and to make clear both the advantages and disadvantages of the changes.
- (ii) SLS provide support significant in both its scale and operation. The majority of Local Education Authorities (LEAs) in England and Wales provide such a service; and the statistics for 1987/8 - excluding Inner London Boroughs where the Inner London Education Authority was at that time the providing agency - show that service expenditure amounted to some £22 million.^[5]
- (iii) The contribution made by SLS to the development of school libraries and school learning programmes is also considerable. This was documented by 1985/86 returns to the Office of Arts and Libraries, which showed 70% of respondents engaged in development plans for school libraries. The analysis of these returns and supplementary

case studies included in my *School libraries on the move*^[6] showed the leadership role played by SLS in the initiation and implementation of local school library development. More recently the role of SLS has been acknowledged in reports of Her Majesty's Inspectorate. For example a survey of secondary school libraries published in 1990 found:

Good use co-exists also with active schools library services: their resources, knowledge, staffing and advice continue to be a substantial benefit to schools.^[7]

A different perspective, that of the school librarian, was provided in *Sneaky teaching*^[8] which found that the existence of a strong support system in the form of a School Library Service was a major factor in establishing the status of the individual school librarian and helping the development of his/her role. The case studies of six Berkshire secondary schools in *Assessing school libraries* show the high value placed by teachers on outside support in resource selection, book promotion and information skills programmes - areas covered by most SLS.^[9]

- (iv) The study is significant in its timing, coming when local government generally, and not just SLS, is being urged to adopt a more commercial approach. The advent of compulsory competitive tendering, following the provisions of the

Local Government Act 1988, is already bringing new challenges to LEAs, where, as Derek Esp has observed:

they will find themselves in competition with other alternative "producers"... The impact of financial delegation, the broader legislative changes and the underlying philosophy of consumer choice and the attempts to raise standards through the operation of the market place will push the LEAs in the direction of their new role as providers, organizers and enablers in the competitive market.^[10]

Changes for SLS may, then, mirror and illuminate change taking place in the wider sphere of local government. The way in which management of SLS change is affected by the culture of the parent department - be it Library or Education Department - is another theme of the study and this widening of its framework increases potential interest in its findings.

- (v) The study is significant methodologically in its treatment of case studies. This matter will be treated in more detail later in this report, but here it may be sufficient to note that an attempt will be made to avoid some of the weaknesses of case studies as research tools, by following a more rigorous research design from the outset. This has been formulated according to the principles set out by

Robert K. Yin in his standard work *Case study research : design and methods*^[11]. The study will test the procedures advocated by Yin and their appropriateness to research in librarianship.

4. Study rationale

The first point to note is the lack of research into School Library Services, as an early search of *Current Research* revealed. No relevant thesis material was identified. Some studies of services in specific authorities were noted (for example, for Lancashire and West Glamorgan), but none with a national remit. The search of journal indexes and abstracts showed even a paucity of articles. This situation has changed somewhat over the period 1989-91, for example with Gaynor Eyre making a study of School Library Services at Sheffield University and the heads of SLS in Bradford and Lancashire undertaking similar studies connected with higher degrees. It is largely the lack of research which provided a rationale for this study.

A number of reports published over the past few years have reinforced the need to research SLS. Many of these will be referred to in later chapters and some are described in Part II, Literature Review.

The starting point, as for so much development in the school library field, was *School libraries : the foundations of the curriculum*^[12]. From the outset this report recognised the

importance of SLS to school learning programmes, including this as the first of its three main theses.

Firstly that school libraries and school library services have a vital role to play in educating children to be able to make use of information in formal education and throughout life [p vi].

The working party appointed by the Library and Information Services Council (LISC), which produced the report, notes that most LEAs provide a SLS, usually operated on an agency basis by the local library department, but found some disturbing signs.

There are signs, however, that in some parts of the country, educational services lacking statutory protection, including school libraries and school library services, are increasingly under threat of abolition or serious curtailment because some authorities have decided they lack the means to continue to fund them because of the Government's policy of reducing local government expenditure [p5].

No 'authoritative statement which questions the need for school libraries and school library services' [p6] was found, and evidence was collected of the important contribution being made by SLS to in-service programmes for teachers and to school library development through a range of resource and advisory services.

[p17-20] The report, then, made clear the value of SLS, while perceiving threats to their future. It also made a number of recommendations, including proposals for collection of further data on SLS, case studies of good practice and research into particular themes [p23].

Two particular research projects can be said to have arisen from these recommendations. One was the Berkshire Libraries for Learning (BELL) Project, which I coordinated. This attempted to follow up Recommendation 13.3.1 of the report, i.e. 'To clarify the objectives of school libraries and the school library service and to establish a policy framework for them'.

Findings were published as *School libraries on the move*^[13], and that report in its turn served as an influence on the present study, which can be seen as an attempt to fulfil one of its seven closing recommendations:

A comparative study of SLS in England, Northern Ireland, Scotland and Wales, with particular regard to departmental structures; service parameters and priorities; and service evaluation [p34].

The second piece of research followed up the LISC report's suggestion of investigation of 'Role perceptions of teachers and librarians and their effects if discernable' [p23]. It has already been noted that the subsequent *Sneaky teaching*^[14] showed how

influential a strong SLS could be, which pointed to the value of further research.

A specific example of the influence of a SLS on educational change was given in *Library provision and curriculum planning*, an evaluation of a challenge funding project mounted jointly by the Education and Library Departments in Essex.^[15] While overall the Essex initiative was deemed to be valuable, and tribute was paid to the SLS for its major part in initiating and implementing the scheme, both evaluators and SLS staff themselves were left with questions as to the appropriate role of the SLS. The report found considerable ambiguity in the roles of the five Divisional Children's and Schools Librarian (DCSLs) who held key positions in the project's structure.

Structurally, and in terms of day-to-day duties, the DCSL is very much part of the library service.
Functionally, the role is clearly educational [p 28].

How far these staff should be involved in curricular discussions in project schools was queried by the evaluators and was a matter on which DCSLs themselves had different views [p29].

Such uncertainty about the role of SLS staff is at odds with the confidence of *School libraries : the foundations of the curriculum*^[16], which sees SLS advice covering:

a wide range of aspects from the planning and equipment of school libraries, the practical aspects of their organisation and management, to curriculum aspects such as policy development, information skills development across the curriculum and the appropriate use of information technology in school libraries [p19/20].

Here, then, was another aspect of SLS meriting further investigation.

Taking these reports as a whole, one gathers the following observations:

SLS have a valuable role to play in supporting school learning programmes, but at present it is only partly fulfilled.

There is lack of clarity on the objectives and parameters of SLS.

A range of moves in central and/or local government present threats to the future of SLS.

Lack of specific information on SLS makes it difficult to assess their value or frame proposals for their development.

It was from such considerations that this study grew. As can be seen, some influences date from as long ago as 1985. On a personal

level, my association with the field as practitioner and researcher, and the desire to pursue questions raised in some of my earlier publications, provided strong motivation. In 1988 a new factor arose, with the passing of the Education Reform Act. Many of its provisions appeared likely to affect SLS, and added to the concerns already expressed by the LISC working party about the future of SLS. At that stage it became clear that the research focus should be the effect of the Act on SLS in England and Wales.

The opportunity to study the subject as coordinator of the Supports to Learning project, funded by The British Library from 1989-91, was of major benefit, providing a context within which the study could be developed.

5. Research hypotheses and core questions

The study began with three core questions which correspond to three of the question categories suggested by Yin^[17].

(1) What is the current state of SLS?

Interest here centred partly on quantitative measures and partly on qualitative ones. As early as November 1989, discussion with Her Majesty's Inspectors (HMI) and heads of SLS led to identification of the need to investigate such matters as structures, policies, liaison procedure, service priorities and possible areas of SLS development.

Many of these topics were addressed in the project questionnaire, developed some months later.

(ii) How is the 1988 Education Reform Act affecting SLS? The following variables were identified as significant:

Structures; Policies; Service range and level;
Relationships.

(iii) Why are specific choices being made from the options available to SLS post-ERA? Here the variables given attention were:

The culture of the authority and the parent department;
The situations of the actors involved;
The perceptions of the actors involved.

As evidence was collected, through consultation, visits and the questionnaire results, the process of hypothesis formulation began. As can be seen in the following list, the hypotheses framed moved from general to specific considerations.

The provisions of the 1988 Education Reform Act will bring change for SLS.

Certain internal factors will assist the process of SLS change.

There is a relationship between the response of an SLS to the provisions of the Education Reform Act and the culture of the parent body.

The proposition that the 'consultative or client-orientated model seems to offer a more positive and realistic approach to the LEA's role in the future'[18] also holds good for SLS.

There is tension between two different roles for SLS - one commercial, the other advisory - both being encouraged by the Education Reform Act.

Taking these together, one can see an overall interest in the options open to SLS currently, the factors affecting the choices being made, and the way in which any changes are being managed. The investigation of SLS is necessarily set in the wider context of local authority change.

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CHAPTER TWO: LITERATURE REVIEW

1. Introduction
2. Research reviews
3. School Library Services
4. Curriculum innovation
5. Summary

CHAPTER TWO : LITERATURE REVIEW

1. Introduction

It has already been noted (Chapter One, 3(i)) that there has been no major study of SLS within England and Wales. The literature review below, therefore, draws on a wider field, moving beyond school library research to offer insights from related fields, taking in implementation of curriculum innovation in schools. One particular purpose of the review is to examine the methodologies used by previous research, with the aim of discerning approaches which may be helpful. Another is to note findings which may prove relevant.

2. Research reviews

It is appropriate to look first at two general reviews of research in the United Kingdom - as one might turn first to a bibliography of bibliographies in a literature search.

- 2.1 A view from outside is provided by *Library and information research in the United Kingdom: some observations on design, methods and diffusion*^[1], a report by Carmel Maguire, a visitor from the School of Librarianship, University of New South Wales, who held a British Library Visiting Fellowship, based at Loughborough, in 1980.

The aims of the fellowship were to study research designs and methods, and the view held by practitioners on the relevance of research.

Two points on methodology to note from this review are the need for greater rigour in research design and methodology, and the problems caused by a dichotomy between qualitative and quantitative approaches. Maguire also directs attention to an unfortunate gulf between practitioners and researchers, and thereby challenges later researchers to take account of practitioners' views, language and information channels from the outset.

- 2.2 A more recent perspective is provided in Nick Moore's 1987 review *Research and practice: 21 years of library research in the UK*^[2]. Its scope and purpose are, however, very different from those of Maguire, for it attempted to highlight all the research relevant to public libraries funded by the British Library Research and Development Department and its predecessor, the Office for Scientific and Technical Information (OSTI) and assess its relevance.

Moore covered 300 research projects funded during the period 1965-1986, but one should recognise that the specific research programme for public libraries was established by The British Library only in 1978, following an earlier research review by Moore^[3].

The review is useful as an historic record, with which one can compare the present, and it is interesting to read in conjunction

with the Research and Development Department's 1989/90 report^[4]. One notes, for example, that Moore has no section given to school libraries, and the small amount of research in this area is contained in Chapter 10 User Education. This chapter shows interest in user education in schools coming at a relatively late date, following the influential report by Ann Irving and Wilfrid Snape^[5]. By contrast, the Research and Development Department's 1989/90 report has a separate section given to 'Educational Information Research', and the department now also issues a separate booklet *Information skills in Education*^[6].

This review is also a reminder of the ambivalence of the status of School Library Services. In most English and Welsh LEAs these services are based in Library Departments, yet for years they have seemed peripheral to public library interests.

3. School Library Services

While SLS have not been the subject of specific research, a number of publications provide some information relevant to this study.

Histories

- 3.1 The major source here is *Library services for young people in England and Wales 1830-1970* by Alec Ellis, a lecturer with a special interest in the history of children's reading, literature and libraries^[7].

Ellis sets out to examine library provision for young people 1830 to mid-1970 'both critically and in some depth'. While the emphasis is on the public library service, the author also seeks to explore 'the motivation behind the school library movement and its subsequent application' [p xi, xii].

The chapter titles suggest a progression, moving from 'The pioneering years, 1830-1880' to 'A professional approach, 1960-1970'. The closing words are in line with observations of later researchers, and are relevant to current SLS:

Whilst an integrated service to young people was highly desirable, it was clear that this would not in itself create an ideal library situation in schools. Librarians believed that they could create a consciousness of the value of books in schools, and to a limited extent they were correct. However, real progress in school libraries was dependent upon a commitment by teachers to active educational methods and, until this was realized, the place of the library in the school could never be more than peripheral. Many librarians in schools and public libraries were providing a superb service in relation to the resources at their disposal and the cooperation of their superiors, but no one could deny that in all aspects of the work much, perhaps most, remained unaccomplished. [p164]

This is essentially an introductory survey, enabling SLS to be seen in a historical context, rather than an example of formal historical inquiry - as defined by Busha and Harter^[8]. It is among sources drawn upon for the historical survey of SLS which appears in Chapter Four. The references at the end of each chapter and the final bibliography provide a starting point for further investigation.

- 3.2 Another obvious source for historical study is Sheila Ray's *Library service to schools*, now in its third edition^[9].

This is an introductory work intended 'for librarians who are not directly involved in running school libraries'. It is seen as a basic guide describing 'the aims and function of the school library resource centre' and suggesting 'the kind of help which a school library service can most usefully provide' [p v].

The author emphasises that 'the school library services in Britain have nearly as many variations as there are services' [p53] but the picture which emerges reflects an orthodox SLS, as seen from the late 1960s - the date of the first edition - through the 1970s, and this picture goes unchallenged. For example, the various services are described as being:

only likely to be provided effectively if they are paid for by the local authority's education committee with, in most cases, the public library providing an agency service [p50].

This acceptance of existing structures is carried through into specific service aspects, for example in the description of an exhibition collection as 'one of the basic features of the school library service' [p42] with no questioning of the relation of cost and use.

It would be wrong to assign to this pamphlet an importance never intended. However, it is valuable as a historical document, which helps one judge the progress made by SLS, particularly in moving beyond a resource-providing role to become agents of school library - and sometimes curricular - change.

Current School Library Services

A number of recent research reports, while not intended as studies of SLS, do throw light on the role of these support services. They include three emanating from The British Library, one funded by the Office of Arts and Libraries, and a fifth produced cooperatively within Loughborough University.

- 3.3 *Library provision and curriculum planning: an evaluation of the Essex Secondary Schools Education/Library project* was prepared by a team from the Essex Institute of Higher Education - Ron Best, Susan Heyes and Mike Taylor^[10].

Its overall aim was to evaluate the effects of the Essex Secondary Schools Education/Library project (ESSE/L), an experimental project for funding specific library developments in selected secondary

schools, which had been designed and implemented by the Essex Education and Library Departments cooperatively. This evaluation was proposed by the team co-ordinating the project, as a means of discovering the degree to which the stated objectives of the project were being achieved. The Essex challenge scheme was initiated in 1980/81 and was still continuing in 1985/86.

The overall research approach followed an interpretive rather than positivist model. In the tradition of qualitative research, the evaluators were interested in discovering 'the perspectives, situational definitions and shared meanings of a range of actors' [p11], drawing insights from Alfred Schutz, the proponent of social phenomenology, who stressed that 'the biographical situation' is a basic unit of human understanding^[11], and from symbolic interactionism which holds that human reality is socially and symbolically constructed, emerging from and related to aspects of social life.

The research style was described as 'illuminative evaluation', as defined by Parlett and Hamilton.

The choice of research tactics follows not from research doctrine, but from decisions in each case as to the best available techniques: the problem defines the methods used, not vice versa. Equally, no method (with its own built-in limitations) is used exclusively or in isolation: different techniques are combined to throw light on a common problem^[12].

The report, although subtle in its presentation of information, is a rich source for students of SLS and in particular of the challenge-funded development schemes which were used by several authorities 1985-1988 as a means of school library development. It is also valuable as a chronicle of change management.

The work touches on basic questions of the appropriateness of SLS involvement in curriculum development, but fails to resolve them. Indeed, how far the evaluation is satisfactory is debatable. One wonders whether a research team drawn from outside Essex would have felt less inhibited. Also, the evaluations take a rather unquestioning stance towards the parameters of the Essex scheme. Unease about the limitations of challenge schemes based mainly on book provision, was expressed in *Journal of Education Policy* in 1987^[13]. Further disquiet at this resource-dominated approach can be found in *School libraries on the move*^[14] and in *Perspectives on a partnership*^[15].

A basic problem for the Essex researchers was the difficulty of isolating the effect of ESSE/L from other events in the project schools, and their comments have relevance for this present study, where one needs to consider how far variables relating to ERA can be isolated in a complex context.

3.4 A more general view of the effect of SLS on school library development is given in my own *School libraries on the move*^[16].

The major part of the report describes the Berkshire Libraries for Learning (BELL) Project, which aimed to carry out Recommendation 13.3.1. of *School libraries: the foundations of the curriculum*^[17]:

to clarify the objectives of school libraries and the school library service and to establish a policy framework for them.

A supplementary study aimed to give an overview of school library development in England, with case studies of change in eight local authorities - Avon, Bexley, Bradford, Cornwall, Cumbria, Devon, Gloucestershire and Hertfordshire.

The BELL project was designed on an action-research basis, and was consultative and collaborative in its approach, involving a wide range of participants. It was influenced by Fullan's *The meaning of educational change*^[18], and took as its focus the stages of school library change, and in particular the role of outside-school agencies.

Specific outputs of the BELL Project included a range of reports on Berkshire library-related initiatives, three of which were published by The British Library^[19].

The report raised a number of questions on the policies, status and support role of SLS, as well as making a series of recommendations for action and future research.

3.5 A research project which brought together the expertise of a librarian and a teacher was *Sneaky teaching*, published in 1988^[20].

This study set out to examine the different perceptions of British classroom teachers and school libraries 'with the ultimate objective of recommending ways to bring differing perceptions together' [p1]. It was hoped to identify practices which seemed to create positive role perceptions, with a view to encouraging their adoption. It was also hoped to promote discussion of ways of evaluating the effectiveness of school libraries.

The research was confined to secondary schools in three authorities - Nottinghamshire, Shropshire and the Grampian Region of Scotland.

In terms of methodology the study offers a clear example of the ethnographic approach, which has been defined as:

an in-depth description of an intact cultural scene^[21]

The findings, to a certain extent, confirm other surveys' results. For example, most teacher-librarians had received no formal training: nearly 33% of teachers made no use of the school library: English, history and humanities departments were those calling most on library resources; individualised learning programmes and high library use were linked. Some fundamental differences in perception were found, for example on responsibility for book selection or information skills, and on the role of the librarian in the educational process.

The teaching style of the school was found to be 'one of the crucial factors in developing the use of the library and the role of the school librarian' [p78]. The relationship between the education and library services was less important to the acceptance and development of the librarian's role than the existence of a strong SLS.

The report ends with a series of recommendations on increasing understanding between school librarians and teachers. It was supported by a pack of discussion documents for use in training sessions^[22].

This survey of the different perceptions of two professions has relevance to the present study which must take into account role perceptions of Education officers and teachers on the one hand, and SLS staff on the other.

3.6 Light is also thrown on SLS in two presentations of statistical data. The first published is *Schools' and children's libraries in England and Wales 1987-1988* compiled by Martine Donoghue^[24].

The work was carried out in association with the Association of Metropolitan District Education and Children's Librarians (AMDECL) and the Society of County Children's and Education Librarians (SOCCEL) and replaces 'profiles' previously available only to members of the two groups.

The survey results are presented in the form of raw data, arranged first by topic and then by type of authority. There are no summaries and no interpretations.

It is therefore difficult to draw meaning from the statistics as presented, but an analysis was prepared by Jennifer MacDougall, research assistant at Loughborough University's Department of Library and Information Studies, and appears in *School Library Services today*, published by The British Library in 1990^[25]. The Library and Information Statistics Unit (LISU) at Loughborough University produced similar statistical coverage for 1989/1990 and this time sought specialist advice from the Department of Library and Information Studies. The interpretation and presentation of the 1989/1990 data was therefore an improvement on 1987/1989, but some of the weaknesses will remain while ambiguities in the questionnaire remain. This failure cannot be attributed completely to LISU but it is ironical that the director of LISU for the academic year 1990/1991, Alan MacDougall, has previously published a critique of library and information statistics which emphasises the need to exhort bodies associated with the compilation of statistical series to recognise the importance of good questionnaire design, good presentation and the use of specialist advice^[26].

Moore has stressed the value of statistics to help inter-library comparison, providing a management tool for evaluation of individual library systems^[27]. All indications are that the

collection of SLS statistics by LISU will continue, and that their analysis will develop.

- 3.7 Statistics for a longer period - 1982/83 to 1986/87 were provided in *Public library services for children and young people: a statistical survey*^[28].

This survey arose from a joint submission to LISC by two professional groups (AMDECL and SOCCEL) requesting a general investigation of public library services to children and young people. Central to the submission was concern at a number of recent trends, especially the dissolution of specialist management posts and the introduction of team or community librarianship without provision for specialist knowledge.

The statistical survey was supplemented by case studies of children's services in Bradford, Croydon, Dorset, Islington, Liverpool and Nottingham. These are fairly brief - some six pages each - and presented in a standard form with usually one paragraph on any services to schools.

This report, while providing interesting and generally sound data, presents no overall view of children's services, does not give enough detail to establish the 'good practice' referred to by the Chairman of LISC, nor to fulfil the OAL aim of promoting 'understanding of the range of patterns of service delivery' [p9]. In this connection it is strange that the authorities chosen for case studies provide only one example of a generalist approach to

staffing. Overall the report certainly fails to address the concerns of AMDECL and SOCCEL, which still remain as matters requiring research attention.

Nevertheless, the survey is important to anyone interested in School Library Services. Together with the LISU surveys, it provides statistical data for most of the 1980s. The information on Bradford is valuable, as it supplements that gathered in *School libraries on the move* and in the case-study programme of *School Library Services after ERA*.

4. Curriculum innovation

A high proportion of studies supported by The British Library within its user education programme relate to curriculum innovation, particularly to the relationship of such innovation to the school library. While these are not directly concerned with SLS, there is value in reviewing them here for the following reasons:

They illuminate the process of change;

They suggest methodologies with application for the present study;

They indirectly suggest the appropriate support role for SLS;

They stem from the same research community as studies of SLS;

Most are based on case studies and may assist the case study programme which forms a major component of School Library Services after ERA.

- 4.1 Two of the pieces of research were single-site case studies, the first being *Developing resource-based learning: one school's approach*, published in 1985^[29].

This book incorporates two reports, both dealing with the initiation and implementation of curriculum change in one school.

The first report, by Liz Thomson who was the Schools Council's representative on the project coordinating committee, aims to present 'an account of how a school began to develop study skills within and across the curriculum in selected subject areas' [p11] and to offer comments on issues which arose in the course of the project.

The second report, from Margaret Meek, aims 'to show and appraise the scope, variety and importance of the role of the librarian within the development of the curriculum' [p12].

The reports monitor change over the period 1981-1983, when one positive achievement was the re-designing of a study skills course, so that it was felt by both staff and students to have been successful. 'Perhaps the most significant shift for the teachers was from study skills in subject specialisms to learning skills within the curriculum. This came from the staff themselves, who

felt more and more that the notion of isolated study skills ran counter to developing ways of learning' [p24].

This history is of value to any study of the management of educational change, taking us through change initiation to change implementation but stopping short of change integration - indeed ending with uncertainty as to whether this will be achieved. It reinforces Fullan's view that those engaged in change need support in that process^[30]. Margaret Dane School, the subject of the study, is in Hertfordshire, a county known for the quality of its SLS, and it is unfortunate that we are not told the extent of support given to the project by that service.

- 4.2 A similar project, this time in an Essex secondary school, was reported in *The Learning School* in 1987^[31], which chronicled a new school's attempts to develop 'a whole school approach to information skills' [p3]. The interest in information skills at William de Ferrers School existed from the outset, since there was a dual-use library in the community centre of which the school formed part. This led the teaching staff to consider how best to use the resources in terms of materials and professional staffing available to them.

Lincoln acknowledges the influence of *The meaning of educational change* on his approaches to the staff, taking from Fullan the need to address the 'subjective realities' of the individuals engaged in change^[32], and ending with significant results. He concluded that 'while there are no ready-made blueprints for effectively teaching

information skills across the curriculum' progress was made. Among the conditions for that progress he cited:

The commitment of senior staff to information skills development;

Encouragement from outside school people acting in a consultancy role;

The commitment of teachers to learning, and the opportunity for them to reflect on their own practice;

The resources of a well-equipped and professionally staffed library.

During the project the school learnt much about the management of change, and found the truth of many of Fullan's observations on the change process. This strengthened a belief that staff engaged in change need strong support, not just through the attitudes of senior staff, but through 'peer interaction based on working relationships with colleagues and the cultivating of a dialogue about learning'.

The role of the library was treated in an appendix. From this one perceives that the librarians were confident in their contribution in traditional library induction programmes, but reluctant to go much beyond these.

Comparing this history with *Enhancing validity in action research*, the account by Hopkins of the dangers inherent in action research and the processes needed to enhance validity^[33], one can see that

the project did suffer from classic threats to validity - for example maturation processes within the organisation, loss of participants - and from lack of research expertise. But, in spite of these weaknesses, the report is helpful methodologically for others wishing to take note of participants' perspectives.

School Library Services after ERA is also concerned with the practice, as well as the theory, of change implementation. Although drawing on a wider constituency, it has much to learn from Lincoln's study which showed such varying results from one initiative. As the SLS role in information skills development is considered, the point that such skills 'cannot be divorced from the philosophical, psychological and socio-cultural issues of teaching in schools' [p 76/77] will be remembered. Most of the conditions for success identified by Lincoln (see p 33) have potential application to this study.

- 4.3 Two other research projects on the implementation of curriculum change were based on multi-site case studies. The earlier was reported in *Knowledge, information skills and the curriculum*, edited by David Hopkins^[34].

The project aimed to bridge the gap between traditional subject courses and new approaches to learning, and so to help teachers 'build a more integrated across-the-curriculum awareness of information skills' and 'become more literate in the language and ways of thinking of the information culture' [p1].

The project had two elements. The first was a review of research in the information skills field up to 1984, conducted in order to establish a definition of the term 'information skills'. The second element was fieldwork conducted in the Spring term 1984 in schools in Norfolk and West Glamorgan, and based around four curriculum initiatives spanning different age ranges.

The review of the research reports found that few were of help to teachers in defining information skills or developing information skills programmes in their schools. Exceptions were *Information skills in the secondary curriculum*, edited by Marland^[35] and Winkworth's *User education in schools*^[36].

At this point a concept of information skills was formulated. They were

about the higher-order skills of evaluation, analysis and synthesis of information, disciplined by the knowledge focus in which they occur [p23].

This theory provided the framework for the fieldwork, which explored how pupils and teachers react to this concept. Here, many problems were observed as teachers tried to put the curriculum initiatives into practice.

The conclusion is that any new curriculum initiative needs to be linked to both a theory of knowledge and a theory of instruction.

In terms of research methodology, the method of selecting schools for the case studies needs probing, as does the nature of these case studies. Were they nearer action research, especially as one fieldworker is described as a participant teacher?

Like the present study, this research was ambitious in scale, covering several cases. It serves as a reminder of the importance of initial research design, and of the need to maintain consistency across the different cases.

Again, the concept of information skills indicates that much work done by SLS - either in schools or via INSET - is too superficial. The implication is that potential change agents, such as SLS, should address curriculum delivery.

4.4 *Information skills in TVEI and the role of the librarian*^[37] is a study of a later curriculum initiative, the Technical and Vocational Education Initiative.

The project aims were two-fold:

To gather information on the extent of information skills teaching in TVEI;

To establish the role of school and college librarians in this provision.

Information was gathered by postal questionnaires to all TVEI coordinators and heads of SLS. In the second stage case studies were carried out in LEAs deemed to exemplify good practice.

Of the 30 SLS responding to the questionnaire 73% said that information skills materials and expertise formed part of their service provision: of these SLS 63% said that such provision was not being used by TVEI.

The conclusion was that, although the research identified pockets of exemplary work, these were isolated, uncoordinated. 'Rarely are they the result of coherent systematic attempts at cross-curricular innovation' [p34]. Both information skills and the library were found to be marginal to TVEI. Cross-curricular initiatives in secondary schools appeared very difficult to implement. The report ends with six issues crucial to the achievement of effective information skills practice in schools - which include the role of librarians - and suggestions for improvement.

The case studies show a wide range of library involvement in TVEI, with each case study highlighting a different strategy. All but one show SLS making an important contribution. For example, Bedfordshire promoted information skills through chartered librarians in schools, supported centrally by the SLS. In Clwyd SLS staff worked on a peripatetic basis in TVEI schools. In Hertfordshire there was considerable collaboration between the SLS and the TVEI coordinators. The TVEI unit funded SLS book

purchases, and library computers, while SLS challenge funds were used in some TVEI schools. In West Glamorgan TRIST funds enabled a teacher-librarian training scheme to be mounted by the SLS.

These insights into SLS are valuable, and the different perceptions of SLS staff and TVEI coordinators have significance beyond this project. They have particular interest to those studying the relationship between SLS and Education Departments, a relationship which *School Library Services today*^[38] revealed as sensitive.

- 4.5 It has already been noted that action research featured in the project at William de Ferrers school, as one element of the whole. For an example of a project run predominantly on an action research basis, one can turn to the *Teaching, Handling Information and Learning Project (THIL)*^[39], for which Jack Sanger was principal researcher and report editor.

The purpose of the project is set out in different terms in different parts of the report. The introduction puts it briefly as:

providing an overview of the information-handling strategies and needs of the developing learner [p2].

The overall methodology was that of qualitative research, with its emphasis on perceptions of inhabitants of a culture, the role of

participant observers and the deriving of theory from the findings rather than proceeding by initial hypothesis formulation.

The action research described bears all the hallmarks defined by Cohen and Manion^[40], i.e. it is situational, collaborative, participatory and self-evaluative.

Jack Sanger summed up the results as follows:

What THIL has done is to investigate basic classroom processes with a view to discovering what it is that inhibits or stimulates and broadens the pupil's capacity to handle information [p283].

Sanger's emphasis on the change which can be generated in the complex world of the classroom is slightly at odds with the philosophical chapter by Jack Schostak which shows

how the loop of traditional pedagogy gains ground over the aspirations of individuals, whether teachers or pupils, to explore and change it [p231].

It is interesting to look at this report in the light of David Hopkins' paper in *Collaborative inquiry and information skills*^[41]. Hopkins sees a need to move beyond the ideas of Kurt Lewin^[42], who regarded action research as a method of intervening in social ,

problems, to recognise that action research offers autonomy to the practitioner-researcher. He notes that the original purpose of action research was to free teachers from the constraints of pre-specified research designs, and so is opposed to a tight specification of process steps. However, Hopkins warns against an opposite danger, a lack of attention to method and theory.

Sanger's report is helpful to providers of curriculum support services - and so to SLS researchers - by its illumination of teachers' everyday concerns. Schostak's point about the strength of tradition may have application more widely, and will be borne in mind when considering the response of local authorities and SLS to imposed change.

5. Summary

This final section of the literature review attempts to draw together observations on the publications noted, and in particular their application to this study.

Fourteen items have been covered, and issues arising from them are considered under two headings: content and methodology.

Content An important point is the growth of interest in research in the school library field, as one can see by comparing Moore's survey^[2] with a later review *Perspectives on a partnership*^[15], which has a school library focus and covers 33 publications.

Several reports^[14,10,37] show SLS being capable of acting as significant catalysts for change. In this process the administrative base of the SLS matters less than its inherent strength^[20]. Questions, however, arise over SLS deeper involvement in curriculum innovation. Best^[10] clearly has reservations here, but Heeks showed, in reports of work undertaken in the BELL project^[19], that this can be achieved. Another example of a fruitful partnership is given in the case study describing collaboration in Hertfordshire between SLS and TVEI coordinators^[37]. We can see in the report on William de Ferrers School^[31] an opportunity for library cooperation in new learning approaches lost.

The imperfect nature of liaison between SLS and education agencies is referred to by several researchers. It surfaces in Best^[10] and appears again in the report on TVEI^[37] where we learn that of the SLS providing materials and expertise relating to TVEI, only 37% were finding these services used. Meanwhile, many SLS were unaware of the TVEI support available in their areas from LEA sources. Both information skills and the library were found to be marginal to TVEI, and it will be interesting to see how far SLS are seen as marginal to later education initiatives such as the National Curriculum.

A recurring theme in the reports is the gap between rhetoric and reality, and perhaps nowhere is this more apparent than in the area of information skills. Several researchers concluded that there

were misguided expectations of information skills^[29,31] or a lack of understanding of their true nature^[34,39]. Sanger's conclusions about the complex nature of information-handling, and the relation between information and knowledge led him to some strong criticisms of skills.

Over the last 10 years there has been a lemming rush for the cliff of skills education. We are at present over that cliff and into the sea where the complex meanings underpinning acts of teaching and learning are being drowned by the wholesale ascriptions of "skills" labels [p338].

Meek^[29] had similar thoughts. If we compare these perceptions with the kind of information handling programme offered by the librarians at William de Ferrers School^[31], we may be led to question the effectiveness of the information skills courses which have been a feature of many SLS programmes over the last five or six years.

The management of change is another recurring theme, and the influence of Fullan^[18] is apparent in several reports^[14,10,31]. Some of the conditions for implementing change became apparent: among these are opportunities for formulating one's own position, interaction with others involved and time for reflection. It is likely that these will apply to SLS as well as to schools. Some projects began with change initiation led by senior

management^[29,31]; two looked at change consequent on adopting some national curriculum initiative^[34,37]. At William de Ferrers development took place only when teachers took control of change, and Sanger^[39] allowed change to originate with the teachers. *School libraries on the move*^[14] reported on change initiated by SLS: it will be interesting to compare those approaches with the attitude to the changes imposed by legislation in the 1988 Education Reform Act.

Methodology

Maguire^[1] commented on the unfortunate divide, even conflict, between quantitative and qualitative approaches to research. The review suggests that this has diminished, with Best^[10] being able to choose an eclectic approach, allowing purpose to dictate a range of strategies. The deficiencies of the one-model approach can be seen in the quantitative work on the current state of library services to children and schools^[24,28], which would have benefited from some evaluative element.

Most of the projects reviewed were led by educationists, and therefore call on the research methodology of that discipline. Maguire^[1] commented on the problems faced by librarians in finding a discipline from which to draw research models, and on the difficulty of forging inter-disciplinary links. While some progress has been made, as the next chapter will show, the researcher with a library background may well feel isolated in the

present school library research community and perceive a problem in relating to models derived from education.

Recent research is characterised by an interest in methodology and certain recurring factors. Most report writers at least give some information on the methods chosen and the reasons for the choice. Many use classic strategies of qualitative research, such as catholic data collection, triangulation, systematic analysis of data. Some projects^[14,34] include a number of different elements, while others use new methods of data collection, such as questionnaires administered by telephone^[37], or fresh ways of dissemination^[20,37] such as videos and packs of training documents.

The attention to dissemination reflects The British Library's rating of the importance of this aspect of research. It is difficult to judge whether the gulf between research and practice has narrowed since Maguire's report^[1]. The adoption of action research approaches by Sanger and to a certain extent by Hopkins^[39,34] suggests a positive attempt to bring the two worlds closer together, yet one has to contrast the homely accounts by teachers with the highly specialised language used by both Sanger and Hopkins in their introductory or concluding sections and wonder how readers unversed in the language of research methodology will make the transition between the accounts of practice and theoretical statements. It is noticeable that the account by Howard and Hopkins of aspects of TVEI^[37] is kept deliberately

brief and non-technical in the hope of being read by practitioners. There is an ambivalence here which has not been openly discussed. One can contrast the growing interest among researchers in methodology with The British Library's statement^[4] that it is committed to supporting research which will have a practical value.

Several of the projects reviewed were built around case studies and here a number of questions arise. For example, how does one weigh the intensity of observation possible in a single-site case study^[29,31] with the variety offered by multi-site studies? Then again, the problem of control becomes greater with multi-site studies such as those reported in *Knowledge, information skills and the curriculum*^[34]. Care in design becomes particularly important, and this includes the selection of cases. Yin holds that every case 'should serve a specific purpose within the overall scope of inquiry'^[23], and this would seem an obvious requirement. It is therefore perturbing to read of authorities being case-studied because of their accessibility^[34] and schools being chosen by their willingness to participate rather than for reasons germane to the research. These problems in design and conduct of multi-site case studies will be borne in mind as methodology of the present study is considered.

Looking back at the research reviewed here, it is noticeable that most of it has been undertaken by educationists. Very little has come from qualified librarians. The methodology has therefore, naturally, derived from the field of educational research. In

these circumstances, while it may be natural for a study of SLS to follow suit, it will be sensible to investigate alternative models.

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CHAPTER THREE: METHODOLOGY

1. Sources
2. Type of study
3. Study elements
4. Tests of validity
5. Research design

CHAPTER THREE : METHODOLOGY

1. Sources

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SLATER, Margaret ed. Research methods in library and information studies. Library Association, 1990 [Sl].

YIN, Robert K. Case study research : design and methods. 2nd ed. Newbury Park, California, Sage, 1989 [Y].

These nine sources draw on research in both education and librarianship, with Rudduck spanning the two fields and Yin concerned with applied social research, as the table below shows.

Table I : Methodology sources

Date	Education	Librarianship	Social Sciences
1980	Cohen and Mannion	Busha and Harter	Yin
1985	Shipman		
1987	Ruddock and others		
1988	Sherman and Webb		
1989	Borg and Gall		
1990		Mellon Slater	

These nine sources are the ones which will be cited particularly in this chapter, using the authors' initials plus page number as a

simple means of reference. Together they offer a perspective spread over a decade and derived, whatever the title, mainly from traditions established in the social sciences. Some have a clear viewpoint which acts as the mainspring of the book; some try to provide a guide to the whole range of research methodologies; others contain papers from a variety of writers which offer specific insights rather than developing one line of argument. Many advocate more rigour and express a concern for validity.

In considering methodology one also turns to previous research. Going back to the reports surveyed in Chapter Two we see that the majority use a mixture of methods - for example survey, interview, observation - and that few adopt a wholly qualitative or quantitative approach. Indeed, one could even take the view that those studies which adopt a single approach are among the less satisfactory.

2. Type of study

The purpose of a study obviously has an influence on methodology. Here different experts have produced different classifications of purpose. Borg and Gall, for example, have identified four main types of knowledge generated by research: 'Description; Prediction; Improvement; Explanation' [p 5]. The fourth type of knowledge - explanation - is regarded by them as 'the most important of all in the long run', subsuming the other three.

If researchers are able to explain a set of phenomena, it means that they can describe, predict and control the phenomena with a high level of certainty and accuracy [p 9].

Jane Ritchie, on the other hand, identified five categories of purpose, each relating to a different research question:

1. Contextual or descriptive research : What's going on here?
2. Diagnostic research : Why does it exist or happen?
3. Evaluation research : How well does it happen?
4. Strategic research : What (if anything) should be done about it?
5. Contribution to research theory : generation of theoretical statements, at one level or another, about the social world [1].

Any specific piece of research may have more than one purpose, although it would probably be unwise for it to try to serve all.

The research questions already framed show that the study started with three questions, which can be summarised as:

What is the current state of SLS?

How is the 1988 Education Reform Act affecting SLS?

Why are specific choices being made from the options available?

These could fit into Ritchie's categories 1, 2 and 5, but for

simplicity it has been decided to define purpose according to the Borg and Gall categories as being essentially explanatory, which can subsume description.

The next matter to resolve, once purpose has been established, is the type of research one is carrying out, and here the different approaches of quantitative and qualitative research have to be considered. Table II summaries the characteristics of each.

Table II : Some characteristics of quantitative and qualitative research

Characteristic	Quantitative	Qualitative
Derivation	Physical and biological sciences	Social sciences, ethnography
Essence	Produces facts	Leads to understanding
Setting	Contrived	Natural
Role of values	Inquiry should be value free	Inquiry should be value based
Stance of researcher	Objective	Participant observer
Typical methods	Experiment, measurement	Observation, interviews
Design	Establishment at outset	Emerges as research progresses
Data analysis	By deduction	By induction
Sampling	Random	Purposive
Theory generation	Research begins with a hypothesis	Theory is grounded in the data
View of reality	Human characteristics can be generalized	Each subject is different
Form	Linear	Cyclical

How far these methods are in conflict or are complementary is still in dispute in some quarters. As long ago as 1946 Merton and Kendall were urging that the distinction between the two should be reassessed.

Social scientists have come to abandon the spurious choice between qualitative and quantitative data: they are concerned rather with that combination of both which makes use of the most valuable features of each^[2].

However old divisions take time to heal. Busha and Harter [B/H] writing in 1980, suggest no model other than that of scientific inquiry, while Marten Shipman [Sh p 7] in 1985 detected a swing from quantitative research, with radicals attacking 'the use of natural science methods that assumed a passive unthinking human as subject'. But, whatever theorists believe, practice may suggest less clear cut distinctions. The literature review in Chapter Two showed many studies using characteristic factors of both paradigms. This study takes particular note of the conclusions of Cook and Reichardt:

But while the debate has served a very useful purpose, it has also been partly dysfunctional. In large part, the way the debate is currently being argued serves to polarize the qualitative and quantitative positions and to foster the belief that the only available option is a choice between these

two extremes... The solution, of course, is to realize that the debate is inappropriately stated. There is no need to choose a research method on the basis of a traditional paradigmatic stance. Thus there is no need for dichotomy between the method-types and there is every reason (at least in logic) to use them together to satisfy the demands of evaluation research in the most efficacious manner possible^[3].

The point was reinforced by Rob Barrow more than a decade later:

The methodology adopted must be chosen in the light of the concepts being researched, rather than by some ideological commitment to a style of research^[4].

One can also see that, even when a particular model has been chosen, researchers may find amendments necessary. For example the ethnographical roots of qualitative research suggest intensive in-depth studies of particular cultures, with the realities illuminated over time, but, as Peter Woods points out:

In truth, however, there has been little "participation" in the sense of a researcher taking a recognized role within an institution^[5].

Then, too, much research in education or librarianship is not concerned with the whole culture, hence the rise of

anthroethnography for 'studies of relatively limited and specific problems and topics, the scope of which varies considerably'[6] and the development of methods of condensed fieldwork when only a comparatively short time can be allocated to case studies [R p28/29]. These offer themselves as models for the present case studies.

Looking back over the decade 1980-1990 when the nine research guides cited were published, one sees increasing acceptance that purpose should determine methodology, and that, whatever the model, validity and rigour should be paramount concerns. The shift from the either/or position regarding quantitative and qualitative paradigms, gives new emphasis to research design, for it opens up a wider choice of methods and calls for greater skill in bringing these together in one design. The growing freedom in adapting standard methodologies to serve specific purposes is countered by the discipline required to ensure sound findings.

Drawing from such insights, this study will be explanatory in purpose, eclectic in its overall choice of methodology. The case studies will draw specifically on Yin's recommendations, although recognising that some adaptation may be needed in the use of Yin's basically quantitative approach for a study with some qualitative elements.

3. Study elements

The study combines a number of different elements, each of which feeds information into the text - as Table VII illustrates.

Initial questions

The starting point of the research, as described in Chapter One, can be expressed in three questions. As already noted, these are:

What is the current state of SLS?

How is the 1988 Education Reform Act affecting SLS?

Why are specific choices being made from the options available?

This starting point is consistent with the decision to carry out much of the research through case studies. Busha and Harter comment that 'More often than not case studies are based upon research questions rather than hypotheses' [B/H p 153]. Yin moves further to suggest that case studies lend themselves particularly to the addressing of 'how' and 'why' questions [Y p 17].

Surveys

A survey is a typical method of quantitative research [B/G p 415], designed, as Yin notes, to answer questions such as 'what, how many, how much' [Y p 17]. A survey of SLS in England and Wales was carried out at an early stage of the study (Spring 1990), using a

postal questionnaire which achieved a response rate of 86%, supplemented by similar questionnaires for Northern Ireland and Scotland, with response rates of 100% and 74% respectively. The actual numbers distributed and returned is shown in Table III.

Table III : Questionnaire distribution and response (UK)

<u>Authority</u>	<u>Distributed</u>	<u>Returned</u>	<u>Percentage</u>
English Counties	39	35	87%
Inner London Boroughs	12	12	100%
Outer London Boroughs	20	17	85%
English Metropolitan Districts	36	27	75%
Welsh Authorities	9	9	100%
N. Ireland Education & Library Boards	5	5	100%
Scottish SLS Authorities	19	14	74%
Total	140	119	85%

The questionnaires were designed to supplement the statistical information available, and covered the variables considered important in a study of the effect of ERA on School Library Services, i.e.:

Structures; Policies; Service range and level; Relationships.

The questionnaires are reproduced at Appendix A.

Statistical analysis

To answer the question 'What is the current state of SLS?' some statistical information is required and fortunately this was available in 1989 through the publication of *Schools' and children's libraries in England and Wales 1987-1988*^[8] produced by the Library and Information Statistics Unit at Loughborough University (LISU). An updated version covering 1989-1990 was produced in 1991^[9] and in both cases an analysis of these statistics was carried out by Jennifer MacDougall, Loughborough University (see Appendices C and D). While there are questions about the reliability of certain of the 1987-1988 statistics - some of which were explored in *Journal of Librarianship* in July 1990^[9] - the second survey, published as *A survey of public library services to children and schools in England and Wales 1989-1990*, shows signs that these criticisms have been noted.

The LISU statistics are a unique record, being much more detailed than those on public library services to educational establishments contained in the annual public library statistics produced by the Chartered Institute of Public Finance and Accountancy. The analyses of the LISU statistics also provide information not available elsewhere - such as the percentage of SLS budgets spent on materials, the ratio of pupils to librarians and the proportions of non-professional and professional staff employed - and facilitate inter-authority comparisons and calculation of change over the two year period. As well as informing the present study,

they offer a model for producing comparative statistics on a continuing basis.

Case Studies

The survey and statistical analysis provided the main means of addressing the first core question of the study ('What is the current state of SLS?'), and the survey also went some way to answering the second question ('How is the 1988 Education Act affecting SLS?'). However, the survey did not provide sufficiently detailed information to answer the second question, nor was it appropriate for the third ('Why are specific choices being made from the options available to SLS post-ERA?').

From the outset of the study a case studies element was built into the design, largely because the two last questions (How?; Why?) lend themselves particularly to a case studies approach [Y p 17] and are suitable for both descriptive and explanatory research [Y p 15]. The decision to focus on contemporary events, and on explaining rather than controlling events [Y p 17] also led to the use of case studies.

At this point some definition of the term 'case study' is necessary, and here one notices variation in emphasis.

Borg and Gall

The case study, in its simplest form, involves an investigator who makes a detailed examination of a single subject or group or phenomenon... Some researchers consider case study, participant observation and ethnography as essentially synonymous [B/G p 402].

Cohen and Manion

The case study researcher typically observes the characteristics of an individual unit - a child, a clique, a class, a school or a community. The purpose of such observation is to probe deeply and to analyse intensively the multifarious phenomena that constitute the life cycle of the unit with a view to establishing generalisations about the wider population to which that unit belongs [C/M p 99].

These definitions assume an intensity of observation (and a single-subject focus) inappropriate to this study's purpose. The most fitting definition - both because of the parameters of the research and its attempt to use his methodology - is that offered by Yin.

A case study is an empirical inquiry that:

- * investigates a contemporary phenomenon within its real life context; when
- * the boundaries between phenomenon and context are not clearly evident; and in which
- * multiple sources of evidence are used [Y p 23].

All these conditions apply to the seven case studies undertaken in England and Wales for this study. The authorities to be used were chosen at the outset, not as a means of random sampling but for specific purposes. They are :

English Counties:	Cambridgeshire, Lancashire
Inner London Boroughs:	Kensington & Chelsea
Outer London Boroughs:	Hillingdon
Metropolitan Districts:	Birmingham; Bradford
Welsh authorities:	West Glamorgan

The basis of choice is given in Chapter Six and profiles of the participating authorities appear in Appendix F. Their involvement was negotiated via discussions held in 1989 (by telephone or in person), and all were visited in both 1990 and 1991, with most of the 1991 sessions taking place in the Summer term so that information gained was as current as practicable. Each visit occupied one or two days and was carefully structured. In each authority, two interviews were held with the head of SLS (1990 and 1991), and one with either the chief librarian or a member of the Education Department senior management team (1991). In all but one

case (Cambridgeshire) the facilities offered by the SLS were also observed, and discussions held with operational staff. Further telephone discussions were held in the Autumn term 1991, as necessary. Liaison was, therefore, maintained with the case-studied authorities over a two-year period, finishing at the end of September 1991. This knowledge over time was felt important for a study which aims to explain phenomena, to understand relationships between different agencies, and to discover why certain choices are being made from a variety of options.

The information on Northern Ireland and Scotland was also enriched by studies, of individual SLS, one in each country. Following a period of consultation, the Southern Education & Library Board and the Lanark Division of Strathclyde Region were approached, and both agreed to participate. Here again, two visits were made to each authority, supplemented by correspondence and telephone discussions. The interview framework was similar to that used in England and Wales.

Attention was paid in the case studies to the theory of symbolic interactionism, which holds that people react towards things on the basis of the meanings those things hold for them. Peter Woods' categories helped to build the interview framework.

Thus symbolic interactionists focus on the perspectives, through which people make sense of the world; the strategies people employ to achieve their ends; the different contexts and situations in which

they define their goals; their group cultures in which they interact; and their subjective, as opposed to objective, careers^[5].

Further details of the case study methodology are given in Section 4 of this chapter - 'Tests of validity' - and an outline of the structured interviews appears at Appendix G.

Link library services

While seven case studies in England and Wales was considered the maximum number practicable, it was recognised that it represents a very small percentage (6%) of the 116 LEAs. It was, therefore, decided that some additional contacts were desirable, and the concept of 'link library services (LLS)' was established. A further seven SLS in England acted in this capacity, some of them volunteers, who had asked to be involved in the study. To an extent, this introduced an element of action research.

Not all those who volunteered could be accepted, for the seven link library services were chosen carefully, to supplement or replicate certain characteristics of the case-studied authorities. A list of these LLS and their special features appears in Chapter Six, at Table XXX, but it will be helpful to note them here also.

English Counties:	Berkshire; Hampshire; Norfolk
Inner London Boroughs:	Wandsworth
Outer London Boroughs:	Havering
Metropolitan Districts:	Kirklees; Solihull

Liaison with them was maintained from at least April 1990. All were visited during 1990; three (Berkshire, Hampshire and Wandsworth) were visited again in mid-1991, while telephone discussions were held with the remainder in August and September 1991. The focus of interest was the SLS, but in all cases information was gathered on the authority and the parent department, and in four authorities the relevant chief officer, as well as SLS head, was interviewed.

The term 'contact authorities' is used as a generic term to indicate the LLS plus case-studied authorities. Together the contact authorities represent 12% of English and Welsh authorities.

Seminar programme

The seminar programme served several purposes. Partly it was a means of gaining understanding of the meanings held by current actors in SLS change; partly it was a means of exploring ideas generated in the first year; partly it gave participants from different backgrounds the opportunity to reflect and interact. The following list shows the scope of the programme.

London, 4 December 1990

Attended by representatives from The Library Association, The British Library and Her Majesty's Inspectorate, as well as the head of SLS in the case-studied authorities and link library services. A report of the seminar, entitled *Redirecting school library*

services : options and opportunities^[9], was produced, and many of the conclusions reached are reported in Chapters Six and Seven.

Belfast, December 1990

A morning seminar was held for Chief Librarians, to discuss the findings of the survey and their implication for Northern Ireland. The seminar was part of the preparation for a meeting between the Chief Librarians and the Department of Education, Northern Ireland (DENI). In the afternoon a seminar for Heads of SLS in the province and their senior staff was held, considering especially future service options.

Perth, March 1991

This one-day seminar was entitled 'School Library Services : the way forward' and was held with the assistance of the Scottish Library Association and the (then) LISC, Scotland. Participants included an HMI, a director of education, chief librarians, and SLS heads. An article relating to the conference appeared in *Scottish Libraries* in June 1991^[10].

Some sixty people attended these seminars.

Consultation

Representatives of over a dozen key agencies were consulted in the course of the study, a number of them on a continuing basis as part

of a process of testing and refining ideas. A list of these agencies appears at Appendix E.

In addition, other opportunities were taken during 1989-1991 to gather information and exchange views. These included the following:

Direction of two workshops for the Library Association in 1991, entitled 'Going commercial'. Each was attended by some 36 librarians.

Attendance at seminars organised by AMDECL and SOCCEL jointly in 1990 and 1991.

Attendance at the conferences of the School Libraries Group of the Library Association in 1990 and 1991.

4. Tests of validity

A basic requirement of any research is that it should be valid, i.e. sound, defensible or well-grounded. Consequently a number of tests of validity have been produced, some particularly appropriate to quantitative research, some to qualitative. Surveying the nine sources used to assist this study's methodology, one notes that the topic is considered by Borg and Gall [B/G 254-57, 404-6], Hopkins [R p 12-41] and Yin [Y p 40-45]. Hopkins is concerned with validity in action research, but all three sources offer valuable insights. However, given the aim to use Yin's methodology as far

as practicable, it is appropriate to use the four tests he suggests, i.e. construct validity, internal validity, external validity, reliability.

Construct Validity

Construct validity has been defined as 'establishing operational measures for the concepts being studied' [Y p 40]. Three tactics were adopted to achieve it, i.e.

The use of multiple sources of evidence, including interviews, collection of documents and direct observation of SLS. In order to obtain different perspectives, both the chief librarian, or relevant senior education officer, and the head of SLS were interviewed in all case studies.

Establishing a chain of evidence, through recording of visits, meetings etc, and systematic organisation of the study's documentation.

Paying attention to the accuracy of case study records, through processing notes within 48 hours.

Internal validity

This relates to the need to ensure that causal relationships are correctly attributed, for example in distinguishing between the changes for SLS which can be correctly attributed to the 1988

Education Reform Act and those caused by other phenomena. Attention has, accordingly, been paid to extraneous variables, which might distort results.

Yin proposes three modes of analysis of evidence which strengthen internal validity, and these have been applied to this study. They are:

Pattern matching: checking the results for a comparison of the predicted and actual pattern.

Explanation-building: an iterative process of building explanations, which entertains other plausible or rival explanations.

Time-series analysis: this technique was developed in quantitative research and involves measuring subjects at periodic intervals. In qualitative research it is a means of establishing trends over a period, and is well-suited to case studies spread over two years.

External validity

This refers to the degree to which findings can be generalized to the population from which the participants were drawn.

To improve the external validity of this study, a process of analytic induction has been used, involving the following steps [B/G p 404-5].

A hypothetical explanation of the phenomenon is formulated.

One case is studied in the light of the hypothesis.

If the hypothesis fits the facts it is tested against additional cases. Discovery of a negative case requires reformulation of the hypothesis.

In Chapter One (p 12/13) several initial hypotheses are listed. These were amended in the light of the survey results and with the help of the 4 December seminar.

The three hypotheses prepared for testing in the 1991 round of visits to case-studied authorities were:

ERA, although national legislation, is not having a uniform effect on SLS, but is being mediated by local cultures.

Certain common factors guide the management of a proactive response to ERA, even though structures and services may differ.

ERA is leading to new perceptions and measures of SLS effectiveness.

Reliability

This aims to reduce error and bias. One way of increasing reliability is to document procedures, so that they could be repeated by another investigator: this chapter and Appendix G are intended to assist such a process.

5. Research design

Mellon [M p 24, 25] offers the following diagrammatic outlines of the two basic research models:

Table IV: Outline of quantitative research process

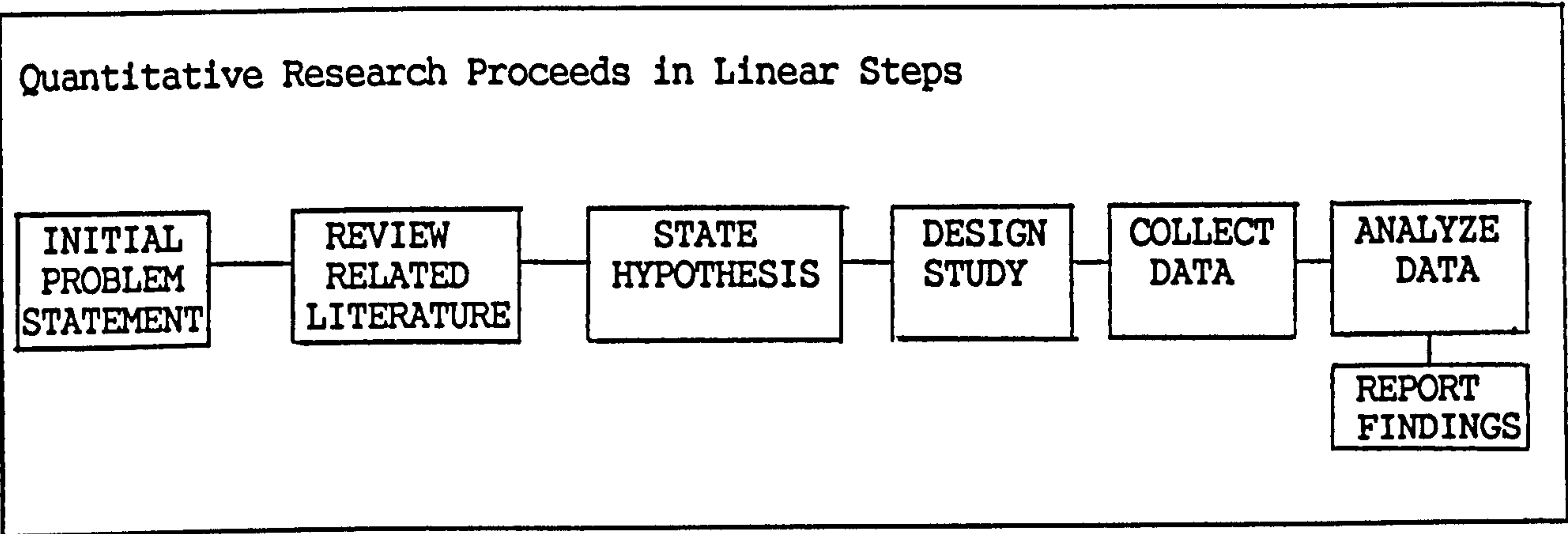
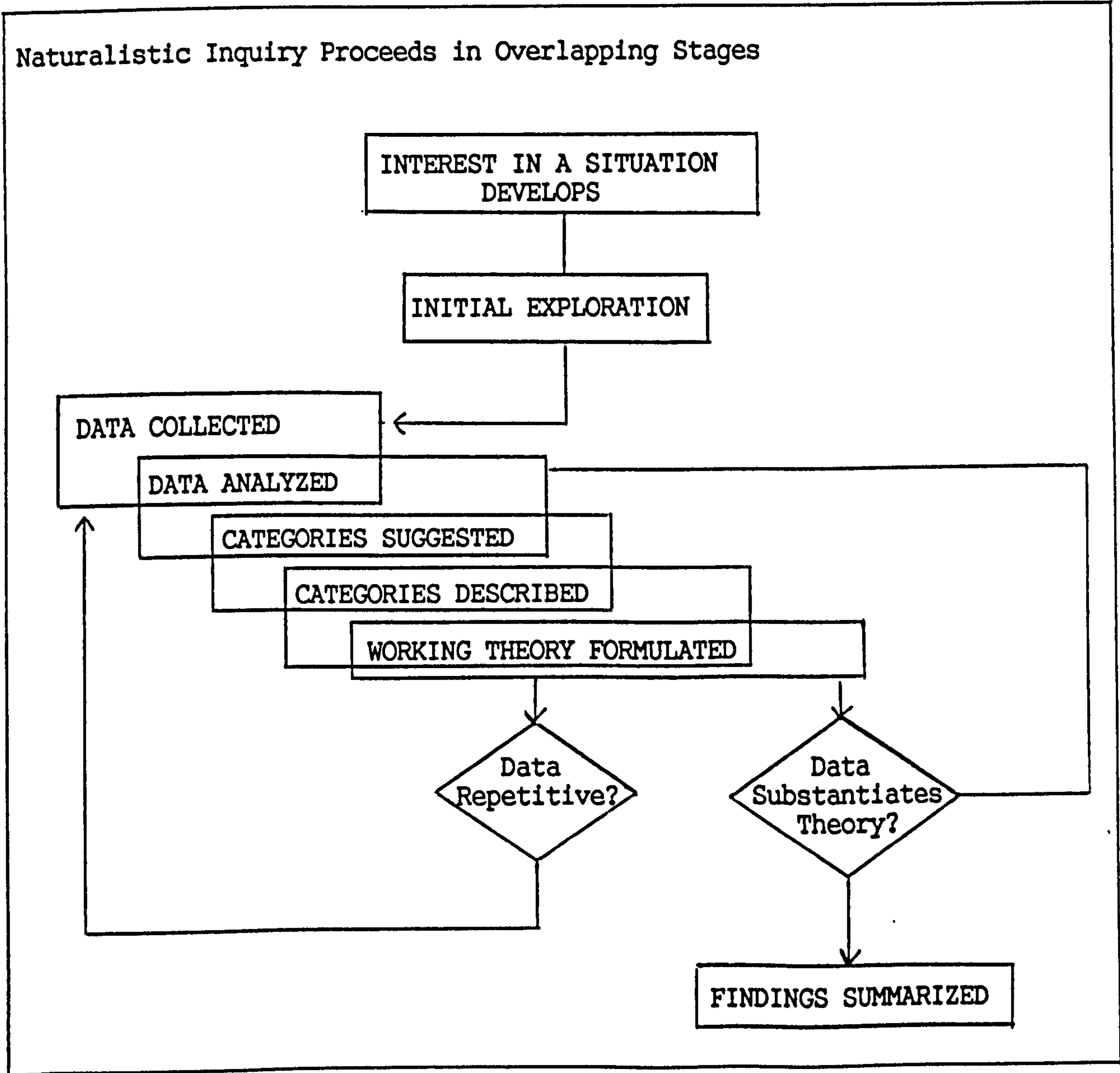
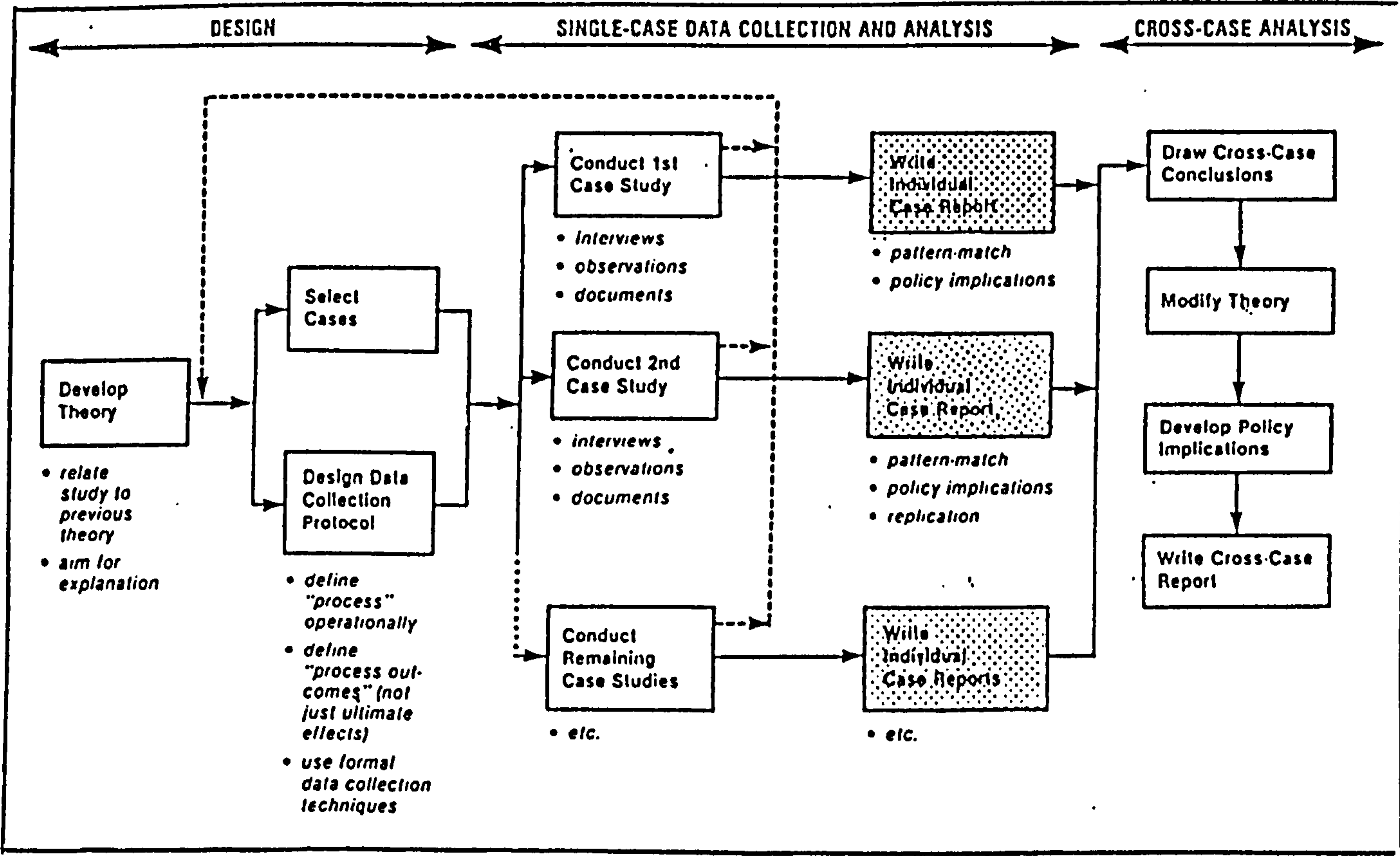


Table V: Outline of qualitative research process



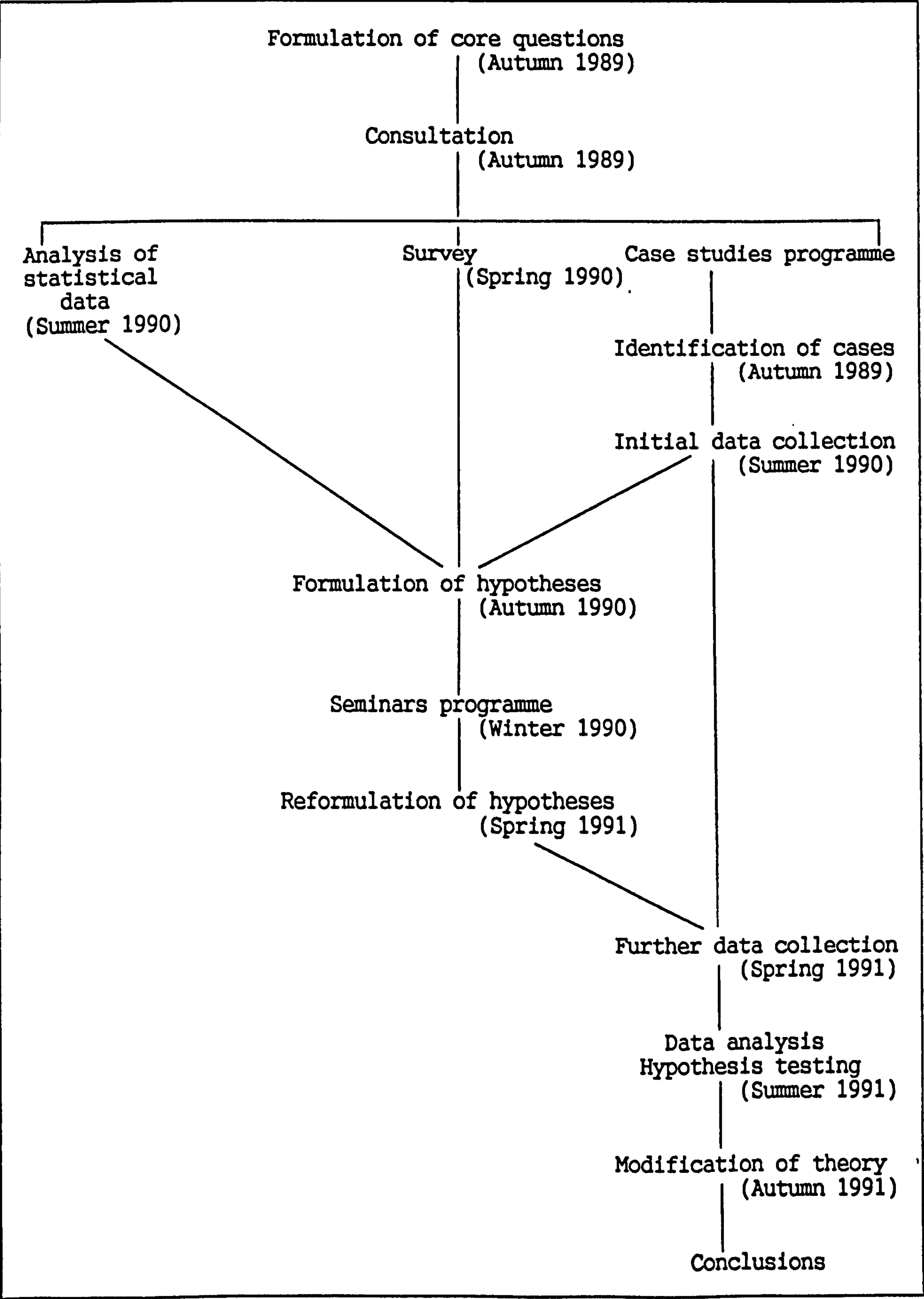
Yin [Y p 56] produces a model of case study research which shows both the complexity of the process and the way in which theory is formulated and reformulated in multiple-case studies.

Table VI: Outline of case study research process



It is this method, in essence, which will be the basis of the case studies of this research. However, as has been noted in Section 3 of this chapter, the research includes a number of elements other than case studies. Table VII illustrates diagrammatically the overall research design.

Table VII: Outline of SLS research design



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CHAPTER FOUR: THE CONTEXT OF CURRENT CHANGE

1. The School Library Service context
2. The education context
3. The social and political context

CHAPTER FOUR: THE CONTEXT OF CURRENT CHANGE

1. The School Library Service context

The contribution made to school learning programmes by SLS has been touched upon in Chapter One, but a closer examination of their background is required in a study which charts present change. There is, indeed, value in moving beyond immediate past history to the perceptions and emphases of much earlier years.

The nineteenth century

Among the pioneers in establishment of SLS was W.H.K. Wright of Plymouth who, over 100 years ago, realised the scope for co-operation between education and public library providers. Writing in 1889^[1] on 'Lending libraries and board schools', he tried to show:

how the active interests of these two educational institutions might become identical and that, by a combination of resources, much good might accrue.

He also grasped the need to circulate stock, thinking that the 100 books lent to each school should remain no longer than six months, and then for each set of books 'to go the round of the schools in rotation'. It is significant that he envisaged a sharing of expenditure between departments, with the School Board paying for accommodation, furniture and 'the attendance of responsible

officers', and the Library Department paying for books. However, although some principles were established then that still hold for today, Wright was not thinking of supporting school libraries, but rather of providing a 'system of small branch libraries', supplementing existing public libraries.

At this time the public library was clearly seen as an educational agency. John Ballinger in 1897 commented^[2].

What strikes one most in looking over the literature...is the general acceptance of the theory that the public library ought to, and does, occupy an important place in a well-ordered scheme of education.

What he failed to find, though, was a specific role for the library in practice. However he saw his own scheme at Cardiff, which brought older pupils to the public library for an annual visit, as pointing the way. Through that he concluded:

We are now building up for the public library a definite place amongst the educational agencies of our time.

We can observe the same type of work continuing today in class visits to the local library.

By the time of the Kenyon report of 1927 on public libraries in England and Wales there was 'active co-operation' between education and library committees in the maintenance of school libraries. The report states:

We have a record of 113 Public Library Committees which actively co-operate in the provision of school libraries.

In Cardiff - 'perhaps the most complete scheme' - loans to elementary schools averaged 500-750, those to secondary schools 1,000-2,000. Costs were shared and a joint committee, drawn from members of Education and Library Committees, plus head teachers, provided oversight. In Coventry the need for a static core collection, plus opportunities for exchange (the method most common today) was recognised and the funding arrangement most usual now was adopted. 'The Education and Library Committees co-operate closely, the former providing the money, and the latter the service.' The Kenyon Committee advocated that responsibility for school libraries should rest with the Education Committee, which would 'be wise in all cases to seek the co-operation of the Library Committee and the expert advice of the librarian. Where this is not done, it is clear that school libraries are often in a very indifferent condition'[3].

One year later the Hadow Committee, appointed to report on books in elementary schools, reinforced the value of such co-operation, and the economy of this type of provision.

General co-operation between urban and county libraries and public elementary schools is the most economical and effective method of increasing within the near future the total supply of books available for scholars in such schools^[4].

By this time the thought that this inter-departmental co-operation was natural, sensible and economical had been widely accepted. Lionel McColvin, reporting in The public library system of Great Britain in 1924, had a very different view.

He found:

Methods of catering for children are diverse, overlapping and confused. There are two systems of providing books for children - provision through schools and provision at public service points. Sometimes one, sometimes the other is preferred. Frequently both are operating in the same area...Sometimes both are supplying books: sometimes there is collaboration, sometimes not.

McColvin saw, as Wright in the nineteenth century, that the main justification for a SLS lay in the problems some children faced

because of a shortage of public libraries. The subsidiary justification was the availability of Government grants for provision via schools. To both he had a similarly robust rejoinder. More branch libraries should be built - if necessary catering for children only. Grants for service development should be made available to library departments.

After listing, at some length, the advantages and disadvantages of public libraries providing a schools service, McColvin concluded that, at least as far as general reading is concerned,

there can be no doubt that, unless geographical conditions prevent, children should be served in their public libraries and not in their schools.

This led him to a supplementary point.

We might well accept the general principle that (apart from schools books) all books for loan to children should come within the province of the public library, therefore, where children have to be served in schools...the service should be provided by and at the expense of the public library.

He proposed that staff from local public libraries should visit each school weekly to talk on books and book use. The division of responsibility was clear: school libraries should provide books

related to school work; public libraries should provide for their recreational reading^[5].

Today, McColvin's view of the school library seems a limited one, but his perception that the responsibilities of public library and education agencies need clarifying is helpful now as central government moves are requiring a reassessment of SLS.

1960-1980

The Working Party appointed in 1961 by the Minister of Education to study the standards required of the public library service included a section on 'Service to schools' in its Report, showing that this was a recognised part of public library work. The Report noted that:

most of the larger municipal libraries and all the county libraries in our survey provided books for schools on behalf of the education authority.

That service went beyond the supply of books and included their promotion via book lists and talks, instruction in book use, help in selection through exhibition collections, and special loans 'of collections of material (including illustrations) for school projects'. The conclusion was that:

It is apparent that both schools and public libraries stand to gain if there is effective liaison between

the two services, whether or not the public library acts as an agency for the provision of school books. This agency service, which normally supplements books held permanently by schools, seems to us an administratively useful arrangement^[6].

Here we have an overturn of McColvin's view that the public library should be the place where school students find their recreational or general reading, and an indication of the way SLS would develop. The responses to the Supports to Learning questionnaire to SLS in England and Wales show high priority being given to project loans, but also substantial activity in areas beyond book supply.

It was about a decade later, in 1973, that a blue-print for these support services was offered in another official document, The public library service: reorganisation and after, produced by the Libraries Division of the DES. This gave detailed consideration to library services to schools and provided a spur to development in the years following the reorganisation of local government in England and Wales. The Introduction expresses a positive view on the economies of scale effected by the reorganisation, which reduced library authorities in the two countries from 383 to 115. The larger units were seen as advantageous in facilitating 'the co-ordinated development of library services over wider areas', providing a greater range of stock, deploying specialist staff 'whose services the smaller units have not always been able to command' and making full use of information technology. It is interesting to compare the affirmation of the economy of large

units with current moves to devolved management and the advocacy by all political parties of smaller local government units.

The report's section on school libraries noted that most school libraries were provided for in two ways: by a capitation grant made direct to schools, and by a support service usually operated by the public library on an agency basis. It was for the education authority to decide:

what balance shall be struck between static collections in schools and freely available supplementary facilities on which schools may draw at their discretion.

The services commonly offered are set out, with the comment:

A comprehensive service to schools, which is highly desirable, should embrace them all.

There is value in listing these areas of service here, with the justification given at that time, for several are likely to be deemed too expensive to run in the changed circumstances of the 1990s.

A loan collection of books...a proportion usually being exchanged termly or annually

The value of a loan collection is that it provides an opportunity for periodic refreshment of the school library's stock and enables the school to obtain on loan supplementary material on curricular matters which is possibly too specialised to justify purchase for the permanent stock. It also makes it possible to broaden the scope of the school library into areas of general and popular interest on which the expenditure of limited school resources might not always seem justified.

Collections on specific topics to help with 'project work'

The provision of a special loan collection to help with project work is probably one of the most widely valued of the public library's services to schools, perhaps because of its clear relevance to curricular needs...It is important that they should be selected in conjunction with the teacher concerned, not pre-packed by the librarian.

The exhibition collection

The public library is better able than any commercial organisation to provide a permanent exhibition collection of 'best available titles' for consultation by teachers.

Publication of book lists and other bibliographical aids

Annotated lists of new books, or of books on particular subjects can be of value to teachers and school libraries in many circumstances...Nevertheless a great deal of effort can be needlessly duplicated in the production of similar book lists to meet similar needs in different authorities, and it is suggested that this is another service which might well be a co-operative undertaking...

Centralised facilities for book ordering and processing

Such arrangements enable teacher-librarians to spend more of their time on productive work within their school libraries.

The integration of the bookstocks of school and public libraries

It would be a small additional step to allow schools...to exchange (their own purchased books) at will for any other volumes obtainable from the public library's schools service. This facility...does ensure that books do not remain on school library shelves when their useful life in that school is over.

Services to teachers

Any school...should be able to call upon suitably qualified and experienced librarians in the public library service for advice and assistance on any aspect of the organisation of libraries...Other services...may include training courses and talks for teachers and teacher-librarians, advice on arrangements and routine procedures and practical assistance in exceptional circumstances - for example in the initial establishment of a library...There is a need for help not only in regard to the organisation of libraries, but also in regard to their use...[7].

Sheila Ray, writing in 1982, saw the large amount of space given to SLS in *The public library service: reorganisation and after* - 33% of the main text - as an indication of their importance. She, too, was clear about the value of these support services:

However, where a school library service does exist, offering a full range of help, supplying materials, advice and practical assistance, it should ensure a reasonable standard of library provision throughout all the authority's schools.

Ray's view was the then orthodox one, and assumed that services to children and schools would be directed by the same person.

Thinking had moved on just slightly from the 1972 report, as the following quotation shows.

The idea of a loan collection, changed regularly, merely supplementing the school's own resources, is gradually giving way to the idea of providing the whole stock for a school on a permanent basis...Where the concept of the loan collection still exists, this tends to be mainly of ephemeral and recreational literature, leaving the school to buy non-fiction related to the school's teaching programme.

It will be noted that this is exactly the opposite of Lionel McColvin's view that the local public library was the right source of children's recreational material.

Ray's guide is descriptive rather than analytical, and written at a time of overall confidence in the value of SLS and of gradual development of their role, especially the advisory aspect. One sentence, though, seems to speak particularly to SLS managers today as they face radical change:

However, there is no doubt that teachers and librarians are likely to make most use of those services which are available locally and this is the great strength of the school library service - it is local and can adapt itself to meet the varying needs of the schools in its area^[8].

It could be argued that it was during the period 1981-1988 that SLS began to move into a different service dimension. Throughout the decade interest in school libraries - especially those in secondary schools - grew. One can trace this partly to the secondary school library survey published by the Department of Education and Science in 1981, which set out clearly the poor state of these libraries in England and Wales^[9]. While over 75% of secondary schools did at least have a library, approximately one-third were open for only ten hours or less a week. In 69% of schools the library was staffed by a teacher with no library qualification: the average time allocated to these teachers in comprehensive schools for 11-16 year-olds was 3.5 hours.

This statistical survey prompted consideration of local standards and helped to pave the way for the setting up by the Office of Arts and Libraries of the working party which produced the report *School libraries : the foundations of the curriculum*^[10], to which reference has already been made. A survey reported in *School libraries on the move*^[11] shows 54% of SLS in England acknowledging this report as an influence on subsequent development. *School libraries on the move* describes SLS activity which went far beyond the traditional resourcing role and included formulation of authority-wide policies for school libraries, initiation of development programmes for school managers, launching of challenge-funding schemes to promote more effective school libraries and participation in collaborative pilot projects.

These years brought new posts for advisory librarians or advisory teachers with a library remit and also an increase in the number of professional librarians employed in schools, as comparison of figures in *School librarianship in the United Kingdom*^[12] and those in *Schools and children's libraries in England and Wales, 1987-1988*^[13] shows.

The growing interest in information skills also had an impact on SLS, which began to initiate or participate in related in-service programmes. Such moves were encouraged and practically supported by the appointment in 1985 of a liaison officer for the INSIS (Information Skills in Schools) project, based at the National Foundation for Educational Research and funded by The British Library. The increasing use of information technology in schools and school libraries also brought SLS into a leadership role in identifying suitable systems, setting up training programmes and in many cases providing pump-priming funds. The studies of individual authorities contained in *Information skills in TVEI and the role of the librarian*^[14] show the formative role played by SLS, while *Information technology and the school library*^[15] describes the major role played by Berkshire's SLS in a development project involving five secondary schools.

These years brought SLS into a new relationship with curriculum development, complementing the move of secondary school libraries to a clearer curriculum support role. *School libraries on the move*^[16] notes such development projects in nine case-studied authorities, with fuller description of Berkshire work, and *School*

libraries and curriculum initiatives^[17] provides examples from Derbyshire, Essex and the Central Region of Scotland.

It would be foolish to suggest that this change was general. The analysis given at Appendix C for 1987-1988 shows 19 services operating with fewer than two staff members, and a ratio of 50,000 pupils to one librarian not uncommon. In these circumstances the impact of the SLS on curriculum and school library development is bound to be severely limited. In a year when one might buy one children's book for £5, 66 SLS were spending less than £2.50 per pupil on materials, and 14 were spending less than £1.25. The review article 'School library support services'^[18], published in 1990 notes a range of disparities in service provision in this period.

Summary

The influence of the nineteenth century is apparent in SLS today. For example emphasis in many authorities is still on circulation of stock, either by mobile libraries or by the old method of boxed collections dispatched from a central point which survives in some areas. Then the place of the public library in the education system - and so of SLS within library departments - is still a matter of debate. Ballinger found this unresolved in practice in 1897 and current public library policy statements, structures and resource selection guidelines show that there is no general agreement as to whether the public library is an education or leisure agency. Where SLS are based in library departments - the

usual pattern in England and Wales - this conflict is reflected in differing views of the SLS. The report *Library provision and curriculum planning*^[19] even shows a division of opinion within a single SLS on the extent of its role in curriculum development.

Still, in the last decades of the twentieth century one can see that the relationship of SLS to services to children via public libraries is rarely clear and explicit. The usual practice in counties for one senior member of staff to have responsibility for both services provides a measure of coordination of work, but a policy distinguishing the aims of the two services is often missing. McColvin's comments on the ambiguity of the relationship still hold. His recommendation that loan collections in schools should be provided at the expense of the public library is of particular interest at a time when schools will, increasingly, be required to pay for services delivered by the SLS, but will continue to have access to a free public library service.

The history shows SLS moving through three stages. The first is one where the service was essentially a resource provider, giving access to a wide range of materials in a cost-efficient way. In this sense the SLS can be seen as having the benefits of a cooperative. The second stage is one which brought add-on services, such as displays, book weeks and other promotional activities, and support such as guidance on library design and administration. In the third stage SLS moved much closer to curriculum delivery through collaboration in national and local development projects, organisation of in-service programmes and

advice on formulation of learning resource policies. The 1987-1988 LISU survey^[20], with its questions on promotional and advisory work, shows that most SLS have reached the second stage, but contacts made during this study suggest that only a minority had moved by 1988 to the third stage. However, the development trend was clear. Just as school libraries recognised increasingly that their support to the curriculum should be clarified and strengthened, so did the leaders among SLS. By 1988 a significant number of SLS could claim, in a very real sense, to be 'supports to learning'. This is the background to the change for these services which took place 1989-1991.

2. The education context

It would be inappropriate in a study of school library support systems to give a long history of the education system of the United Kingdom, or even of education in the two countries, England and Wales, on which this study focuses. This section will offer, rather, an outline of the Education Reform Act and of other education developments of the 1980s which are still influential, with the overall aim of providing a context within which to place SLS change.

1980-1988

Looking back at the 1980s one sees change throughout the decade in both the curriculum and perceptions about the role of education.

One can trace two distinct trends, one liberal and the other controlling.

The first can be seen as having its roots in the 1960s when the institutional conditions for achievement of equal educational opportunities began to be developed through establishment of comprehensive schools and increased access to higher education. The Warnock Report of 1978^[21] and the Swann Report of 1985^[22] continued this move in respect of children with special needs and those from minority groups. Major curricular innovations of the 1980s such as the General Certificate of Secondary Education (GCSE) and the Technical and Vocational Education Initiative (TVEI) had a liberalising effect, offering new options in study programmes, giving more weight to course work, and more autonomy to students.

These changes were deep-seated, based on the ethos of the value of the individual, and drawn from the fields of educational philosophy, psychology and sociology. They are largely reflected in the educational aims for primary and secondary schools set out in *The curriculum from 5 to 16* issued by the Department of Education and Science (DES) in 1985^[23].

- * to help pupils to develop lively, enquiring minds, the ability to question and argue rationally and to apply themselves to tasks, and physical skills;
- * to help pupils to acquire knowledge and skills relevant to adult life and employment in a fast changing world;

- * to help pupils to use language and number effectively;
- * to instil respect for religious and moral values, and tolerance of other races, religions and ways of life;
- * to help pupils to understand the world in which they live, and the interdependence of individuals, groups and nations;
- * to help pupils to appreciate human achievements and aspirations.

At this stage LEAs had already begun work on drawing up authority-wide curricular guidelines, in response to DES Circulars 6/81 and 8/83^[24].

The curriculum from 5 to 16 goes on to comment:

In general these aims command widespread support and they are reflected in the aims drawn up by many local education authorities (LEAs) and individual schools.

The elements of learning were identified as knowledge, concepts, skills, and attitudes: the desirable characteristics of the curriculum as breadth, balance, relevance, differentiation, and progression and continuity^[25].

It will be noted that the DES at this time was giving regard to the views of local authorities, and the consultative approach is emphasised by the cover comment on the Curriculum Matters series.

This series of HMI discussion documents is intended as a contribution to the process of developing general agreement about curricular aims and objectives.

In other words, the curriculum developments which characterised these years of the decade, while stimulated by the DES, were ones in which the LEAs were fully involved.

A recurring theme in the LEA guidelines produced was the importance of process as well as content in the curriculum. It was manifest also in the change in teaching and learning styles encouraged by TVEI and the course work requirements of GCSE. The 'learning to learn' movement appears under many different names in this period - supported self-study; resource-based learning; flexible learning - but whatever the name it was a liberal movement, designed to give more responsibility to students and develop the skills needed for that independence. It was supported by Her Majesty's Inspectors (HMI) who, in a 1988 survey, drew attention to the passive nature of much school work.

However, in more than half the lessons seen in sixth forms, students spent a considerable proportion of their time as passive recipients of information;

little opportunity was provided for discussion or the interchange of ideas and they undertook little independent reading and lacked appropriate study strategies^[26].

Offsetting these liberal trends in education during the decade came a strong move towards central control. This trend had its roots in economic and political theories, and considered the needs of society rather than the needs of the individual learner. It will be noted that most of the educational aims set out above related to the individual but one looked to the need for a skilled work force, i.e.:

- * to help pupils to acquire knowledge and skills relevant to adult life and employment in a fast changing world.

This aim informed TVEI, the initiative which was not merely a means of enriching the curriculum but also designed to help prepare young people for the world of work, and was, significantly, funded by the then Manpower Services Commission rather than the DES. The Secretary of State's 1985 report to Parliament, *Better schools* described the Government's principal aims for education as:

first, to raise standards at all levels of ability;
and second, since education is an investment in the nation's future, to secure the best possible return from the resources which are found for it.

The White Paper went on to talk of the achievements of other countries, the economic opportunities available through the European Community, and the unemployment which was adding to the pressures of daily life.

Education should promote enterprise and adaptability in order to increase young people's chance of finding employment or creating it for themselves and others^[27].

The message was given with more urgency in the consultative document on the curriculum issued by the DES in 1987^[28].

We must raise standards consistently, and at least as quickly as they are in competitor countries.

During this period the DES was using a system of challenge grants in specific curricular areas (for example Information Technology) as a means of encouraging this raising of standards. In other words, through direction of funds the DES took greater control over development within LEAs.

In an article entitled 'From 1944 to 1988: Education, Citizenship and Democracy',^[29] Stewart Ranson charted a 'challenge to the post-war ruling order in education', developing from the late 1960s with attacks on the quality of comprehensive education and advocacy of a strengthened voice for parents.

This growing critique of post-war education focuses upon purported failures of achievement, on inadequate and distorted curricula, and the root causes of the problems - said to be the stifling control of professional bureaucracies... These failures of education, it is argued, derive from professionals and (local) politicians appropriating control of the service from its proper source - the parents.

The solution proposed by the Government was to take more control of education itself, with a corresponding loss of power by the LEAs. Power also moved from teachers to governing bodies and parents, at a time when the prolonged industrial action of 1986 and 1987 had alienated many members of the public from the teaching profession.

The 1988 Act grew, then, out of a period of cross-currents in education, with professional concerns manifested in curriculum innovation and political concerns expressed in greater central control.

The Education Reform Act 1988

This Act was the most important piece of educational legislation for England and Wales since the Education Act of 1944. Stuart Maclure summarised it in the following terms:

Not only did it strengthen the central government's role in education, it introduced important

limitations on the functions of the local education authorities, who were forced to give greater autonomy to schools and governing bodies^[30].

Most of the Act related to England and Wales only and it is to these sections, in particular those which may affect SLS, that attention is directed here.

The National Curriculum (Sections 1-25)

The National Curriculum applies to pupils aged 5-16 years in maintained schools and aims to be broad and balanced. It includes ten subjects of which three - English, mathematics and science - are designated 'core' subjects. The other foundation subjects are: art, geography, history, music, physical education, technology. At Key stages 3 and 4 (the secondary phase) a modern foreign language is added.

Four key stages, numbered 1-4, correspond to the ages 7, 11, 14 and 16. Attainment targets will be set in each foundation subject, based on what children would normally be expected to understand at these ages, and an assessment procedure established to measure performance against these national standards. Detailed results of assessments of individual pupils will be given to parents.

The Act provided for two Curriculum Councils - one for England and one for Wales - and a Schools Examinations and Assessment Council. The curriculum for individual foundation subjects is determined by

a complex procedure involving for each: compilation by a specialist working group, comment from the Curriculum Councils, consultation, decisions by the Secretary of State and the laying before Parliament of the final Curriculum Order. Delivery of the National Curriculum is to be monitored by HMI, school governors and LEA inspectors. To assist this process the DES made grants available from 1989-90 for appointment of an additional 300 local inspectors. Head teachers will be responsible for turning the national programmes of study into syllabuses and working timetables.

The intention is to produce greater curriculum uniformity, so making moves from one locality to another less disruptive educationally and emphasising the concept of pupil entitlement. The information given to parents is formalised and they are put more clearly into a consumer or customer role.

Open enrolment (Sections 26-32)

The power of parents as consumers was enhanced by the provision that all maintained schools should be required to accept as many pupils as their physical capacity allowed, 'the relevant standard number'. This is a great change from the Education Act of 1944 which required LEAs to organise education provision so as to make the most efficient use of resources and from the 1980 Education Act which was designed to reduce school provision in the light of falling rolls.

Maclure is not alone in perceiving that open enrolment would force schools to be competitive in a more direct way than falling rolls had done.

It was one of the main aims behind the Act to force schools to be more responsive to parents and attentive to their wishes. Open enrolment looks like an effective way of forcing schools to market themselves with more zeal than ever before^[31].

However, other commentators see much wider implications of these sections of the Act. For example, the Bristol Polytechnic Education Study Group suggested:

Yet, potentially, these aspects of the Act could make a significant contribution to a radical restructuring of the whole education system far beyond anything envisaged when the first Thatcher government came to power in 1979^[32].

Finance and staff (Sections 33-51)

These sections include the delegation of financial responsibility from LEAs to schools. While the Act refers to 'financial delegation' the term now in more general use is Local Management of Schools (LMS). Each local authority was required to prepare a scheme for financial delegation, and to publish annually detailed information on the funding of schools.

More details were given in the DES Circular 7/88, issued in September 1988^[33]. This envisaged that most LMS schemes would come into force from 1 April 1990, 'with full implementation of the delegation requirements in all qualifying schools with effect from 1 April 1993 at the latest' (Paragraph 4). Inner London authorities were given an extra year, with full implementation required by 1 April 1994.

The circular identified two categories of excepted items which could be deducted from the general schools budget and retained centrally: mandatory exceptions (which included central administration and advisory and inspection services) and discretionary exceptions. The principle of maximum delegation was to apply, but Paragraphs 65-95 set out items which the Secretary of State was prepared to consider as discretionary exceptions, and Paragraph 89 included a reference to SLS:

The list of discretionary exceptions given above is not exhaustive, although the Secretary of State will expect it to cover the large bulk of the expenditure which may be excepted by LEAs. LEAs will be free to propose in their schemes that other specialist central services, for example the schools library service and the schools museum service, should be retained centrally as excepted items where they believe that the needs of pupils overall will be met more effectively by this.

Initially, discretionary items were not to exceed 10% of the LEA's general school budget, but Paragraph 97 made it clear that further reduction would be required.

The Secretary of State will expect LEAs to aim for a target of reducing the total cost of their discretionary excepted items... to 7% of their general schools budget.

The DES was certainly making provision for SLS at this stage, since Paragraph 51 states:

The following costs are included within the general schools budget: ...

c) provision for the schools library service and the schools museums service attributable to schools covered by the scheme.

Grant-Maintained Schools (Sections 52-104)

The Act created a new category of schools, 'Grant-maintained schools' (GMS) which would be financed directly by the central government. Detailed arrangements were set down on the process by which schools could opt-out of LEA control and apply for grant-maintained status.

Individual sections of the Act show that the government was aware that some schools which the LEA was seeking to close or change on grounds of economy might seek independence, or that some might believe that the move would have financial advantages. Commentators, even at an early stage sensed some ambiguity.

Maclure attempts an answer:

How well off will grant-maintained schools be? The formal answer is that they are to be treated no more, no less generously than the schools in their locality... The actual grant which is paid to grant-maintained schools is for the Secretary of State to determine, using grant regulations some time after the passing of the Act^[34].

Flude and Hammer enlarged on these points in a 1990 publication^[35].

Education in Inner London (Sections 162-196)

The Act abolished the Inner London Education Authority and made the boroughs of Inner London responsible for education within their boundaries.

Summary

The liberal and controlling trends in education apparent throughout

the 1980s are also evident in the Education Reform Act. One can offset greater parental choice with a nationally-imposed curriculum, or the greater freedom for head teachers and governors with the loss of power by democratically elected councillors. The Act established non-democratic bodies, i.e. the Curriculum Councils and Schools Examinations and Assessment Councils, with major powers. As David Coulby put it:

The contradiction is actually between two components of the Act : while freedom is the justification for choice and differentiation at a structural level, freedom at the curricular level is to be dramatically restricted^[36].

Leslie Bash, in the same book, pointed to other contradictions, in particular the tension between proceeding according to market forces and according to planned policies^[37].

The Education Reform Act has met with a mixed response, partly because of the inconsistencies outlined above. Leslie Bash amplifies the point.

...the only sensible conclusion about the 1988 Education Reform Act is that it is a ragbag of measures. The one thing that it is not is a coherently planned, carefully considered piece of legislation. Therefore it is not surprising that some aspects of the Act might be viewed as

progressive by those who see themselves in the radical or socialist tradition in education^[38].

The new role of LEAs has been the subject of much comment. A general view is that the Act takes powers from LEAs. Gordon Cunningham summed up the position in a seminar organised by Capital Planning Information:

The most important consequence of the shift of power in the long-term however is the move towards the centre. Secretaries of State - and therefore civil servants - gain direct control over the education system partly at the expense of local education authorities and partly by the quite simple creation of new Ministerial powers^[39].

The Audit Commission attempted a positive view in a 1989 paper *Losing an empire, finding a role : the LEA of the future*^[40], while Ron Wallace, in a 1990 publication put forward the thesis that:

The real seizure of power is not by central from local governments, but centrally by politicians from professionals.

He went on to point out that

Local authorities may have less control over spending levels and less budgetary control...but they have

been given a much more powerful role in relation to the promotion of the curriculum and monitoring the work done in schools and colleges.

The new relationship between local authorities and their schools and colleges will be based on the need for the latter to prepare development plans annually, showing how staff are to be deployed, revenue is being spent, in-service training for staff is being planned, and academic standards are being monitored and raised. This gives the local authority a much more interventionist and influential role in relation to schools and colleges than they have previously had^[41].

Enough has probably been shown of the cross-currents within the present education system for it to be clear that SLS are subject to complex and sometimes contradictory influences and pressures.

3. The social and political context

It would be easy to devote a whole study to description of the wider social and political context within which SLS are currently operating. Such, however, is not the purpose of this study. This section is intended merely to indicate some aspects of that context which may need to be taken into account as the research progresses.

To a large extent the significant attitudes and values have been developing in England and Wales throughout the 1980s in what have come to be known as 'the Thatcher years', the years of Margaret Thatcher's term as Prime Minister. They include:

Value for money - which implies scrutiny of existing operations, possible redirection, provision for accountability and emphasis on quality.

Belief in a market economy - which produces more diversity of products and services, encourages an entrepreneurial approach, and promotes opportunities for individuals rather than social benevolence. The belief in a market economy has manifested itself in specific legislation, leading to compulsory competitive tendering for local authorities and a privatisation programme for major public facilities such as electricity, gas and water.

Customer consciousness - this follows from the market economy ethos, and is bringing a reorientation (at least superficially) in many public services. There is a new recognition of the need to market public services, and these services are looking at many of the practices of commercial companies, for example production of annual business plans.

The social and political trends in this country should be seen against the wider background of world change. Some of the implications for public agencies and commercial companies are discussed by Tom Peters in *Thriving on chaos : handbook for a*

management revolution. While this is written from a North American standpoint it offers much that has relevance to the United Kingdom and, indeed, to local government services here. Peters' thesis is that we should accept change as a norm and learn to thrive on it, meeting uncertainty

by emphasizing a set of new basics: world-class quality and service, enhanced responsiveness through greatly increased flexibility, and continuous short-cycle innovation and improvement aimed at creating new markets for both new and apparently mature products and services.

The speed of change required favours smaller units - a point which links with a move to devolved management within local government in England and Wales, and with suggestions by both right and left wing politicians that the basic local government unit should be at District rather than County Council level. Peters has advice on both future structures and products.

Interestingly, the winners increasingly share common traits. Most pronounced is the emergence of the specialist producer of high value-added goods or services, or niche creator, which is either a stand-alone firm or a downsized, more entrepreneurial unit of a big firm^[42].

This book might well be required reading for SLS managers. It was certainly recommended for teachers in a 1990 article 'The ever-changing charm of chaos'^[43]. Here David Hargreaves wrote:

I can't think of a book with a more apt title for teachers' summer reading. Schools have been told for years to learn from industry and business. The dangers are that schools are adopting yesterday's good practice in management. Peters is describing what is needed today and tomorrow. We can't rid ourselves of chaos, so let's learn to thrive on (not amid) it^[43].

Hargreaves uses Peters' book to expose some of the inconsistencies in the Education Reform Act, but his overall point is that local authority services cannot ignore wider social and economic change and would be well to learn from it in planning for the 1990s.

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CHAPTER FIVE: STARTING POINTS: SCHOOL LIBRARY
SERVICES 1989/90

1. Structures
2. Policies
3. Service range and level
4. Relationships
5. The effects of ERA
6. Perspectives from Northern Ireland and Scotland

CHAPTER FIVE : STARTING POINTS

This chapter considers the state of School Library Services in 1989/90, looking at structures, policies, service range etc., and drawing on three main sources. The first is a questionnaire distributed to library authorities in England and Wales, with a response as shown in Table VIII. Results are summarised in Appendix B.

Table VIII : Questionnaire distribution and response (England and Wales)

Authority	Distributed	Returned	Percentage
English Counties	39	35	87%
Inner London Boroughs	12	12	100%
Outer London Boroughs	20	17	85%
English Metropolitan Districts	36	27	75%
Welsh authorities	9	9	100%
Total	116	100	86%

The same questionnaire was distributed to Northern Ireland, and an amended version to Scotland. Both are reproduced at Appendix A.

The second source came from the programme of visits and consultation which supplemented this questionnaire. The third source was a statistical survey carried out by Loughborough University's Library and Information Statistics Unit^[1]. An analysis of core statistics on SLS from this LISU survey appears at Appendix D.

Although all Inner London Boroughs responded to the questionnaire, many were at too early a planning stage to be able to reply to all questions, and the bulk of the service descriptions included here are of SLS other than those in Inner London.

1. Structures

Leaving aside Inner London at present, most Local Education Authorities (LEAs) have a School Library Service, the exceptions being Surrey, Bromley, Liverpool, Manchester, Mid and South Glamorgan. Even in these authorities, though, there is an awareness of the value of some central support to individual schools. In Surrey a senior officer in the Education Department has an advisory and coordinating role. Teachers in Bromley get some help from local resource centres run by the Education Department. The remainder have framed proposals for a service. Even in authorities without official SLS one may find school loans available through branch libraries.

At the time when the project questionnaire reached Inner London Boroughs (February 1990) many had not completed plans for a School Library Service, but the table below shows the position then.

Table IX : SLS in Inner London Boroughs

i)	Service to be operated by the Education Department	(5)
	Hammersmith & Fulham Islington Lambeth Tower Hamlets Wandsworth	
ii)	Service to be operated by the Library Department	(5)
	Camden Greenwich Kensington & Chelsea Southwark Westminster	
iii)	Shared operation	(1)
	Lewisham. Education Department: Secondary school services Library Department : Primary school services	
iv)	Service operation not decided	
	Hackney	

Traditionally, School Library Services have been operated by the Library Departments of local authorities, as agents of the Education Department. Outside Inner London this was still so in 1989/90, exceptions being Newcastle-upon-tyne and Bradford. A 1987 survey of English services^[2] found 72% of School Library Services operating on an agency basis. Expectedly, then, costs are usually met from the education budget, but sometimes they are shared between departments and occasionally borne entirely by the library service.

In practice, when Library Departments are part of an education directorate or report to a sub-committee of the Education

Committee, these distinctions on budget or service base are of relatively little importance. However, such structures are becoming rarer. Once, library matters in most English Counties were dealt with by a sub-committee reporting to the Education Committee: the present study found a committee link with education in only ten English Counties (26%) and eight Metropolitan Districts (22%). This result is in line with a public library survey carried out in 1989^[3] which found that in 75% of the 139 authorities responding the title of the committee dealing with public library matters contained an arts or leisure element. It is also corroborated in a study by Margaret Kinnell.

Of the 143 responses there were over 50 variations of committee title, of which 51% were designated as either Leisure and/or Recreation... The relationship between libraries and leisure/recreation was therefore well established; structural links with education services appeared less significant.^[4]

It can be seen that while the link between Education and Library Departments had changed with new committee structures, the link between Library Departments and SLS was strong in 1989/90. It was reinforced by management models which, in most authorities, gave one senior member of staff joint responsibility for services to children and schools. Table X sets out the distribution of these joint posts and their status, according to the 1989/90 LISU figures. A number of authorities did not answer this particular section of the LISU survey, and percentages are of those responding. The last column shows the percentage of joint post

holders who are members of the departmental senior management team (SMT).

Table X : SLS senior staffing

Authority	Joint posts	Membership of SMT
English Counties	84%	90%
Outer London Boroughs	93%	93%
Metropolitan Districts	66%	86%
Welsh authorities	66%	75%

Several of the staff coordinating children's and schools work have wider responsibilities, a situation which obtained in 1986, when Jennifer Shepherd commented on the problems this may cause.

In seventeen of the forty-six shire counties of England and Wales the post holder has responsibilities for other services; administration, training, ethnic minorities, publications, special services - responsibilities not necessarily compatible with the role of service manager and school library adviser.^[5]

Such wider responsibilities and SMT membership help to integrate services to schools with the overall work of the Library Department, but they may also lead to tensions as services to schools require an increasing amount of attention. That demands

from schools were growing was a recurring comment in the questionnaire returns.

Two other sources of tension should be noted, both arising from structures which failed to clarify responsibilities of SLS managers. The number of authorities employing chartered librarians in schools had reached 59 by 1989/90, but in many cases the head of SLS had no formal management role in relation to these staff, a situation which was often perceived as uncomfortable or even inefficient. Similarly, several joint post holders had only an advisory role for children's work via public libraries, with the actual line of responsibility being from divisional children's librarian to divisional librarian.

Taking these together, one sees a number of structural problems or ambiguities. How far had the head of SLS, even when designated as a coordinator of children's and schools services, a management as opposed to advisory role for services offered through public libraries? What kind of role was expected vis a vis chartered librarians in schools - or what role was the most appropriate? Finally, how does one manage an education support service from within a different department? These questions will be returned to later in this chapter, in the section on relationships. The point to note here is that the structures within which SLS were operating in 1989/90 were seen as unsatisfactory by a number of those involved. While the almost uniform structural pattern - of SLS based in Library Departments but funded by Education Departments - was not breaking up, it was being questioned. Bradford SLS

actually made the move to the Education Department in 1989/90, several Inner London Boroughs chose an education base as the best model, and a few other authorities were considering it. A solution being explored by Suffolk among others was a split according to function, with advisory work moved to the Education Department and the resourcing element remaining with public library operations.

Questioning of SLS structures was set in a context of much greater change. The introduction of Compulsory Competitive Tendering, as required by the 1988 Local Government Act, and the move towards more entrepreneurial practices were both encouraging examination of departmental and committee structures within local government.

When the requirements of the 1988 Education Reform Act are added, it is not surprising that the study gathered many examples of radical restructuring within Education Departments. Not only were the exercises large-scale; they were also repeated as questionnaire and interview comments show.

Such a background has obvious implications for formulation of policy and the establishment of relationships, which will be considered in the later sections of this chapter. A major uncertainty which was already colouring attitudes in 1989/90 was the future of local government.

2. Policies

The past six years have seen many moves to encourage formulation of school library policies, and their value was emphasised in a 1985 report from HM Inspectorate.

Perhaps the most important step a school can take to improve its library is the fundamental one of formulating a policy for the library.^[6]

Practical help in the process was provided by a School Libraries Group publication, *Developing a policy for a school library*^[7]. Strangely, while SLS were busy promoting production of school library policies, few had developed a policy for their own services. This was perceived as an unfortunate gap by the compilers of the 1984 LISC report on school libraries, and one of its recommendations addressed the need.

To clarify the objectives of school libraries and the school library services and to establish a policy framework for them.^[8]

The research and development project, Berkshire Libraries for Learning (BELL) was set up to fulfil this recommendation and its main report, *School libraries on the move*^[9] contains an appendix which is, in effect, a draft SLS policy statement. The history of the BELL project showed the difficulties of establishing a policy for a service operated by one department on behalf of another, and the project's background studies revealed that only a minority of SLS were operating within clearly defined policies.

By 1989/90 there had been little change: less than one third of SLS in England and Wales (again omitting Inner London) operated within an agreed policy statement. Table XI shows the detail.

Table XI : Extent of SLS policy formulation

Type of authority	Statement formulated	Committee ratification	Policy in preparation
English Counties	16	7	9
Outer London Boroughs	1	-	2
Metropolitan Districts	6	3	6
Welsh authorities	2	1	2
Totals	25	11	19

Questionnaire returns and discussions suggest that the great motivator was ERA. The need to draw up policies on agreed service parameters and levels began to be recognised by both Education and Library Departments in the wake of the Act. The policy statements gathered typically set out service aims, specific functions and resource implications. Several bear a close relationship to the section on SLS contained in the 1981 publication *Public library aims and objectives*^[10].

Some policy statements for SLS set the service clearly within the context of departmental aims, as do the documents from East Sussex and Nottinghamshire quoted below. They provide an interesting contrast and together underline the ambiguity surrounding SLS allegiances.

Contribute to the corporate management of the County Library with particular reference to advising on and evaluating the needs of the Education Department for library services, as well as advising on new developments within the field of education.

(Extract from East Sussex policy statement)

To support the policies and objectives of the Local Education Authority by providing a professional support service to education officers, inspectors, headteachers, principals, teaching staff and students. This service to be delivered through the provision of high quality resources and a comprehensive advisory service on all library and resource related matters. (Extract from Nottinghamshire policy statement : 1988)

A third approach is shown by Wiltshire in a 1989 statement oriented to teachers' needs.

To provide a professional Library and Museum Service to all LEA teachers and school libraries in order to support and enhance the exploitation of the policies and objectives of the Local Education Authority.

Birmingham's SLS aims are incorporated in a 1987 policy document with a wider remit - *Library services to children and young people : aims and objectives* - and therefore looks to that client group.

1. To encourage children and young people to use libraries for information, education, leisure and culture.
2. To improve the quality of life of all children and young people in the city, and therefore, indirectly, that of the adults of the future.
3. To support BPL's policies, especially the aims and objectives and anti-racist policy.

These aims are then expressed in a series of objectives, each objective being followed by a list of related strategies.

Some so-called policy documents do little more than list the operations of the service - provision of project loans, advice etc. - and others show considerable confusion between terms such as aims, objectives, key tasks, strategies and work targets. Appendix H gives examples of statements drawn up or current in 1989/90, which together reflect the thinking of the period. The first is from Kensington and Chelsea, which became an education authority following the 1988 Education Reform Act, and is taken from a substantial education development plan, produced in February 1989. The second is from Nottinghamshire, and consists of a number of objectives and key tasks, related to the statement of aims already quoted. It also, uniquely among statements gathered, sets out a list of performance indicators by which service levels and quality would be monitored. The Suffolk statement of aims and objectives

was produced as an appendix to a review panel report on the future of the SLS. The introduction points out that ERA calls for a radical reassessment of SLS policy.

The most searching consideration of SLS aims and objectives arose through the Lancashire case study. Here the County Librarian, Michael Dolan, had written a thesis on the SLS as part of a higher degree requirement, and although it dates from 1987 the content is still relevant to 1989/90 and, indeed, beyond^[11]. It takes note of the Education Reform Bill, which was then under public discussion, of the local government environment generally, and of the interest in marketing strategies for public library systems, apparent from 1977 onwards in works such as Yorke's *Marketing the library service*^[12]. Dolan perceived that SLS objectives should be user-oriented, but pointed out some of the problems inherent in trying to satisfy the priorities of the Education Committee, the needs of schools and the professional agendas of SLS staff.

While official reports already quoted stress the need for a clear policy framework to service operations, discussions revealed some scepticism among practitioners as to the value of such statements. 'Policies make politicians feel good' said one; 'Policy statements have to be so bland, they end up meaningless' said another. One authority commented 'It is not our style to have one policy paper. We have a variety of policy statements/documents for a variety of purposes'. The head of a London service noted sadly 'Because of poll-tax capping SLS staffing is at half-strength, so it has been impossible to pursue many of our policies.'

There are obviously two different viewpoints on the value of policy statements among both SLS managers and the wider library community. The Office of Arts and Libraries is among the agencies encouraging greater use of formal management tools and has commissioned a series of manuals to support this process^[13]. The manual of public library objectives identifies key activities and provides a mission statement. It is advertised as including 'fundamental questions on the UK public library service which will guide individual libraries in determining their policy and operational objectives'^[14]. A valuable introduction to the terms used in policy setting and their hierarchy is contained in Brenda White's 1990 article 'Setting objectives for public libraries in the UK'^[15], which also contains a robust defence of the value of clear policies in times of uncertainty and change.

The public library, like its parent Council, has to be well managed to survive. The basis of good management is good planning. And the core of good planning is setting the right objectives.

This stance was rejected in a response by Eric Midwinter.

The preferred cyclical planning process has been lifted straight from the prescriptive corporate planning models advocated in the early 70s, in documents such as the Bains report^[16].

Supporting this view come works such as *In search of excellence*^[17] and *Thriving on chaos*^[18] which urge a much more flexible approach to managing.

Perhaps the point to remember is that policy should be a tool of management, not a brake, and a support to SLS in time of change.

As the Suffolk committee report put it:

Simply to leave the SLS on its present basis to react piecemeal to shifts in demand is unlikely either to be efficient in terms of resource use or effective in supporting quality in school libraries.

3. Service range and level

The project questionnaire did not ask for a description of current services, but observation, visits, and the LISU survey of 1989/90 show that most authorities provided loans of materials, and undertook some work which could be described as advisory, support or promotional. Table XII indicates the range found.

Table XII : Services offered by SLS

Loans of materials	: Long-term loans, usually in conjunction with an exchange system. Short-term loans for project work.
Advisory	: Advice on policy formulation, library management, library planning and refurbishment, development programmes.
Support	: In-service, central purchasing scheme, exhibition collections, book lists and bibliographical aids.
Promotional	: Book talks, book weeks, publicity, network development, information skills programmes.

The level of service, method of service delivery and budget, however, varied enormously. Chapter Four has already given a picture of the range of services current in the late 1970s and the new emphases emerging during the 1980s, as well as making clear the low level of provision in many authorities revealed by the 1987/88 LISU survey. This section will look in more detail at the types of work outlined in Table XII and will seek to establish whether any significant changes in service level are apparent from the two LISU surveys.

Loans of materials

There are two main types of loan, the long-term and the short-term. While the first LISU survey asked for details on the number of items lent in each of these categories, those statistics were never used in the published report. Turning to the 1989/90 report, one sees that the lack of a uniform base makes comparisons between authorities very difficult. Some authorities were unable to produce any loan statistics, some had ceased part of their service for a variety of reasons. Others did not distinguish in their statistical records between long and short term loans. Harrow reported that books sent to schools became part of permanent school stock. A few authorities provide project but not long-term loans, and at least one provides long-term but not project loans.

Turning to the project questionnaire, one sees that long-term loans were low in the priority ranking of SLS managers, being ranked as the most important service by only 6%. The rationale for this

service dates from the nineteenth century, as shown in Chapter Four. Now it is justified as offering an injection of fresh titles in a way which takes up little teacher time. However, professional literature does not show how far this reduction in teacher effort affected teacher enthusiasm for promoting the books. Nor did we have in 1989/90 comparative costings of different methods of service delivery. Usually there is some kind of exchange mechanism for long-term loans, with part or all of the collection exchanged once, twice or three times a year. The earliest type of exchange was via boxes of books, chosen by SLS staff and dispatched by delivery vans. Then came mobile libraries, typically staffed by a qualified librarian and driver/assistant. In the early 1980s, for reasons of economy and effectiveness, several authorities ended secondary school exchanges by mobile library: instead subject teachers were encouraged to exchange books whenever they wished at the SLS base, or advisory librarians found ways of introducing new books on their visits.

It is perturbing that some SLS are still content to deliver boxed collections, which can take no account of existing school stock or the changing needs and interests of staff and students. During visits, hard-pressed SLS staff were seen trying with difficulty to maintain delivery schedules, usually without pausing to consider the effectiveness of their work or alternative systems. Only one expressed doubts about this distribution method.

We are up to our eyes in boxes of books, and something has got to change. We can no longer justify our existence by heaving boxes of books around.

In contrast, there is no doubt of the popularity of short-term loans. Comments in questionnaire returns spoke of increased demands for these project loans from teachers, and SLS managers rated them high in importance, as Table XIII shows.

Table XIII : Service priorities of SLS

<u>Ranked first</u>		<u>Ranked first and second</u>	
Marketing	31%	Project loans	24%
Project loans	28%	Marketing	19%
Policy advice	13%	Advice on organisation)	13%
Reading promotion	7%	Bulk loans)	
		Policy advice)	
Advice on organisation)	6%	Information skills promotion	7%
Bulk loans)		Reading promotion	6%
Information skills)			
promotion			
Help in stock selection	3%	Help in stock selection	5%

A number of respondents reported that they were going to circulate a questionnaire to schools, to discover the customer viewpoint on service priorities - another consequence of Local Management of Schools (LMS). Others suggested that primary and secondary school perceptions would differ, and emphasised that primaries would give the project loan service very high priority. Two respondents

actually offered a second ranking from the school viewpoint and both, significantly, put project loans first, bulk loans second.

It is also interesting to look at the relationship between these two types of loan. The 1989/90 LISU enables us to compare the scale of activity in a high proportion of authorities. Table XIV takes just four examples from each type of authority, and it shows surprising variations.

Table XIV : Scale of loan services, 1989/90
(Figures rounded to the nearest thousand)

Authority	Items in loan collections	Items in project loans
Merton	6,000	8,000
Newham	65,000	38,000
Redbridge	71,000	47,000
Waltham Forest	4,000	27,000
Barnsley	11,000	31,000
Doncaster	30,000	61,000
Sandwell	68,000	54,000
Wakefield	108,000	42,000
Cheshire	161,000	219,000
Cornwall	113,000	29,000
Leicestershire	132,000	137,000
Somerset	142,000	227,000
Gwynedd	104,000	13,000
Powys	75,000	7,000
Rhondda	16,000	2,000

Note No further examples are available from Wales

Of the 15 authorities noted here, five lend most through project services, five most through loan collections, five lend similar amounts through the two channels.

It will be interesting to see the weighting given to different services in the Inner London Boroughs, which are just beginning SLS. A 1990 news-sheet from Kensington and Chelsea states:

The most urgent need is for a library of project loan materials... In the future we intend also to provide an exhibition stock of current materials to help teachers to select for their own libraries. Later still there will be a fiction and recreational loans collection. Another important feature of the Schools Library Service will be advice and practical help to schools.

In Wandsworth, service emphasis will be on project loans for primary and special schools and INSET programmes for their staff. For secondary schools, the Learning Resources team will support 'self-help' groups of school librarians and establish their training needs.

Keith Osborne, head of Cumbria's SLS, gave his views of service priorities in a telephone discussion.

In the end it's what the customer wants that matters, but when we ask them what service they value most, they say "All". If I were starting from scratch, I would start with an advisory service - including book displays and approvals collections, because there is a great need for teachers to be helped to sift the

best from each year's output. I wouldn't start with a loan service. Beginning with our objective of helping schools develop the most effective libraries, I would probably end with negotiating something different for each school. I certainly see a need to move away from the standard project collection of 30 books, and packs on the Vikings coming back from a school one term and going out to the same school the next. Do they serve as much more than class displays?

The very low level of provision in some authorities which has already been noted for 1987/88 persisted in 1989/90. There were still 19 SLS which employed fewer than two professional librarians. Still low levels of expenditure obtained in a significant number of authorities, distributed as in Table XV.

Table XV : SLS expenditure per pupil, 1989/90

Type of authority	Materials expenditure under £2.50	Materials expenditure under £1.25
English Counties	22	4
Outer London Boroughs	10	6
Metropolitan Districts	24	12
Welsh authorities	6	4
Totals	62 (1987/8 66)	26 (1987/8 24)

The same points already noted are borne out if one compares budgets and level of loans in the case-studied authorities in England and

Wales. The variation in budgets and workloads is considerable: some SLS still lack core management information.

Table XVI : Case-studied SLS, 1989/90

(Source: LISU statistics, apart from Bradford and West Glamorgan)

Authority	Prof libns	Ratio pupils/ libns	Total spent per pupil	Materials expenditure per pupil	Loan collection	Project loans
Cambridgeshire	6.3	15,404	5.59	2.30	347,503	240,745
Lancashire	14.5	14,732	2.49	1.26	143,732	135,055
Hillingdon	2.3	-	3.48	1.03	-	70,200
Birmingham	3.0	55,000	1.90	-	-	-
Bradford	6.8	11,915	4.17	1.48	65,866	191,722
W. Glamorgan	3.0	20,333	-	-	65,305	-

The figures do not show the proportions of total loans made to primary and secondary schools, but the questionnaire comments left no doubt that long-term loan collections, with their exchange opportunities, were valued most in primary schools and frequently perceived as irrelevant to secondary needs. While the bulk of project loans were to primary schools, they made a significant contribution to secondary schools, with growth reported as a result of TVEI and GCSE.

Advisory work

All except one Metropolitan District and one Welsh authority notified LISU that advisory services were provided to schools. The extent of such work is harder to determine, or the basis on which it is undertaken. West Glamorgan, for example, found

A basic problem is that we were set up without an official advisory remit, so we just go in if schools ask. We have managed to create an awareness in secondary schools of the kind of help we can give, and the level of demand has consequently risen.

Bradford was able to itemise the number of schools receiving advice in 1989/90 - a total of 179 out of 270 schools. This amounted to 67% of primary schools, 72% of secondaries and 25% of special schools. Cambridgeshire SLS gave advice to 337 schools, the total in the county, and in a 1989 paper notified schools that advice was available

For all schools, concerning specific needs such as the establishment and organisation of libraries and resource centres across the phases and the selection and purchase of learning resources.

An internal memorandum of the same date, however, included a more fundamental curricular role, the development of resource-based learning in schools.

- iv) advice to governors, schools senior management and the LEA about the development of resource-based learning in schools, including the appointment of Chartered Librarians in secondary schools and possibly for groups of primary schools;
- v) Provision of INSET workshops, seminars, etc.

This extension of advisory work can be seen in published documents of the period, designed to improve school libraries or develop library-related learning. Examples include Bradford's *The effective junior and middle school library*^[19] - produced with book trade support - , *Learning now : the Cambridgeshire experience in resource-based learning*^[20] and Wiltshire's *Making libraries work*^[21].

Chapter Four has already noted the growth in the advisory and developmental role of SLS 1980-88, and the questionnaire returns confirm that this continued in 1989/90. Problems mentioned include:

Lack of staff to meet increasing advisory demands.

Trying to cope with the everyday needs of the service, whilst giving increased support to Education (INSET, school reviews etc).

Meeting increased demands from schools for advice.

The question on priorities (see Table XIII) showed that advisory work, while not regarded as the most important service, had a high ranking.

Advisory work of a newer kind was set to grow by extra appointments financed through central or local funds. For example, Gloucestershire appointed a librarian to work in a group of schools to develop resource-based learning^[22], and Norfolk was part-way through a pilot project through which a Tutor Librarian worked cross-phase with a group of schools, with a specific information skills remit.

Support services

In the Table XII classification (p.134) these are identified as including in-service training of teachers (INSET), provision of a central purchasing scheme, exhibition collections, book lists and bibliographical aids.

All SLS provided INSET, apart from one Outer London Borough, seven Metropolitan Districts and five Welsh authorities. Over a third of SLS (36%) said that they were allocated INSET funds from the Education Department. Table XVII shows the range of programmes.

Table XVII : INSET programmes of SLS

Target group	Authorities
School librarians	72% of respondents
School library ancilliary staff	39%
Head teachers and deputies	38%
Subject and class teachers	67%

The scale of INSET programmes is more difficult to establish. Bradford made 704 visits to schools, of which 12 were concerned with INSET. Hampshire ran 55 courses and 145 other INSET activities; Cambridgeshire used 20 days for primary training, 15 for the secondary phase. Oxfordshire was part-way through an ambitious course, 'Information skills across the curriculum', mounted jointly with the nearby Westminster College. West Glamorgan had developed an extremely thorough training course for school and college librarians, which consisted of six modules, each lasting four days. This had been developed in collaboration with the county's TRIST programme. By 1989/90 most secondary school librarians in the county had participated in one of these courses. Some SLS reported involvement in training courses for school governors, in addition to work with teachers, while a few said that INSET activities had ceased because of reduced staffing levels. Table XVIII shows INSET involvement of SLS in the case-studied authorities.

Table XVIII : INSET activities of case-studied SLS

Authority	INSET funds	School librarians	Ancillary staff	Heads and deputies	Subject and class teachers
Cambridgeshire	✓	✓	✓	✓	✓
Lancashire	-	-	-	-	-
Hillingdon	✓	✓	✓	-	✓
Birmingham	-	✓	-	-	-
Bradford	✓	✓	✓	-	✓
West Glamorgan	✓	✓	-	✓	✓
Totals	4	5	3	2	4

It is of interest here to note that training in techniques for delivering INSET ranked high in the list of the training needs of SLS staff as Table XIX shows. INSET techniques emerged as fourth highest, mentioned by 15 respondents.

Table XIX : Training needs of SLS staff

Knowledge of current educational developments (especially ERA)	37
Marketing SLS	26
Information technology	18
INSET techniques	15
The resource implications of curriculum development	15
Management techniques (including time management)	14
Presentation/report writing skills	12
Financial procedures/service costings	7
Assessing school libraries	6
Change of role/relationships under LMS	5

Few examples of book lists were gathered in the study. They included simply produced Poetry pie lists from Hillingdon, where an adviser was collaborating in poetry promotion, Maths through stories from Dorset which was linked to Key Stage 1 requirements, and *Different voices : shared lives* produced for a multicultural reading promotion mounted cooperatively by two publishers, Eastern Arts and Essex County Council. A significant point is that all were linked closely to the school curriculum.

Exhibition collections were not news in 1989/90, perhaps because most are now regarded as adjuncts to a central purchasing scheme - a facility enabling schools to buy books via the SLS rather than using a bookseller. This opportunity was available in 42% of SLS, a percentage reflected in the case studies where just three

authorities of seven - Hillingdon, Birmingham and Bradford - provided a purchasing scheme. The trend, however, was difficult to discern. One SLS reported that it was 'running-down a sophisticated purchase scheme', others were contemplating starting a scheme. Two had decided to open school bookshops, which presumably would open the way to higher discounts. Some SLS reported a drop in demand since booksellers had been authorised to give schools a 10% discount. The possibility of cooperation with library suppliers in a selling operation was virtually unexplored.

Promotional services

Promotional services had been taken to include book talks, book weeks, publicity, network development and information skills programmes. The last two may seem to fit oddly in the group but have been included here as services which promote book use.

It was noticeable that the study showed that book talks and book weeks were low on the agenda of SLS managers, and this may be partly because such promotion has become almost routine. Where SLS staff visit the same schools on a regular basis, time is often allocated to sessions introducing new books. In book week programmes the lead in organisation may well be taken by individual schools, with the SLS acting in a supporting capacity, providing information on publicity sources and speakers, or supplying books for display. Then again, this type of work is often undertaken by the local children's librarian, while SLS staff concentrate on other service aspects. It is certainly labour-intensive and this

was recognised early by some authorities - Kent for example - as attempts were made to streamline SLS operations. Reading promotion ranked low in the priorities exercise, being the top priority of only 6% of respondents.

The mere circulation of books does, of course, serve to encourage reading, and some services in 1989/90 were trying to make a more positive link between book provision and classroom practice. Both Berkshire and Hillingdon had sets of fiction paperbacks, with six copies in each set, available for classroom use, and both reported the popularity of this scheme. There is a question here, though, which needs to be pursued as SLS look for new directions post-ERA. The extent of the SLS role in reading promotion has not been debated. The comments of a 1989 report are still valid.

While the past five years have brought attention - however inadequately - to the information resources of libraries, we have lost in the process a sense of the value of recreational reading, and of fiction in particular... One of the most effective ways of improving reading fluency is through encouraging recreational reading, and the need to do so remains as strong today as it did when the Bullock Report urged it in 1975^[23].

Curiously in view of the high priority accorded to marketing, few examples of publicity leaflets were gathered in the course of the study. Wandsworth's Curriculum Support Library was opened in March

1990, supported by modest but clear publicity handouts: West Glamorgan issued a User guide in booklet form to its Education Library and Resource Centre. Most of the leaflets received were poorly designed and poorly produced, and unlikely to enhance the status of the service. Two of the most attractive were leaflets on coated paper from Hampshire and Berkshire which used colour work or illustrations to very good effect. By July 1991 Berkshire SLS had decided that it could no longer afford the costs involved.

Network development was seen as a means of encouraging the sharing of information, expertise and resources, through the use of information technology. Little evidence was found of SLS leadership in this field, although SLS were clearly aware of the potential of computers for improving access to information. It is significant that information technology ranked third in the list of training needs of SLS staff: questionnaire returns showed that staff often lacked the expertise and confidence to promote information technology in schools. Authorities where such skill had been developed included Berkshire, which was encouraging new initiatives from 1985 onwards^[24], and Hertfordshire which had already participated in the 'Education 2000' project and 'Micros in schools' scheme.

One could also regard SLS as potential promoters of good practice and disseminators of news, but little awareness of this role was apparent. This is in line with the findings of Howard and Hopkins in *Information skills in TVEI and the role of the librarian*^[25].

Another issue is a lack of networking or dissemination of good practice. The pockets of exemplary work that we identified during our research were not linked to each other or to the wider educational environment. It is very costly to be continually re-inventing the wheel and we need to develop better systems for putting people in touch with each other and of disseminating good practice.

Nowhere was there a scheme to set alongside ACCESS PENNSYLVANIA, which brought schools into a statewide system of resource sharing by means of CD-ROM, and was led by the School Library Media Services Division of the Pennsylvania Department of Education^[26]. This project not only led to considerable increase in inter-library loans but resulted in most school librarians reporting 300-500% increases in internal borrowings by their own students and staff. It is hard to say whether SLS have failed to promote themselves as potential leaders and supporters of such initiatives, or whether information specialists have overlooked SLS. The question arises again as one reads the 1990 publication *Wider horizons : online information services in schools*^[27] which has only a passing reference to an SLS role in its conclusions and recommendations.

There was evidence, particularly from questionnaire replies, of a substantial and continuing interest in promoting information skills, even though this area of work came low in the priority rating of SLS managers. Quite apart from INSET programmes, nearly

half of respondents were engaged in promoting information skills with pupils.

Table XX : Information skills promotion

With secondary school pupils	43% SLS
With primary school pupils	45% SLS
With special school pupils	12%

However, probing of the content of information skills programmes showed that a high proportion were concerned more with information location than information use. It was not within the compass of this study to measure the effect of such SLS activity on students' learning. However, it is appropriate here to recall that the literature review in Chapter Two showed educationists emphasising the importance of the higher order skills and the need to integrate skills and subject work. The findings of researchers at the Cambridge Institute of Education suggest that progress nationally has been uneven.

Although our research has identified pockets of exemplary work the general conclusion must be that they are isolated, uncoordinated events that occur as a consequence of individual teacher/department/school or even LEA initiative. Rarely are they the result of coherent systematic attempts at cross-curricular innovation^[28].

Much the same conclusions were reached in a study of the effect of GCSE on information skills programmes.

Nevertheless, the picture overall remains more pessimistic. The questionnaire returns from the LEAs and SLS, though limited in number, indicate that examples of interesting practice in information skills and GCSE are not widespread^[29].

There is an irony here. The 1989 review, *Perspectives on a partnership*, had commented:

Reading the reports of the past five years, one is left feeling that we are now at the end of a distinct stage, and waiting for new momentum^[30].

The National Curriculum offered that momentum, yet the extra workload for SLS, brought about by ERA, prevented those opportunities from being realised.

4. Relationships

Relationships for SLS grew more complex as a result of ERA, as assumptions which had grown up over decades began to be questioned, and schools began to be seen in a new light, as customers who might or might not buy instead of as recipients of a free service.

As has already been noted, most SLS are based in Library Departments but operated on behalf of Education Departments, a complex situation which obviously makes for tensions.

The good news, coming through both in questionnaire returns and on visits, was that relations between Education Departments and SLS were improving. A 1985/86 survey by the Office of Arts and Libraries^[31] revealed frequent difficulties between Education and Library Departments, with several chief librarians citing relations with Education Departments as their main SLS problem. Case studies carried out for the BELL project in 1986 and 1987 found a basic question still unanswered.

Are school libraries the province of education or of library agencies? While some very fruitful relationships between Education Departments and Library Departments were perceived... there were tensions which might have been resolved had the status of the SLS been clearer. As one adviser put it: "The debate has been neither joined nor resolved"^[32].

Table XXI is an analysis drawn from the questionnaire returns, but to it one must add a recurring comment made by respondents: 'Liaison with Education is improving'. Some gloss on Table XXI may be helpful. The three authorities where liaison impetus came

mainly from the Education Department were Bradford, Surrey and West Sussex. In Bradford the SLS had moved to the Education Department, and in the other two authorities a senior librarian with a specific school library remit had been transferred to the Education Department. By a 'formal liaison structure' is meant a steering or advisory committee: some of these were long-term groups and others were appointed for a specific purpose.

Table XXI : Education/Library Department liaison

i)	Impetus for liaison	
	From the Education Department	4%
	From the Library Department	74%
	From both equally	22%
ii)	Formal liaison structure	
	Structure established	29%
iii)	Specific benefits/results from such a structure	
	Benefits/results achieved	78%
iv)	Liaison rating	
	Good	22%
	Fair	58%
	Poor	20%

Overall, no pattern emerged of a link between committee structures and liaison rating, although very positive relationships were reported in some of the authorities where public libraries were within a Directorate of Education. Table XXI and respondents' comments show that most of the authorities which had set up some formal liaison structure had found it beneficial.

A joint committee has just been set up, and already there's more interest created.

One benefit of a steering committee is that its reports raise awareness among council members.

While a formal structure was regarded as valuable in achieving specific benefits, it did not inevitably lead to good inter-departmental relationships. Of the 23 SLS with such a link only four rated relationships as good.

Table XXII sets out the situation in the case-studied authorities in England and Wales, including here the newly established Kensington & Chelsea service. It will be seen that it mirrors generally the national picture.

Table XXII : Liaison in case-studied authorities

i)	Impetus for liaison		
	From the Education Department	1	(14%)
	From the Library Department	4	(57%)
	From both equally	2	(29%)
ii)	Formal liaison structure		
	Structure established	2	(29%)
iii)	Specific benefits/results from such a structure		
	Benefits/results achieved	2	(100%)
iv)	Liaison rating		
	Good	2	(29%)
	Fair	4	(57%)
	Poor	1	(14%)

Several advisory or liaison panels were of fairly recent origin, their establishment showing yet again the influence of the LISC school libraries report.

Until 1985 there were no formal links with Education. No-one locked into the Education Department power structure.

Post-LISC we formed an advisory panel, but it is mainly a supportive group, endorsing proposed changes.

Liaison was, of course, not entirely dependent on committees, and several respondents emphasised the role of individuals.

Our CEO is very supportive, and a person who still manages to talk about education and children.

Relationships were poor until the recent appointment of an adviser with a library brief, and now there is someone to promote the service.

We have regular meetings with Inspectors and Advisors: we're privileged to be in that position.

One London Borough reported a hierarchy of contacts:

The Borough Librarian is the person who talks to the CEO, and the Assistant Borough Librarian deals with the Deputy or Advisers.

Personal liaison may be effective in moving on action, but it has obvious disadvantages.

We have suffered in the past year because the adviser with a school library portfolio retired and it has not yet been transferred to anyone else.

I would prefer to have better defined lines. There is no-one in Education who is taking an overview of our service. Liaison comes and goes according to people in post.

These quotations together suggest some of the complexities of the liaison between staff in Education Departments and SLS. There are a range of systems from formal committees and posts with designated liaison responsibilities to cultivation of cooperation over lunch encounters in the staff restaurant. Designated staff, moreover, are of many different kinds. The LISC report's recommendation on this point is somewhat ambiguous.

To designate specialists (sic) posts of Adviser and Inspector for school libraries and school library services^[33].

When we turn to the main text, though, the implication is that this post will be held by the SLS head^[34].

In 1989/90 some heads of SLS were treated in aspects of their work as school library advisers, but very few had that designation. Even in Bradford where the SLS had become part of the Education's

Advisory, Assessment and Support Service the title used was Principal Education Librarian. Quotations above and on p. 158 show that SLS staff welcomed an Adviser being given a school library responsibility, and information gathered on visits provides evidence of the leadership role in library developments played by English Advisers and TVEI coordinators.

Again, the complexity of relationships does not make for easy communication. Howard and Hopkins identified one problem in connection with TVEI programmes.

Another related factor is the general isolation of librarians. We found few examples of where they had been systematically integrated into TVEI or centrally involved with curriculum development in their schools. This also applied to the role of the SLS in LEAs. Where this integration has occurred effective developments have usually resulted^[35].

Howard's later study, *Information skills and the secondary curriculum*, while concluding that 'examples of interesting practice' are rare, did pay tribute to the support in implementing information skills programmes available in some areas.

This support has been in the form of close liaison between the SLS and Education Service and between those services and the schools^[36].

The problems surrounding cooperation which these two pieces of research from the Cambridge Institute of Education identified are

almost inevitable, given the widespread interest in information skills, and the different views on the term's definition. The point is illustrated by the experience of one SLS.

Information skills work is our really big area, but curriculum support teams are now doing a slot on information skills in schools and don't involve us.

Liaison between SLS and Education Department staff serves many different purposes and the LISC Report indicates the range of channels needed, including advisory and administrative staff, heads of teachers' centres etc.

Such partnerships are as essential here as they are within the school and we would therefore urge local education authorities to review their existing pattern of liaison with the school library service^[37].

Berkshire is an example of an authority undertaking such a review, and seeking new patterns. Some issues are the province of the strategic management teams of the Education and Library Departments, and are discussed at joint meetings. Termly meetings of senior SLS staff and Principal Advisers are used to exchange news and views. Matters such as service level contracts are initially negotiated by an Assistant CEO and the SLS manager.

The senior status of many SLS heads, and their wider management responsibilities within Library Departments have already been noted. But beneath that surface there were signs of movement and change, of dissatisfaction with old patterns and the emergence of new ambitions. Some heads of SLS, faced with growing demands from schools, began to see responsibility for children's services as an embarrassment. The expertise required of SLS staff moved from knowledge of children's books to knowledge of curriculum development, as Table XIX (p. 147) shows, and this too lessened the community of interest between children's and school services. While most authorities combined these responsibilities at senior level (see Table X), feelings and hopes often changed although structures remained the same. Bob Wilkes has written of having to decide 'whether Bradford's School Library Service flowed along as an appendage to public librarianship or was diverted into becoming purely educationalist',^[38].

Section 1 of this chapter has already recorded some of the frustrations resulting from the generalist approach to children's work which was a feature of the 1980s. It is not surprising that SLS staff began to see separation as a solution. In the words of one respondent:

We shall be working alongside Inspectorate colleagues
and maybe joining them in three years time.

A different kind of resentment began to grow in others, as service costings were analysed.

We're providing a lot for Education, and we could be using that money to improve our own service.

Education has had a cheap service for years. We have just made a charge to Education for the first time because of LMS.

Yet, just as some Library Departments began to distance themselves from services to schools, others began to increase their commitment to education in the wider sense. Often this was in the context of a new service plan. Bradford began a priority-setting exercise early, in a 1984-87 service plan^[39] which identified a need to improve support to informal education for both children and adults. Birmingham's 1990 document *Leisure Services Strategy* records that the 'commitment to "Open Learning" is currently one of the key features of the service nationally'^[40] and the subsequent restructuring of the department brought a new post at senior management level of Assistant Director, Children's, Youth and Education Library Services, with responsibilities which included 'support of formal and informal learning for people of all ages'^[41].

The growth of public libraries' involvement in informal learning has been charted in a 1990 publication *Open Learning and Public Libraries*^[42] which evaluated a Training Agency initiative. Significantly for this present study, both Birmingham and

Hillingdon were among the ten libraries selected for participation in the Training Agency project, and both saw it as integral to their core departmental objectives. This reaffirmation of the public library's educational role should not, however, be seen as stemming from SLS concerns. Rather, it arose from national encouragement to define core services^[43] and establish public library objectives^[44].

Schools and SLS

In some authorities schools had already become 'customers' or 'clients' by 1989/90, and there were more subtle changes in terminology, as in the authority which promoted its 'Library service for schools' as a progression from its former 'Library service to schools'. But whether the terminology changed or not, attitudes began to change - not everywhere and not always quickly. Customers buy goods and services, so these need to be costed. Customers have varying needs, so it is sensible to find out the range and scale of these needs. Wooing customers requires a marketing approach. The study found SLS at different stages in the process. Some were operating on an old paternalistic model, simply expressed by one SLS manager.

Let's be honest. We really do know best what schools need.

A few SLS had decided to survey school views.

We are looking at sampling customer satisfaction.

User surveys will be developed. A questionnaire is in the final stages of drafting.

One authority had tried and given up the attempt.

A survey was attempted but too few forms were returned to make it viable.

Another had decided to use methods other than questionnaire distribution.

We have had a programme of visits to heads of High Schools to receive comments and promises of support, and this will be followed by liaison with Primary heads.

One can perceive that a survey of school needs could be combined with the canvassing of support.

Kent was one of the earliest authorities to move to a market orientation. By 1989 it had already distributed a document on the support available through the SLS, had begun a costings exercise and some pilot schemes to try out new service patterns.

In many ways Kent has been exemplary in involving schools in SLS change through a well-managed system of information-giving and information-gathering^[45].

As SLS began to realise that their survival in the future was likely to depend on schools' opinion of their services, interest in marketing grew. Table XIII shows it as the element given highest priority by most SLS. However questionnaire comments show that marketing was usually equated with publicity. The quotation from one county is typical.

We need to improve marketing to get a higher profile for the SLS.

The idea of market segmentation was hinted at in a few replies.

We are reinforcing the importance of SLS to the whole education process, i.e. to LEAs and schools (staff, governors, parents etc).

We hope schools will react to market demands from parents for provision of learning situations to meet individual needs.

While views differed on the desirability of doing business with grant-maintained schools, there were no qualms of principle expressed about offering services to independent schools. The 1989/90 LISU survey asked two questions on such work - how many independent and grant-maintained schools are served; are independent schools charged. The summary of replies in Table XXIII makes surprising reading in times when SLS could see a charged service to state schools as a future possibility.

Table XXIII : Services to independent and grant-maintained schools

Type of authority	Service provided	Independent schools charged
English Counties	22	14
Outer London Boroughs	4	0
Metropolitan Districts	8	5
Welsh authorities	4	0
Totals	38	19

As SLS began to see schools as customers, whose patronage might depend on quality of service, some looked to find ways of measuring performance. Thirty SLS reported that they had established performance indicators, and they were in preparation in another twelve authorities, with distribution as in Table XXIV.

Table XXIV : Establishment of performance indicators

Type of authority	Indicators established	Indicators in preparation
English Counties	14	8
Outer London Boroughs	4	1
Metropolitan Districts	10	3
Welsh authorities	2	0
Totals	30	12

In spite of the interest, comments showed that much of this work was at a preliminary level.

We count the number of project loans per school and per staff member.

We keep detailed statistics on a range of work areas. From these we make assumptions or base our decisions. We keep questionnaires too.

We have informal targets for overall work patterns, and targets for project services.

Only one authority contacted in the course of the study had made use of the manual on the subject commissioned by the Office of Arts and Libraries, *Keys to success*^[46]. In general the manual was not only unused - it was unknown.

Some of the more sophisticated use of performance indicators had arisen through departmental or authority policies.

We are in process of establishing performance indicators as part of an authority-wide initiative.

Performance Indicators are an integral part of our Business Plans but these will be further refined as part of the process of negotiating the Service Level Agreements.

The history of SLS during the 1980s has shown them influential in development of school libraries, through LEA policies, training programmes, challenge-funds etc. In 1989/90 SLS were still concerned about school libraries, in particular their low status. However, increasingly SLS were seeing subject and class teachers as their main customers. Their support to learning was to classroom work. Bradford's *Annual Report of the Education Library Service 1989/90*, for example, recorded that 50% of teachers had made a visit during the year to borrow materials while the Curriculum Support Librarians had made 768 classroom contacts, leaving over 23,000 books. One can see that this kind of record brings widespread recognition of the service's value to teaching programmes.

While SLS started to perceive schools as their customers, some also found themselves in a very different relationship - taking an inspectorial role in school review programmes. School reviews had hardly got under way in 1989/90, but already SLS were wondering how to reconcile the two stances: a few (Suffolk, for example) were considering resolving the problem by splitting the advisory and resourcing functions of the SLS.

5. The effects of ERA

It had been expected that ERA would bring both opportunities and problems for SLS, with the National Curriculum providing some of the opportunities, and Local Management of Schools some of the problems. Interestingly, Table XXV shows that many problems other than LMS were facing School Library Services. Most authorities listed a number of problems, and one can see that many are inter-linked, forming a cycle of deprivation. For example, where the funding base is low, service can be only minimal, which results in an SLS with little impact on the schools: in such circumstances there is likely to be little pressure on education administrators and councillors to improve services and the funding base remains low. The core task, therefore - however defined - is to find a way to break this cycle.

Accepting, then, the close relationship between many of the problems facing SLS, it may seem artificial to attempt a classification. Yet there was sufficient distinction in the answers given to this section of the project questionnaire to make

Table XXV : Problems of SLS 1989/90

Subject	English Counties	Inner London Boroughs	Outer London Boroughs	Metropolitan Districts	Wales	Total
Balancing increased demands against a standstill budget	14	-	4	7	1	26
LMS : especially survival following LMS implementation	3	2	5	6	1	17
Low status of SLS, school libraries, books and reading	7	-	4	4	1	16
Poor accommodation for SLS	6	-	3	7	-	16
Relations with the Education Department	9	1	2	2	1	15
Insufficient funds for materials and equipment	-	-	-	6	7	13
Insufficient staff	5	-	2	4	2	13
Change factors : national and local	7	-	-	4	-	11
Political factors	4	1	1	3	-	9
Uncertainty	5	-	-	2	-	7
Recruitment of staff	2	-	3	-	-	5
Lack of professional librarians in schools; insufficient time allocated to teacher-librarians	1	-	2	-	1	4

the exercise valuable. Twelve specific problem areas were mentioned most frequently, with LMS ranking second and being mentioned by 17 authorities. Sometimes there was lack of information: 'We feel in the dark about the impact of LMS on our service'. Inner London Boroughs felt at particular disadvantage over the short gap between introduction of a School Library Service and financial delegation of budgets: 'We have a desperately short time in which to establish a valued service before LMS is introduced'; 'Our problem is marketing a completely new service and making it indispensable before LMS in April 1992'. For heads of longer-established services, too, LMS was seen as a threat to survival, and more active marketing a solution - but a solution bringing even more demands on hard-pressed staff. 'How do we find staff time to market the service in order to promote and thus preserve it in the face of LMS?'

Fears about survival following LMS came mainly from SLS in Outer London Boroughs and Metropolitan Districts, and there may be a relationship between such fears and low budgets.

Under the regulations in operation in 1989/90, up to 10% of the general schools budget of each authority could be spent on certain discretionary exceptions - among them the SLS - with a requirement to reduce this to 7% within three years. The services expecting cuts at the first stage of LMS were very much in a minority, but expectations at the second stage were very different. Table XXVI gives the detail.

Table XXVI : Cuts consequent on LMS

i) Cuts expected in first (10%) stage					
English Counties	Inner London Boroughs	Outer London Boroughs	Metropolitan Districts	Welsh authorities	Total
2	-	3	1	-	6
ii) Cuts expected in second (7%) stage					
English Counties	Inner London Boroughs	Outer London Boroughs	Metropolitan Districts	Welsh authorities	Total
12	-	5	6	5	28
iii) Effect of second (7%) stage not yet known					
English Counties	Inner London Boroughs	Outer London Boroughs	Metropolitan Districts	Welsh authorities	Total
10	-	3	4	-	17

LMS therefore presented a threat, but not an immediate one. It seemed that SLS might have a respite until the 7% stage, due by 1993 (or slightly later for Inner London). Only 35% felt confident that their budgets would not be cut then. This all seemed problem enough, but the subsequent history of LMS and other parts of the 1988 Act make this period seem relatively easy. The fears expressed were for the future and exacerbated by uncertainty. That uncertainty was deepened by the poor communication with Education Departments noted earlier in this chapter.

In these circumstances it is not surprising that change factors, both national and local, were listed as causing problems in 11

authorities. A recurring difficulty was one of time management, as authorities tried to respond to changes brought about by ERA while maintaining existing services: 'Devising new systems while running the old'.

In such a situation one solution is to initiate change, and one can see that several SLS did this, particularly aimed at making services more saleable. Ann Parker's comment, 'Not to change is not an option' chimed with the thoughts of many SLS managers. Others hoped that the fears aroused by LMS would evaporate. As one said 'We're keeping a low profile and hoping that we won't be noticed'. Here we come to a key question. Do School Library Services need to change as a result of LMS, even if their budgets remain centralised? To keep within the spirit of this section of the Act - which sought to give maximum choice in budget use to schools - the answer most managers were giving in 1989/90 was 'Yes'.

The effects of the National Curriculum were not being fully felt by 1989/90. Autumn 1989 had brought the introduction of Mathematics and Science at Key Stages 1 and 3, and of English at Key Stage 1. The most immediate effect was increased demand for Key Stage 1 science books, with several SLS reporting that their science shelves were nearly empty and that it was difficult to keep up with demand. The comment from one Metropolitan District was typical.

Demand for services has already doubled since the introduction of the National Curriculum. Lack of

growth will cause several problems in meeting this demand.

This leads us back to Table XXV which gives the main problem for SLS the balancing of increased demand with a standstill budget. Only 12 SLS reported receiving extra funds for the National Curriculum. While SLS managers were pleased to be recognised as an obvious source of support, several felt that the SLS had become too accessible.

Schools are completely unaware of the monetary value of our service and would get a shock if it was charged direct.

I think schools turn to us for convenience, without bothering to build up their own stocks.

HMI, reporting on the first year of English at Key Stage I, found that the National Curriculum had increased the demands made on SLS - and also noted that project loans were not always fully used.

Many schools had reviewed their libraries and often found them wanting. Many rely on their LEA's schools' library service (SLS) for topic collections, recent fiction of good quality and advice. With the introduction of the National Curriculum, most SLSs report a sharp increase in the demand for their services. Few schools had adequate collections of appropriate fiction, reference material, poetry and dictionaries in their libraries and in Key Stage 1

classrooms to support the National Curriculum entirely from their own stock. However, where teachers were able (often with the help of the SLS) to assemble collections associated with a current theme or with topic work, they did not always use the resources to their best effect. Such evidence suggests a further theme for in-service training.^[47]

Identifying the materials needed for the new curriculum created additional work, and a number of SLS reported that this was very time-consuming, with resources for some topics difficult to find. The resource implications of curriculum development ranked joint fourth among training needs of SLS staff (Table XIX), and in some cases SLS staff were collaborating with advisory teachers in workshops or selection sessions. Although the new curriculum is national in application, no evidence was gathered of national attempts to list relevant resources. In 1990 Peters Library Service issued a fourth edition of its catalogue *GCSE Support Material*, and noted that items were 'on exhibition display... alongside other specialist GCSE lists and National Curriculum Stock', but recognised that the National Curriculum lent itself less easily than GCSE to standard listing because of its wide subject and age coverage. The view of some SLS managers was that selection for any new educational initiative should just be part of core professional work. As one commented:

The National Curriculum isn't presenting any special problems. We have always bought according to need

and teachers are bringing their needs to us just as for GCSE.

In the development areas envisaged for SLS, resourcing the National Curriculum ranked low, as Table XXVII shows.

Table XXVII : Development areas for SLS

Development areas in order of frequency	
INSET	22
Advisory work	18
Marketing	15
Closer links with the Education Department	15
School review programmes	13
Add-on services	11
Policy/Costings	10
Information skills programmes	10
Central purchasing scheme	9
Resourcing the National Curriculum	9
Rationalisation of service	8
Extension of service	8

Development of information skills programmes ranked slightly higher, but was clearly not seen as a major objective. Where interest was expressed in skills promotion, this was not linked with the consequences of ERA in spite of professional exhortation.

The Library Association, in a 1987 response to *The National Curriculum 5-16* had already expressed perturbation that:

the consultation document on the National Curriculum 5-16 makes no reference to these important skills, or to the role of the school library in fostering the development of these skills.

It urged that:

Subject Working Groups should be alerted to the need to incorporate the development of study and information skills in their objectives and that the programmes of study should place some emphasis on strategies which allow pupils to actively engage in the learning process through participation in a variety of investigative tasks^[48].

Later analyses of reports of the National Curriculum Working Groups show that the acquisition and application of skills were recognised as important. Cambridgeshire's *Learning now*, for example, cites attainment targets, statements of attainment and programmes of study 'which specify knowledge and skills based on the use and understanding of sources of information'^[49]. Yet, however clear in theory the link between information skills and the National Curriculum, in practice the new curriculum did not lead SLS to a new wave of skills initiatives. Their energies were focused elsewhere, and mainly on ensuring their future in an uncertain climate.

Evidence gathered in the study leaves no doubt that ERA was already having a profound effect on School Library Services in 1989/90. It

had brought increased INSET work, participation in school review programmes, closer relationships with Education Departments, and moves towards a customer orientation. The Act found most SLS ill-prepared for a new commercial role. This chapter has noted the lack of clear policies, the mismatch between school priorities (resources) and SLS priorities (advisory work) and the very low level at which many SLS were operating. There were not only differences between authorities but also within them. Eight SLS reported that they had still to 'rationalise' services, i.e. provide the same range and level of service throughout the authority. Few had set an upper limit on school entitlements or considered other ways of re-shaping services to overcome the top problem of balancing increased demand against a standstill budget. A significant number of SLS lacked basic management information; very few had measures for judging service effectiveness.

It is reasonable to conclude that reassessment of the purpose, scope and operation of SLS was long overdue, and that ERA is providing the main spur for such reassessment. By 1989/90 old practices were beginning to be questioned, and change had begun, but the extent of the questioning and the answers reached varied enormously throughout England and Wales.

6. Perspectives from Northern Ireland and Scotland

Northern Ireland

On the face of it, the position of the School Library Service in Northern Ireland seems highly satisfactory, almost ideal. Administration of education and public libraries is through five

Education and Library Boards, so there is a clear structural link which should serve to strengthen cooperation. A School Library Service is a statutory service in each Board - a status which has long been urged in England and Wales. Within each Library Department structures are very similar, the SLS head serving as Assistant Chief Librarian in all but Belfast. The post is usually at second tier level, and carries responsibility for school and youth services. Belfast has moved fairly recently to separate these two roles, and the SLS there is headed by a Senior Librarian, Schools and Colleges. Overall, the picture at this period is of stable, traditional structures. Northern Ireland also benefits from guidelines on 'School library stock provision' issued by the Department of Education^[50]. Furthermore there is no artificial distinction between each school's library books and SLS stock, since the SLS is the provider of library resources. Schools select library resources within a given limit, and these are all supplied via the SLS. This means that all SLS operate a central purchasing scheme, and that comparison between SLS stock levels in Northern Ireland and England/Wales is a pointless exercise.

It is against this clearly defined, stable background that one has to view the effects of educational change, in the form of *The Education Reform (Northern Ireland) Order 1989*^[51]. The order is similar in its main provisions to the 1988 Education Reform Act, so we find additional responsibilities for Boards of Governors, establishment of a Northern Ireland Curriculum Council, proposals on financial delegation to schools, and plans for a Common (not 'National') Curriculum. This curriculum is expressed in 'areas of study', which include:

Creative and Expressive Studies;	English;
The Environment and Society;	Language Studies;
Mathematics;	Science and Technology

The actual number of subjects depends on pupil age. 'This slimmed-down version of the national curriculum', reported *The Times Educational Supplement*^[52], 'is regarded by civil servants and local education officers as a sleeker, more manageable, and therefore superior, Mark 2 model compared with the English and Welsh versions'. The Order requires schools to address also a number of educational themes, ie:

Cultural Heritage	Education for Mutual Understanding
Health Education	Information Technology

Each Education and Library Board has to submit to the Department of Education a scheme for the provision of advisory and support services to schools, and the Department's Inspectors will be asked to monitor and report on the scope and effectiveness of these services. One can see here the possibility of the HMI attention to School Library Services which has been advocated in England^[53] but has proved difficult given the Office of Arts and Libraries' responsibility for services operated by public libraries. Just what is the position of SLS under plans for financial delegation is far from clear. The draft guidance to Boards on Local Management of Schools^[54] states on page 7 that 'the general schools budget should include costs such as ... the school library and music services'; Annex B of the circular lists the School Library Service among 'Items which may be excepted from the Aggregated Schools Budget', and the 'per capita book etc allowance element' appears in

Annex C, 'Items which must be included in the Aggregated Schools Budget'. Here is an obvious challenge to SLS in Northern Ireland to identify more clearly the advisory aspects of their work, and cost these separately from resources provision.

Answers to the project questionnaire produced results very similar to those for England and Wales. Only two SLS have a policy statement, in one case agreed by the Education Committee, in the other by the Library Committee. Two SLS rate liaison with the Education Department as good (the same services as those with a policy); one rates it as poor. Two SLS have a formal liaison structure and see it as producing useful results. Performance indicators for the SLS have not been developed, but are in preparation in one Board area. Although none receive funds from the Education Department for INSET, all are undertaking this work, and most cover work with subject or class teachers and library ancillary staff as well as school librarians.

In the priorities section 80% listed 'Marketing' as top. Project loans - which came high for England and Wales - scored low (4, 5, 7, 7, 9), as did bulk loans, while 'Advice on library organisation' came second in importance for three SLS, and third for another. Just one SLS put reading promotion top.

In terms of training needs of SLS staff, problems and growth areas, responses were very close to those for England and Wales. Staff needed training in curricular changes, marketing and management techniques. Problems arose from uncertainty about the effects of LMS, low funding levels (or the spasmodic nature of funding), and the low priority accorded books and reading by schools.

Development was seen as coming through an increased advisory and INSET role, and through interest in information skills and information technology.

In summary, one can say that Northern Ireland has particular interest in learning of experience post-ERA in England and Wales, while the relatively simple monitoring of change in the five Board areas should be valuable to colleagues elsewhere in the United Kingdom.

Scotland

In some ways Scotland can be seen as leading School Library Service development. In England and Wales only a minority of SLS are based currently in Education Departments, but this number is growing as the numerous advantages are realised. In Scotland an education base is the norm. Education in Scotland is administered by Regional authorities and it is here, within the Regional Education Departments (or their Divisions) that most SLS are based. Again, in England and Wales only a minority of secondary school libraries are staffed by professional librarians, although this number, too, is growing. In Scotland professional staffing of school libraries has already been accepted as the norm. Lastly, unlike LISC (England) or LISC (Wales), LISC (Scotland) has produced case studies of SLS^[55], with specific recommendations on policy formulation and service evaluation, and the Scottish Library Association has also addressed the subject^[56].

One can also see Scotland as fortunate in having escaped major legislation on educational change and proceeding instead via more

gradual curriculum development. This development has taken place throughout the 1980s, built up through consultation and led by the Scottish Consultative Council on the Curriculum (SCCC). In 1988 a 5-14 Development Programme was announced by the Secretary of State for Scotland, aiming to achieve clearer definition of curriculum objectives, development of guidelines on programmes of study and attainment targets, and introduction of assessment procedures. Guidelines for headteachers, *Curriculum design for the Secondary stages*^[57] set out the national curricular framework within which education authorities and schools are required to work. In summary, one can see much in common with the aims and general thrust of the English/Welsh legislation, but with less rigid procedures. The focus of change is the curriculum, and Scotland is not at present involved in delegation of budgets to schools.

Table XXVIII provides a comparison by country of the questionnaire replies. As far as Scotland is concerned, one can see that it has escaped some of the pressures experienced elsewhere. So far, for example, there has not been pressure to develop SLS performance indicators; less than one third offer a central purchasing service or take place in school review programmes. The close association with education agencies is shown by the 64% of SLS which have been involved in discussions in curriculum development within the LEA.

As for problems and development proposals, these varied considerably, depending on whether the SLS was being operated at District or Regional level. In the former case, liaison with the Regional Education Department emerged as a recurring problem. In the latter, concern centred on improving libraries at school level, by appointing further clerical support in secondary schools or

establishing professional librarians in primary schools. Funding problems within SLS were more apparent in the District services.

Three subjects dominated development proposals: the development of a regional resource policy (mentioned by 29% of respondents); extension of information technology, eg for subject data bases, electronic mail; and closer integration of work with that of Education Advisers/curriculum planners. There was more evidence here than in England and Wales that Scottish SLS are responding to the national curriculum, for example through new study packs, cross-phase liaison and training programmes.

Overall, survival is the major concern for SLS outside Scotland because of the effects of LMS. In Scotland it is involvement in curricular change, a task made easier by the educational base the majority of SLS enjoy.

Table XXVIII : Comparison of questionnaire replies (United Kingdom)

Subject	England/ Wales	N.Ireland	Scotland
SLS policy statement produced	32%	40%	21%
SLS policy statement in preparation	24%	0%	36%
Education Department/SLS liaison rated very good	22%	40%	7%
Education Department/SLS liaison rated poor	20%	20%	14%
SLS involvement in school assessment programmes	33%	-	21%
SLS charged service to opted-out schools	39%	20%	14%
SLS performance indicators established	39%	0%	7%
Funding received for GCSE/Standard Grade support	20%	60%	42%
SLS information skills initiatives with:			
Secondary school pupils	43%	0%	57%
Primary school pupils	45%	40%	21%
Special school pupils	12%	0%	0%
Central purchasing scheme operated by SLS	42%	100%	28%
SLS allocated INSET funds by the Education Department	36%	0%	57%
SLS current INSET programmes for:			
School librarians	72%	100%	64%
School library ancillary staff	39%	80%	43%
Head teachers and deputies	38%	60%	7%
Subject and class teachers	67%	80%	28%
SLS training of public library staff	54%	20%	71%

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CHAPTER SIX: NEW SERVICE PATTERNS FOR SCHOOL LIBRARY SERVICES

1. External change factors
2. Structures
3. Policies
4. Service range and level
5. Relationships
6. Perspectives from Northern Ireland and Scotland

CHAPTER SIX : NEW SERVICE PATTERNS FOR SLS

While Chapter Five drew on information gathered from SLS throughout England and Wales, this chapter and succeeding ones concentrate particularly on the seven case-studied authorities in those countries. A profile of each appears at Appendix F, but some indication of the basis of choice is appropriate here.

The overall aim was to select a cross-section of authorities which had reached varying stages of development. Together, the case-studied authorities cover a large population range from Kensington & Chelsea (150,000 population) to Lancashire (1.4 million), and the main types of Local Education Authority, including an Inner London Borough (Kensington & Chelsea) which assumed an education responsibility as recently as April 1990. One SLS (Bradford) was already based in an Education Department when the study began, one (West Glamorgan) operated from an educational centre. Table XVI has already shown the variation in funding, from £1.90 per pupil (Birmingham) to £5.59p (Cambridgeshire) and in the ratio of professional staff to school population. Table XXIX summarises some of the other differences at the study's outset.

Table XXIX : Features of case-studied authorities (England and Wales)

Authority	SLS head	SLS bases	Special features
Cambridgeshire	County Librarian	3	Authority pioneered delegation to schools. Pilot scheme for chartered librarians in schools.
Lancashire	Joint post	14	Plans to separate children's and school services.
Hillingdon	Joint post	1	Strong departmental emphasis on educational role.
Kensington & Chelsea	Joint post	1	Newly established service post ERA.
Birmingham	Joint post	Branch-based service	Atypical service operating on a small budget. New Director of Libraries appointed 1989.
Bradford	Education Department staff member	2	A leader in school library development 1985-1988.
W. Glamorgan	Joint post	1	Notable for TVEI links. The subject of a 1987 SLS evaluation.

The methodology adopted has already been explained in Chapter Three, and an outline of the structured interviews held during the second round of visits to case-studied authorities appears at Appendix G.

As has been noted in Chapter Three, seven 'link' library services (LLS) in England also contributed throughout the study.

They were chosen partly because - with the exception of Solihull - they reflected the situation of case-studied authorities, and partly for individual characteristics. Table XXX indicates some of the latter.

Table XXX : Features of link library services

Authority	Special features
Berkshire	High financial base. Grant under PLDIS on pay service to independent schools.
Hampshire	Unusual in having no project service. Strong on advisory and promotional work.
Norfolk	A Library Department with considerable change from a low financial basis. Pilot scheme for Tutor Librarian to develop information skills in a cluster of schools.
Wandsworth	New service, operated as part of the Education Department.
Havering	SLS supplies all books for school libraries, receiving direct the relevant capitation allowance. A scheme to appoint professional librarians to all secondary schools has just been completed.
Kirklees	High level of activity with emphasis on project loans and boxed collections.
Solihull	SLS operating from low budget and staffing levels, but seeking radical development.

It is considered fortunate that so many authorities were willing to participate in the study, and that they did not require anonymity. The large number contributing did increase the complexity - not least of the terminology - and the following terms were adopted for ease of reference.

Case-studied authorities The seven authorities studied in England and Wales.

Link library services The seven authorities in England which also assisted the study.

Contact authorities All 14 authorities in the above two categories. A full list appears at ^{Table xxxvii (p.233).} ~~Appendix E~~.

The perspective from Northern Ireland and Scotland was obtained partly by supplementary studies of the SLS of the Southern Education & Library Board and of the Lanark Division of Strathclyde.

The seminar programme, described in Chapter Three, also informed the study, as did participation in conferences. Those included The Library Association's conferences of 1990 and 1991, and conferences of the Association's School Libraries Group (1990 and 1991) and Youth Libraries Group (1990).

1. External change factors

This chapter takes as its time span the period April 1990 to September 1991, a period which brought considerable change to local government. It was a period in which the 1988 Education Reform Act was at an early stage of implementation, and one in which some of the inconsistencies of the Act became more apparent and the problems of putting it into practice clearer. This is not the place to give a detailed account. The purpose of this section,

rather, is to indicate some of the changes in the external environment which affected, or had a potential effect on, SLS.

The National Curriculum

By April 1990 several of the weaknesses in National Curriculum plans had become obvious. Both Margaret Thatcher, the then Prime Minister^[1], and John MacGregor, the then Secretary of State for Education, had expressed concern at the over-crowding of the curriculum. Grave doubts about the viability of a national curriculum as envisaged by the Government began to be voiced, as well as perturbation at the massive bureaucracy being created^[2].

A group of well-known educationalists followed Tim Brighouse in demanding a new act, while the Institute for Public Policy Research called for a new and less prescriptive national curriculum^[3]. Quite apart from criticism of content, there was also criticism of the length and obscurity of documents coming from the NCC^[4].

By the end of 1990 Kenneth Clarke had replaced John MacGregor as Secretary of State for Education and by early 1991 had announced that 14-16 year olds would not be required to follow a national curriculum of ten subjects, so resolving the dilemma of relating GCSE study and the National Curriculum, but dismaying many people in the process. Secondary headteachers, in particular, were angered that two years of development planning had 'apparently been consigned to the dustbin'^[5].

By Summer 1991 the NCC had completed an evaluation of the first year of National Curriculum implementation, which showed that many of the Key Stage 1 requirements in mathematics and science had proved too difficult for both pupils and teachers, and that time spent on reading had been reduced^[6]. By July 1991 Duncan Graham, chairman and chief executive of NCC, had announced his early retirement.

In summary then, this was a period when the devising of teaching strategies and the gathering of resources for the National Curriculum were set against uncertainty about its long or even mid-term future. This obviously affected SLS resource planning. The good news was that from 1990/91 Education Support Grants - later, Grants for Education Support and Training (GEST) - were available for implementing the new curriculum, including £15 million for books.

Local Management of Schools

In April 1990 ERA's provisions for giving schools greater control of their budgets began to come into effect. Reaction from schools was expectedly mixed, according to whether the standard formula's application brought more or less money. Within weeks, at the annual conference of the Secondary Heads Association, John MacGregor was urging LEAs to reduce administrative costs further, and the theme was returned to in ministerial speeches over the next months.

Statistics gathered from reports in *The Times Educational Supplement* during Summer 1990 showed considerable variations in the proportions of budgets delegated to schools. The point is illustrated by Table XXXI, drawn from those of the study's contact authorities which had submitted figures.

Table XXXI : Percentage breakdown of general school budgets (GSB)

Authority	Limited discretionary exceptions	Unlimited discretionary exceptions	Mandatory exceptions	Allocated to schools
Berkshire	7.10	8.07	13.23	71.59
Cambridgeshire	9.20	12.22	18.98	59.61
Lancashire	9.74	10.28	13.29	66.69
Norfolk	9.72	9.98	7.22	73.08
Havering	9.79	6.17	13.45	70.59
Birmingham	8.85	11.98	12.29	66.88
Kirklees	9.17	13.77	11.65	65.42
Solihull	8.98	9.36	11.72	69.94

In spite of the variations, it can be seen that all were below the 10% requirement for limited discretionary exceptions - the category in which SLS expenditure falls. However, there were already worries about the effect on support services of the reduction to 7% of GSB required by 1993^[7]. As further pruning of central budgets began, SLS were inevitably affected.

In the event, LEA plans had to be revised, since the DES changed the regulations. A draft circular of December 1990^[8], followed by a consolidating circular of April 1991^[9] ruled that delegation was

no longer to be based on a percentage of the 'general schools budget', but on 85% of the 'potential schools budget' (PSB). This target was to be reached by April 1993, or 1995 for Inner London.

The speed with which LEAs were complying with DES requirements could be seen by data gathered in Summer 1991. Table XXXII shows the situation in most of the contact authorities, and the national average.

Table XXXII : Percentage breakdown of potential school budgets (PSB)

Authority	Percentage of PSB delegated to schools	
	1991/92	1990/91
Berkshire	87.68	87.68
Cambridgeshire	87.45	80.45
Hampshire	86.11	85.76
Lancashire	82.74	82.66
Norfolk	84.37	83.62
Havering	85.09	83.87
Hillingdon	83.91	-
Birmingham	83.41	83.04
Bradford	86.68	86.04
Kirklees	84.96	83.38
Solihull	85.59	85.31
<hr/>	<hr/>	<hr/>
Average	85.27	84.18
National average	84.87	83.76

It will be noted that contact authorities were already near the DES target, but that several had made considerable budget adjustments since 1990/91. In the authorities below 85% for 1991/92, pressure to delegate or reduce SLS budgets could be expected.

The history of continuing government pressure on LEAs to reduce central budgets, and the uncertainty generated by the change in regulations (and the rumours preceding it) help to explain why so many Education Departments moved in late 1990 and early 1991 to discussions on delegation of SLS budgets. Once the April 1991 text was circularised, SLS felt safer, for there was an important difference between the draft circular and final version in respect of SLS - possibly achieved by background lobbying. The draft had suggested that LEAs should consider how expenditure for (among other items) School Library Services 'could be allocated to schools through the formula'. The 1991 circular omitted any specific reference to delegation of SLS budgets, stated that the Secretary of State did not 'intend to prescribe specific items for delegation' and accepted that

LEAs may nevertheless wish to continue to manage central specialist teams, to take advantage of economies of scale, to maintain specialist facilities and to ensure essential support for the delivery of the national curriculum^[10].

This paragraph was used by some SLS to justify the continuation of central funding, but for others delegation decisions had already been made, so the statement came too late.

Grant-maintained schools

By September 1990 only 44 schools had opted out of local authority control, but new moves were put in train that year to persuade more to do so by further financial concessions - moves which led *The Times Educational Supplement* to describe this 'partiality' as 'nothing more than a crude political bribe'^[11].

Kenneth Clarke, early in his term as Secretary of State for Education, made clear his hope that grant-maintained schools would become the norm, and in February 1991 announced that, in future, schools opting out would receive the same basic budget as other local state schools plus an extra 16% to compensate for the loss of advisory and other LEA central services.

From that point opposition to the scheme from LEAs has grown, on two counts. One is the handicap it places on reorganisation and closing of schools in the face of falling rolls. The second is that it reduces the budget available to the schools remaining within LEA control. Critics attacked the way in which 'the grant-maintained issue has moved on spuriously' contrary to the first intentions of the 1988 Education Reform Act^[12]. It is significant that by September 1991 the number of grant-maintained schools had risen to 110, an increase of 125% in a year. The issue had a major effect on SLS, as later sections of this chapter show.

The Community charge

A major feature of the local government environment during 1990 and 1991 was the community charge, a per capita levy which replaced the rating system as a means of raising local revenue, and soon became known as 'the poll tax'. This became enmeshed with educational issues, making it very difficult to separate the effects of ERA and the effects of the community charge. For example, Tory encouragement of schools to opt out of LEA control was due in some circles more to the need to reduce the community charge and less to enthusiasm for parent power. As *The Times Educational Supplement* commented:

The confluence of various Government reforms - poll tax, competitive tendering and local management of schools - is steadily producing mayhem on the ground^[13].

Most of the cuts in education budgets resulting from charge-capping, or its fear, fell on non-statutory services, including SLS. Among the study's contact authorities, Hillingdon was charge-capped for the financial year 1990/91, when a reduction in total expenditure of £9.3 million was required, and Berkshire in 1991/92 made a cut of £5.5 million in the education budget as part of a package to avoid capping. By April 1991 a way of reducing 1991/92 community charges had been devised, through an increase in purchase tax. However SLS, like many other local services, continued to be

affected throughout 1991/92 by the financial restrictions consequent on the community charge.

Local Government reorganisation

Throughout the period April 1990 to September 1991, discussions about the effects of ERA were held in the shadow of a much larger change, the reorganisation of local government. As the period wore on, the subject moved from being a threat to being a distinct probability, *The Times Educational Supplement* commented:

The writing is on the wall for the English and Welsh county councils. Unusually, Conservative and Labour are united in wanting to scrap them - though for different reasons^[14].

Not unexpectedly, the issue was helped along by action from the Association of District Councils^[15].

Local funding of education was a dominant feature in the debate^[16] but Howard Davies, commenting on events since publication of *Losing an empire, finding a role*^[17], saw an important role for LEAs continuing, provided that they

can show that they are adding value to the educational process...This means putting the quality and usefulness of their services on an explicitly

contractual basis, so that the value for money they provide is even more visible^[18].

The whole issue was moved ahead in mid-1991 by publication of three green papers on various aspects of local government as part of the poll tax review, and the announcement that a commission to make recommendations on local government structure would be set up in Autumn 1991.

2. Structures

To make comparison easier, the rest of this chapter has an organisation similar to that used in Chapter Five, but in making this division one is aware of the inter-dependence of the various sections. For example, service range is related to policies, and both affect relationships. In seeking to discern new service patterns, all have to be taken into account.

Similarly, in seeking to understand why SLS have changed, it is necessary to look beyond them to the departmental and local authority structures in which they operate. The restructuring of Education Departments 1989/90 has already been noted in Chapter Five, but reorganisation on a larger scale was to follow. Table XXXIII (p. 215) shows the extent of change in the case-studied authorities.

The authority

Of the seven case-studied authorities in England and Wales, five faced a major restructuring, either coming into effect in April 1990 or being undertaken after that date. In three cases this could be attributed partly to a change in political control, the clearest example being Hillingdon. Here, a new Conservative administration soon produced a leaflet, *The Council's vision*, which set out plans both to restructure departments and to streamline the committee structure. A similar picture emerges in the seven link authorities, with restructuring in three.

Chief officers and others interviewed often attributed the decision to examine structures to the Chief Executive, especially where newly appointed, as well as to members.

If a clear political direction is being given, it's largely via the Chief Executive who is very much a catalyst of change, working as a fulcrum between the members of the senior staff who implement the changes.

If any piece of government legislation can be identified as being a spur to this change - and the evidence is by no means clear - it would not be ERA but the community charge, a point made repeatedly in interviews.

The present administration came to power with a pledge to reduce the community charge and that required a radical restructuring.

Everything revolves round the community charge. We are determined to stay within central government limits, and the new structure is part of that process.

Deeper, though, than reaction to the threats imposed by the community charge, was a view of local government function which was informed by the social attitudes and values already noted in Chapter Four - value for money, belief in a market economy, customer consciousness. The policies emerging from these views will be considered in the next section of this chapter, where it will be seen that there is a considerable amount of common ground between left and right wing administrations.

Here one should record that the new structures emerging at this period had a number of features in common. The general tendency - as interviewees confirmed - was to reduce the number of departments by amalgamation, and to reduce the number of senior staff.

We lost posts of deputies, and generally thinned out the structure.

We took costs out at the top end. No posts on Scale 1-4 were lost. It's been a bit brutal, but logical.

Frequently, restructuring of committee business accompanied new departmental structures. Work of committees began to be seen as unduly time-consuming, the processes cumbersome. Consequently, new structures were devised, for example in Cambridgeshire and Berkshire, in which much work was delegated to member panels, with individual members assigned the role of spokesperson on specific specialist issues. Complementing this move, came a clearer corporate role for many chief officers - as in Kirklees where the five service heads, with the Chief Executive, formed an Executive Board. The explanation below from Conservative-controlled Hillingdon could well serve for Labour-controlled Kirklees.

There has been dramatic structural change and radical pruning, plus a completely new attitude to responsibilities. The politicians appoint the Group Directors and decide policies. It is for the Management Board to take these policies into operation, and for service managers to deal with operational detail and delivery.

The Education Department

The next level of change took place at departmental level, sometimes, obviously, as a result of the overall moves for the authority, but not always so. One finds all seven case-studied authorities in England and Wales reporting restructuring of the Education Department, and here the influence of ERA is more apparent, as in the creation of Quality Assurance sections, or the

separation of Inspectors from Advisers, both following the requirement for the LEA to monitor delivery of the National Curriculum. One sees examples of this distancing in Birmingham and Cambridgeshire, in line with the view put forward by the Audit Commission in *Assuring quality in education*^[19] that the local inspectorate is not best placed to give an evaluation of curriculum support whilst also managing it.

Other aspects of ERA were also instrumental in introducing structural change. Local Management of Schools was seen as making schools more independent, and less reliant on locally based education offices, and the result was reduction of the number of area teams, as in Hampshire and Lancashire, or the centralisation of administrative work, as in Cambridgeshire.

It would, however, be an over-simplification to claim that all, or most, restructuring of Education Departments was motivated by ERA. In Berkshire the view was:

Change is coming from three directions for the Education Department - the County Council, ERA and a new Chief Education Officer.

Again, this observation could serve for several other authorities. In such a complex situation, actors inevitably interpreted events differently. The point is illustrated by the reasons given for the restructuring of Bradford's Education Department. A briefing note from Labour members presented it in terms of financial and

managerial benefits, while an officer emphasised the educational effects.

The Directorate of Education decided that a total restructuring was needed if they were to provide schools with the type of service demanded by the Education Reform Act^[20].

The members' list might well have come from a right-wing authority, and is quoted here in full as a record of concerns permeating public services generally.

- * members and senior management will have fewer unit managers to deal with.
- * lines of communication both within the organisation and with users will be simplified.
- * strategic planning will be simplified.
- * co-ordination between the units should be improved.
- * the opportunities for deploying staff flexibly will be increased.
- * financial resource constraints arising from the redirections exercise are more likely to be achieved.

Another feature of recent changes in Education Departments is the speed with which one structure replaces another, and the recognition that further alterations may be needed. Such moves do not indicate indecision, but rather reflect the rapidly changing situation facing Education Departments. Virtually all the second or subsequent restructurings brought a reduction in posts. The purpose given by one authority is applicable to others.

The review has been approached in the context of the Council's policy for all departments to re-examine their services with a view to streamlining structures and procedures and improving quality.

The reasons for the reduction in posts (and therefore expenditure) were three-fold, and given repeatedly by interviewees: government pressure to delegate the maximum amount to schools; LEA fear that schools would opt out if their budgets were too low; central and/or local pressure to reduce community charge levels.

The Library Department

Some restructuring of the Library Department occurred in all case-studied authorities, but in only a minority of the link authorities. Table XXXIII (p. 215) summarises the position and the list below indicates the variety of approach.

Bradford)	-	separation from Education
Cambridgeshire)		Committee; loss of SLS.
Hillingdon)	-	amalgamation with Education
Kensington & Chelsea)		Department
Birmingham)	-	major internal restructuring
Lancashire)	-	minor internal restructuring
West Glamorgan)	-	abolition of separate
			committee

Only two of the link authorities - Berkshire and Kirklees - reported new public library structures, both of which were related to general reviews.

Given that restructuring for most of the public library services studied was part of an authority-wide process of expenditure reduction, some Chief Officers perceived other purposes at work.

The departmental review has three aims - to ensure:

Local management of library services;

A high quality of customer service;

A business approach to the delivery of services.

Birmingham can be seen as an exception, for its new departmental structure was proposed as part of service development rather than service reduction. A 1988 revised senior management structure had been approved by the Leisure Services Committee as one of a series of measures designed to reduce the revenue budget. A report to the same committee in March 1990 took a very different line.

The new City Librarian feels that neither the previous structure nor the November 1988 proposed structure are appropriate given both the size of the Department in budgetary and staffing terms and the service development needs which exist. She believes that a strong leadership role is required from senior management in order to move the department forward from a position of satisfying, with reasonable success, traditional demands for library services in the city, to one of actively promoting the role of library services.

School Library Services

Just as departmental restructuring was often part of authority-wide reorganisation, and arose from a complex of reasons, so new structures for SLS were usually the result of larger moves and multi-motivated.

All but two of the case-studied SLS were affected, as the following list shows.

Cambridgeshire	-	move to the Education Department, as the Schools Library Service Agency, with its head designated 'Senior Adviser'. Divisional Advisers (SLS) developing a phase rather than geographical responsibility.
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- | | |
|----------------------|---|
| Lancashire | - separation of schools and children's services. Operation of SLS on the basis of 3 regions (as opposed to 14 Districts). |
| Birmingham | - separation of schools and children's services. New post at senior management level of Assistant Director: Children's, Youth and Education. |
| Bradford | - move from the advisory section of the Education Department to the School and College Support Service. Former geographical division replaced by division by function - Customer Services and Curriculum Support. |
| Hillingdon | - New structures are still evolving, following amalgamation of public library services into a new Education & Community Services Group. |
| Kensington & Chelsea | - no change in a newly-established SLS, built on a traditional structure. |
| West Glamorgan | - no structural change. |

It is significant that in four cases, services to children and schools were operating separately.

Where a new structure for the SLS was introduced in a case-studied authority, action had been taken partly as a result of ERA. Matters such as the likelihood of delegation of SLS budgets, the saleability of services to schools, and the relationship of schools and children's services had been considered. But such consideration had taken place in the context of different political views, and different perceptions of the opportunities available through change. The culture of the authority and of departments, as well as the perceptions of the senior officers involved affected the answers.

Overall, SLS in the seven link library services showed little structural change, with the exception of Berkshire. Here the service had been functionally divided into two sections - the central resource and school delivery - and initially (against the general trend in the contact authorities) attempts were being made to integrate schools and children's services more closely.

One bonus of the search for rationalisation and economies was that in Berkshire and Kirklees, responsibility for delivery of the School Museum Service was passed to the SLS.

Table XXXIII : Restructuring in case-studied authorities

Authority	Political control		Auth.	Restructuring		SLS
	Present	Previous		Educ. Dept.	Lib. Dept.	
Cambridgeshire	Conservative	Hung	✓	✓	✓	✓
Lancashire	Labour	Hung		✓	✓	✓
Kensington & Chelsea	Conservative	Conservative	✓	✓	✓	
Hillingdon	Conservative	Hung	✓	✓	✓	✓
Birmingham	Labour	Labour	✓	✓	✓	✓
Bradford	Labour	Conservative	✓	✓	✓	✓
W. Glamorgan	Labour	Labour		✓	✓	

3. Policies

We have already seen in Chapter Five that less than a third of SLS in England and Wales (32%) had a statement of policy in 1989/90, although a further 25% reported that one was in the course of preparation. The 1988 Education Reform Act was given then as the main spur to policy formulation, but the considerable restructuring that has occurred since must have provided further incentive, as the new groupings began to consider purpose and functions.

In both chapters, 'policy' has been taken to be a written statement of aims, objectives etc., as in the recommendations of the 1984 LISC report^[22], and the advice in the SLG publication, *Developing a policy for a school library*^[23].

It should be noted, however, that terminology has moved on since the calls in the mid-1980s (documented in Chapter Five, Section 2) for policy statements. It is significant that Brenda White's 1990 article 'Setting objectives for public libraries in the UK', ignores the word 'policy' in favour of mission statement, philosophy and purpose. More recently local government has begun taking on the language of the commercial world, with its business plans, development of corporate strategies etc. The terms used by authorities or officers quoted in this section may vary, but the focus is the same: the aims and objectives which direct the service.

It should also be borne in mind that, even where no formal statement has been drawn up, all organisations operate according to policies - as Pain and Lesquereux make clear.

And be warned - if you do not make the policy someone else will, be this a formal statement or an assumption in someone else's mind...[24].

The authority

Overall in the study's contact authorities, there was a move towards sharper definition of aims, and the setting of targets against which to measure performance, a process that was much more than a response to ERA.

It would be inappropriate to document the decisions reached in all these authorities. Instead, this section will concentrate on three

authorities - Birmingham, Cambridgeshire and Hillingdon - and address three questions.

How were policies formulated?

Policy formulation began at member level. For Birmingham it was undertaken as part of the Council's new Strategic Planning Process, with the expectation that individual committees would follow suit. Cambridgeshire used a Member Review Group, scrutinising all services, and an Efficiency Audit Select Panel. In Hillingdon, a newly-elected right-wing administration had done much prior to election to formulate fresh policies and, within months, had published a leaflet setting these out, *The Council's vision*. The influence of consultants, e.g. Peat Marwick McLintock in Cambridgeshire, should also be noted.

What were the policies?

Birmingham's policies were contained in a major strategy document for 1990/91, *Into the 90s : the city strategy report*, which set out the context ('The Changing City'), objectives and priorities, an appraisal of the resources available, and a list of issues requiring further investigation. Four over-riding aims were identified. It is worthwhile recording them in full, for they provide evidence of the mixture of influences on local government at this time. In their concern for quality and efficiency, the aims reflect national emphases already identified. In their promotion of local issues, the aims show the importance accorded to

local objectives, in spite of increasing central government controls.

To continue to support the regeneration of the Birmingham economy, and to ensure that the benefits of economic regeneration are distributed as widely as possible throughout the community.

To provide services of the highest quality to Birmingham residents, with particular emphasis upon the needs of the most disadvantaged sections of the community.

To enhance Birmingham's national and international role.

To achieve the highest standards of efficiency and effectiveness in everything the City Council does, and to be the best managed local authority in the Country.

In October 1990 Cambridgeshire's Policy Committee endorsed a consultants' report which then went forward for implementation. It focused on three main issues.

Resources are limited and will be so for some time to come. It is imperative that resources are used to the best effect in delivery services.

Services for which a charge can be made should be planned on the basis of cost recovery or profit.

Accountability for service delivery should be placed at as low a level possible with authority for relevant managerial and financial decisions.

In other words, the issues were those noted before in this study - value for money, commercial operation, devolved management.

Hillingdon's policies are summed up in the mission statement contained in *The Council's vision*.

To deliver Quality services at a price which Hillingdon's residents are prepared to pay.

Seven aims were identified which have much in common with Birmingham's, with their emphasis on quality and efficiency. Interestingly, just as Birmingham wishes to be 'the best managed local authority in the Country', so Hillingdon aims to be 'recognised as a national example of good practice'.

Comparing the statements from Birmingham, Cambridgeshire and Hillingdon, one can see that there are a number of common elements, whether the authority has a right or left-wing administration.

Why were these policies formulated?

Birmingham's statement could well serve as a summary.

The aim of the whole process is therefore to put the management of the authority on a surer foundation, with a much clearer link between the overall

objectives of the Council, its short-term priorities and monitoring of performance and achievement.

This aim was similar to that of Cambridgeshire, which recorded its 'wish to operate in a business-like manner', and Hillingdon's commitment to 'reliable and consistent services ... delivered to agreed and known standards'.

Birmingham was also aware that the role of local government generally was under scrutiny, as the concluding remarks in Part Two of its report show.

The future of the City and of its City Council are inextricably linked. In the same way that the City is beginning to emerge from a period of major change and recession, and can look forward now to the future with more optimism, the City Council's future role is becoming clearer. Local government generally will need to develop a very clear and positive vision about this future role. Birmingham City Council, as the major local authority, intends to be at the forefront of that process^[25].

This acknowledgement of the need for policies to reflect national trends is highly significant, and was common to all three authorities. The Chief Executive of Cambridgeshire, in his report to the Policy Committee of October 1990 stated:

We believe it is inevitable that local government will move in this direction. Cambridgeshire now has

an opportunity to demonstrate how Councils can change the way they operate, into a model that is relevant in the 1990s.

In Hillingdon, a June 1991 report to the Policy Committee, *Delivering local public services : a charter for the 1990s*, set out four key strategic objectives which had much in common with advice given by the Audit Commission. The Hillingdon aim was to move to:

An Enabling Council

A Council that can guarantee Quality services

A Council with a sound Financial Base

A Council that commands public support.

The reports from these three authorities also illustrate a change of attitude towards policy. Policy-making was now seen as part of a wider process of planning or strategy definition, which can be expressed in a simple sequence of planning steps.

Assessment of community environment

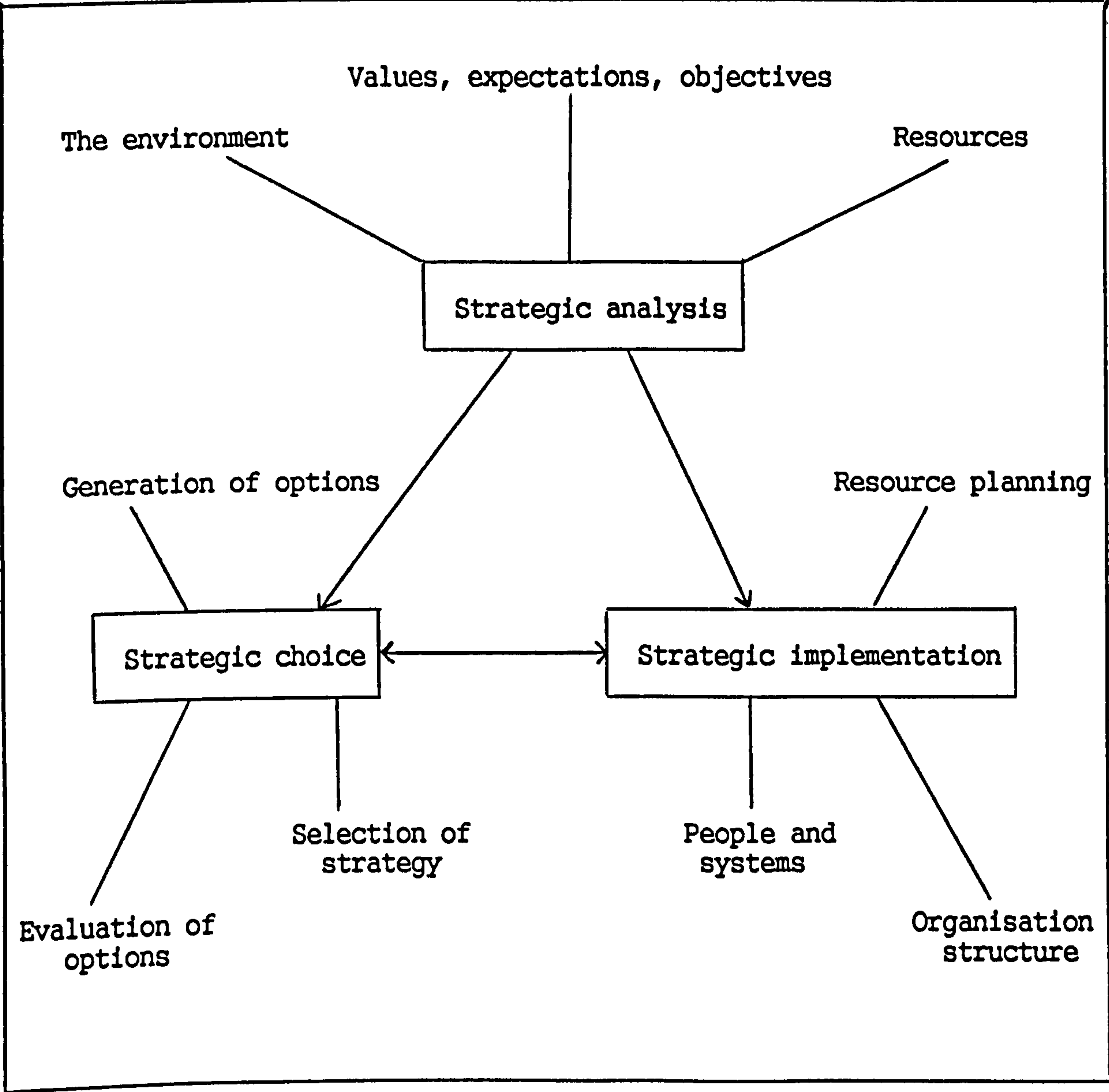
Determination of authority role

Evaluation of current services and resources

Setting of goals, objectives and priorities

The subsuming of objective-setting by a more complex planning process is illustrated in *Exploring corporate strategy* by Johnson and Scholes, where values, expectations and objectives feed into strategic analysis.

Table XXXIV : Strategic management^[26]



The wider picture

Looking at the study's contact authorities one can see that most, whatever their political persuasion, were also engaged in a similar process of policy definition.

All departments are embroiled in policy - defining, costing, marketing.

There is a political will to privatise as many services as possible before the next local elections - and that means knowing the aims and record of each.

We have moved from a Council that was pragmatic, to one committed to setting priorities.

The community charge was often given as the major reason for this interest in objectives and priorities, the aim always being to reduce expenditure, but one can perceive a kind of new orthodoxy which went beyond any acute budget pressures. One can cite:

Clearer differentiation between policy-making and operations;

Devolution of management;

Localisation of services;

Quality assurance;

Citizen entitlement.

These were accepted by authorities of different political persuasion, almost as slogans, yet rarely probed. For example, it was not explained how quality would improve when costs were reduced, or whether the benefits of localisation compensated for the loss of economy usually achieved by centralisation. There was a marked similarity between many of the new policies and those of central government, a similarity accentuated in July 1991 by publication of *The Citizen's Charter*^[27].

One chief officer saw preservation of the existing framework of local government as the mainspring of the policies being articulated, a point reinforced by the briefing paper published by the Association of County Councils in December 1990. The strengths of the counties set out four key criteria for good local government, and judged County Councils as meeting them successfully. The criteria, which bear a strong relationship to others already quoted in this section, were:

- Service quality and effectiveness
- Local accountability
- Sense of place and identity
- Reducing bureaucracy and costs^[28].

It is seen as important for the purposes of this study to identify the context in which changes for School Library Services took place. The growth of interest in policy formulation described here, the perception of its place in management, and the specific policies finding favour, all had an impact on individual departments of local authorities, and in turn on SLS.

Education and Library Departments

Just as the restructuring of local authorities (described in Section 2 of this chapter) had an effect on Education and Library departments, so did new policies and management processes of the authorities. We therefore find the same sharpening of purpose perceived at authority level, but now linked to operations, so departmental documents tend to specify targets as well as aims, and include procedures for monitoring progress. However, even at

departmental level, there are signs of a recognition that policies need to be set in a strategic framework. Examples include two from Education Departments - Bradford's Directorate Plan 1991-92, and Cambridgeshire's briefing paper of October 1990, *Statement of Direction*.

For Education Departments, ERA was also a major influence. Many were attempting to follow advice given by the Audit Commission in *Losing an empire, finding a role*. From this they perceived a reduced role as provider - something of potential significance to SLS - and shifts in power, i.e.

An upward shift to national bodies;

A downward shift to schools and colleges;

An outward shift to parents^[29].

The repercussions on support services is illustrated by a December 1990 report from Cambridgeshire, *Local management - the next phase*.

In essence it represents a shift from management by control to management by contract. Schools and colleges will be contracted to deliver the curriculum. The LEA will be contracted to deliver support services to schools who will have choice in deciding the level of service they require and the supplier.

As with structure, at departmental level one can find several different reasons for attention to policy - sometimes operating simultaneously. These are:

Change stemming from the main Council - largely motivated by the Community Charge;

Change brought about by ERA;

Change coming from departmental priorities.

Documents gathered from Education Departments sometimes emphasise one source, sometimes another - presumably according to political expediency. The astute chief officer might well see the advantage of furthering his own priorities while presenting his case in terms of the authority's.

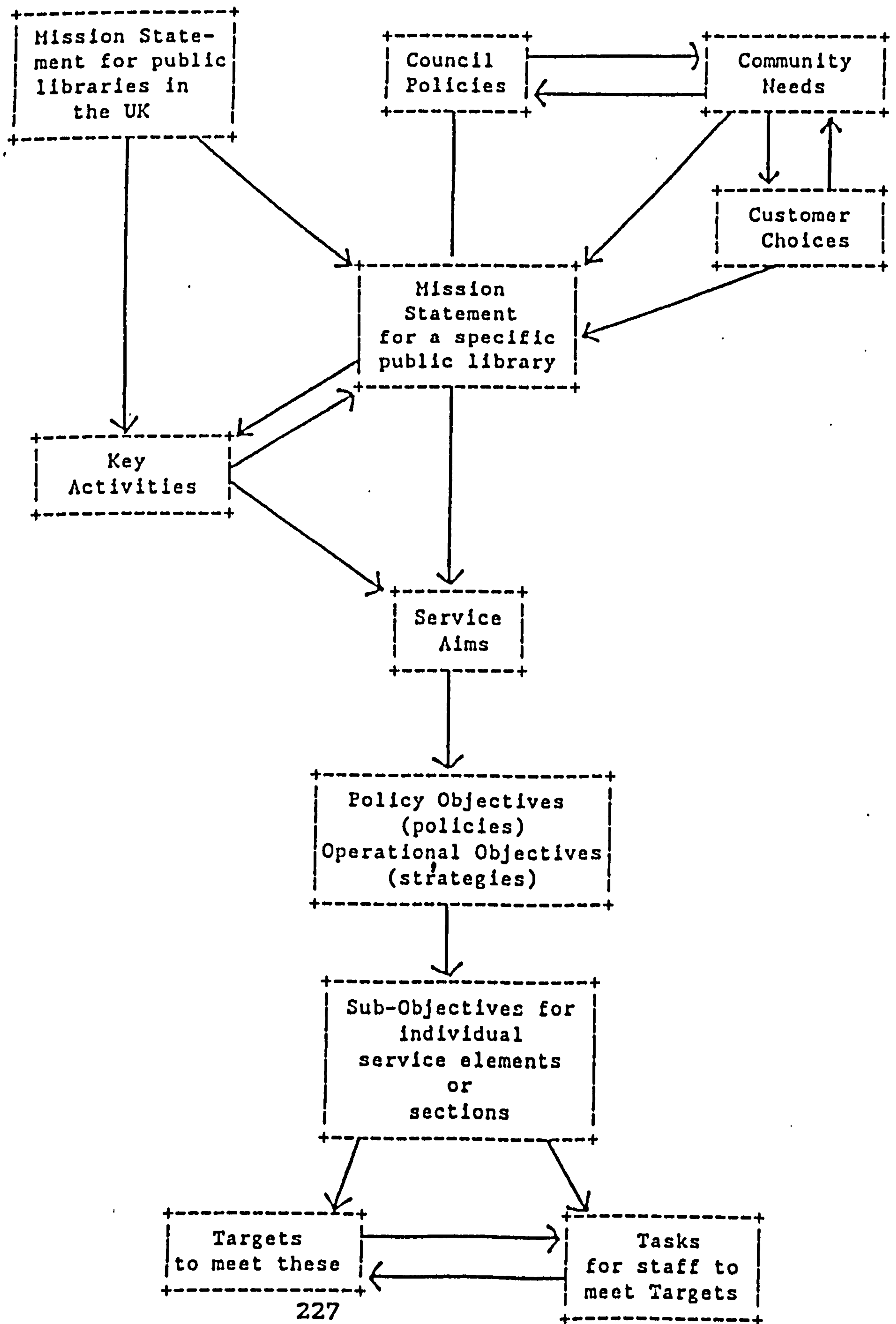
Looking at the Library Departments in the case-studied authorities, all except Lancashire and West Glamorgan were involved in major policy change which originated mainly in new authority policies. In Birmingham, perception of the need for change was increased by the appointment of a new chief officer, but it is significant that she carefully linked the department's objectives in *Committee Strategy Report 1991-92* with those in the City's Key issues for the 1990s.

Whatever the pace of change or its motivation, the trend was clear. Policy had become important to departments and there was considerable similarity in content. The process had become formalised also, taking on many of the techniques of the business world.

A further aid has become available to Library Departments with the publication of *Manual of Public Library Objectives*, produced by a working group of LISC. The following table from this manual sets

out the process of planning and implementation, and the links between the various elements^[30].

Table XXXV : Planning and implementation process



School Library Services

In turn, departmental policies had an affect on SLS. One also notes that - as for departments - most SLS had their own policy agendas in addition. The variety in approach and content supports one of this study's hypotheses - that the effect of ERA is being mediated by local cultures. The following list, based on the situation in the contact authorities, illustrates the difference in policy emphases.

Policies promoting a commercial role (Berkshire, Cambridgeshire, Hillingdon, Wandsworth). Berkshire, for example, was producing an annual business plan, but wished to keep it confidential for fear of possible competition. Cambridgeshire's School Library Service Agency was following a set of departmental ground-rules which stated:

Support Services will be run as Business Units,
succeeding or failing by their ability to operate
successfully in the market.

Policies based on departmental response to ERA (Bradford, Havering, Kensington & Chelsea, Kirklees). Policies in this group were fairly traditional, but the post-ERA sharpness in objective-setting was reflected by a growing tendency to include performance indicators or other means of service monitoring.

Policies based on SLS response to ERA (Hampshire, Lancashire, Norfolk). It is significant that SLS in this group were led in different directions, with Lancashire looking at the implications of its new regional structure, and Norfolk deciding to seek delegation. Hampshire, although avoiding delegation, was keenly aware of the need for change - witness its new objectives.

Develop a marketing strategy;

Raise the profile of the service;

Respond to the educational policy of the Local Authority;

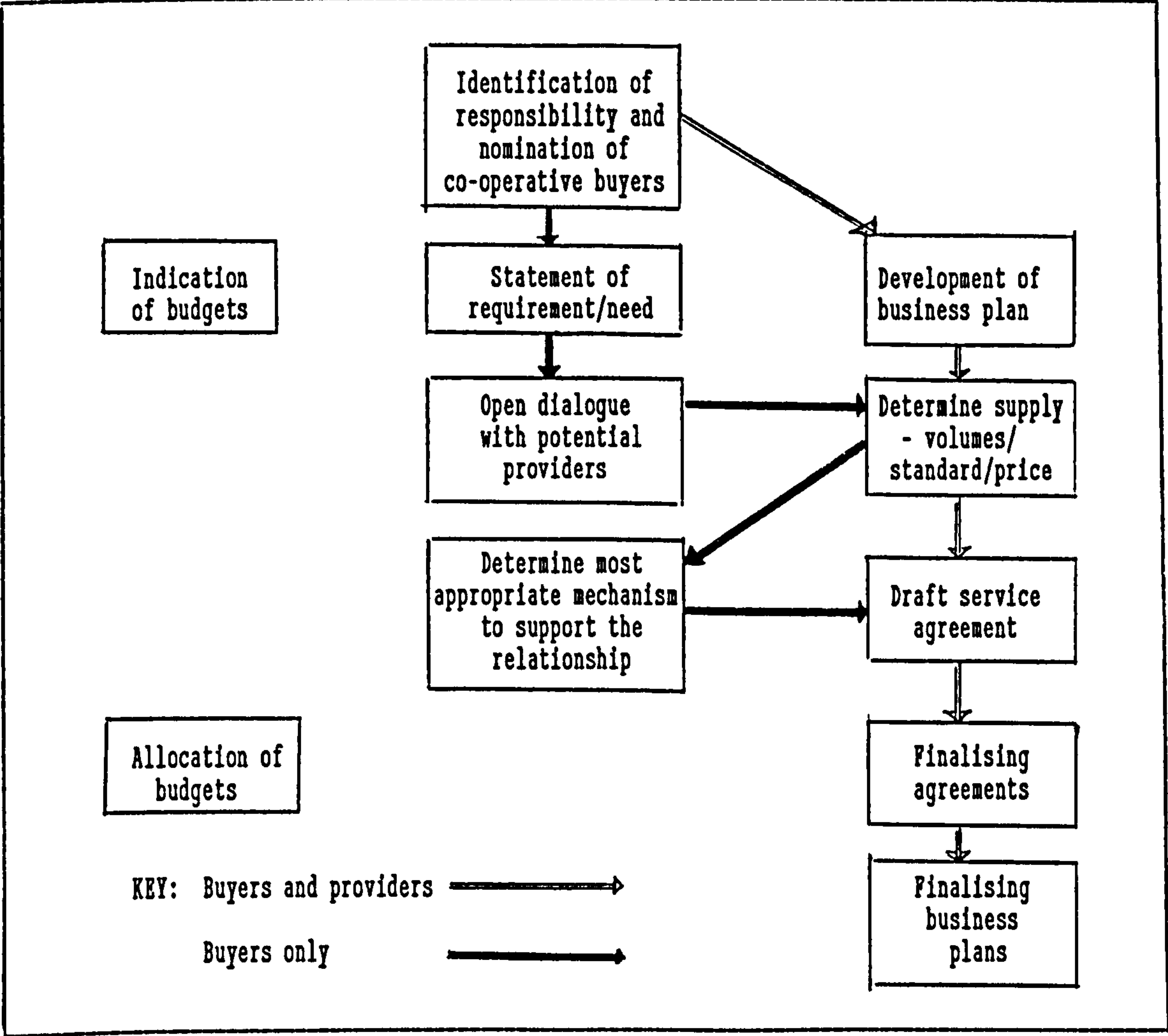
Maintain and develop the service and the expertise within it;

Evaluate and monitor the service.

No change in policy reported (Solihull, West Glamorgan). Even while no formal statements were compiled, interviews showed that changes in attitude had occurred towards the service purpose and systems as a result of ERA.

For all SLS in the contact authorities, schools had become potential customers: some had moved to the buyer-led approach outlined in a Cambridgeshire briefing paper of January 1991 and reproduced in Table XXXVI.

Table XXXVI : Strategic buying framework



There was some sadness or resentment among those SLS based in Library Departments where Education input into policy had been negligible.

We just don't know what kind of SLS the Education Department wants.

We have only just got someone in Education to say that the SLS is a good thing.

Education really must decide what they want of a library service to schools.

We are desperate to get a policy from Education on advisory work. We're just operating in the dark without one.

Opinion varied on the value of the new statements being issued. Some heads of service thought them too superficial, neglecting areas of traditional policy.

In general SLS are concentrating on specification of service and quality assurance, but basic policy is being neglected^[31].

Another commented:

Have you noticed how far we've moved on SLS purpose since the days of the Bullock Report? Then we talked about promoting reading and developing language, professional concerns. Now we talk of meeting customers' needs.

The fundamental question for any commercial enterprise is 'What business are we in?'. Ironically, as SLS moved increasingly to a commercial footing, many felt that the times were not appropriate to consideration of this question.

A policy statement is just a luxury at present. Our main question is 'Will it sell?'.

It's hard to be specific at a time of such radical change. You could say that our main policy is survival.

I think the policy for most SLS for the next three years will be damage limitation.

Commercial concerns then, rather than professional ones, coloured SLS' policy. The main policy decision affecting SLS 1990-1991 was connected with delegation of budgets to schools. That decision was on the whole not made by SLS - Norfolk being an exception - although most were busy in a range of ways trying to ensure a favourable outcome. Nor was the decision always taken by the main clients, the schools, although they were usually consulted in some way. It was generally taken at member or chief officer level for one of two reasons: the policy of the authority or GMS provisions. Some authorities supported maximum delegation as a matter of principle. Others found themselves in a go/stop situation over grant-maintained schools. At first, maximum delegation of budgets was seen as a way of preventing schools from opting out. Then, as LEAs were required to give opted-out schools an additional 16% to compensate for loss of centralised services, it was perceived that central funds should not be reduced too far, and a pull-back from delegation was reported by a number of SLS. Table XXXVII represents the situation at September 1991.

Table XXXVII : Plans for SLS budgets

Authority	Centralised	Delegated	Comment
Berkshire	C	-	Any delegation expected to be phased in, for completion by April 1994. Advisory element remaining centralised.
Cambridgeshire	-	D	Complete delegation by April 1994. Devolution of part costs Secondary Jan. 1992; Primaries Sept. 1992.
Hampshire	C		Over 90% support from heads for funds to remain centralised.
Lancashire	C (Primary)	D (Secondary)	Stock element delegated Secondaries April 1992. Full delegation by April 1993.
Norfolk		D	Delegation of 80% budget April 1992 but earmarked until April 1994. 20% retained for advisory work.
Kensington & Chelsea	C		Justification now required by Education Department of all services funded centrally.
Wandsworth	C		Income generation expected by add-on services and work outside LEA.
Havering		D (Stock)	Stock element only delegated from April 1990 but earmarked.
Hillingdon		D (Staffing)	Some delegation proposed, mainly of the staffing element, by April 1992.
Birmingham	C (Primary)	D (Secondary)	Delegation proposed from April 1994 for Secondaries.
Bradford	C		
Kirklees	C		Some delegation assumed for 1992/93.
Solihull	C		No plans formulated yet.
West Glamorgan	C		No plans formulated yet.

It will be seen that there is no one pattern, but some trends can be identified. Primary schools are deemed to need a centralised service more than secondary schools. Advisory work, inspections and reviews are classified as work for the authority rather than schools in two authorities, and such distinction was perceived as helpful by other heads of SLS who were engaged in similar negotiations. There are many examples of partial delegation. The decision to retain SLS budgets centrally was usually taken on economic grounds, the argument being, in essence, that given in Bradford's *Guide to the LEA's Central Services* of June 1991.

These services are excepted items because of the cost-effective nature of the support. Economies of scale can be made and quality of expert advice can be provided by continuing a centrally funded, client focused service.

It is appropriate to quote here the criteria used by Lancashire, which are applicable elsewhere.

In each review, the support service/activity will only be retained as an excepted item if it satisfies two of the criteria, either (i) or (ii) and either (iii) or (iv):-

- (i) The service/activity is necessary to ensure compliance with the Authority's statutory duty;

- (ii) The Authority wishes, as a matter of policy, to ensure continued provision of the service/activity, in which case the provision must be available equally to all schools/pupils which qualify for the service;
- (iii) The services/activity must be of proven worth and central retention must represent the most efficient and effective method of delivery. (A service would not normally be excepted from delegation if it were available from another source, eg private contractor);
- (iv) The costs of the service/activity are unsuitable for inclusion in formula funding arrangements because of uneven incidence of expenditure.

In some authorities, however, such clear criteria were missing, delegation plans being driven by new government requirements on LMS or fears about opting out, to the unease of SLS managers.

We are having to take decisions for the wrong reasons. We should be making decisions on educational grounds instead of being ruled by percentages.

The culture of the department or authority was apparent in the choices being made within delegation packages. Some authorities were seeking to protect staff as far as possible in an uncertain climate, and were therefore planning to delegate the stock element of the budget. Hillingdon felt that delegation of the staffing element would be a better choice.

Perhaps the staff costs of the SLS - about 50% of the total budget - will be delegated. It would meet the political will to delegate the maximum and would ensure that the existence in post of SLS staff would depend on the quality of their service. We don't place security of staff above customer choice.

In summary, the policy statements emerging from SLS from April 1990 onwards differed very much from previous ones (see Appendix J), and the process of formulation, with its link to delegation of budgets, left some staff uneasy and others confident that they had a saleable product. Well conducted, the process could be valuable, irrespective of the delegation issue, as Bob Wilkes records.

What will happen after that is pure guesswork but I feel more confident of the service surviving now that it is clearly identified - whether it be as a centrally financed discretionary exception or with our budget devolved to schools for them to buy whatever services they require from us; or as a

completely independent management buy-out educational unit^[32].

4. Service range and level

While, for ease of comparison the structure of this section is similar to that used in Chapter Five, terms and concepts of service have changed since 1989/90, just as the terminology and process of policy formulated have changed. One most important difference was that by now the client view of service priorities had been obtained - by questionnaires or less formal means - in most of the study's contact authorities. It would be incorrect to claim that new service models had been designed just to match schools' suggestions, for a complex of political and practical considerations were also in play, but the focus of service had shifted and examples were gathered of SLS proposals being modified by schools' ratings of different service elements.

Loans of materials

Unease grew among SLS managers as to the value of bulk loans, partly on grounds of effectiveness, partly on grounds of cost.

I'm keeping the exchange service going but I have growing doubts as to whether it's the best way to use our resources. I prefer to see them targeted. I'm certainly not promoting the exchange service and see our essential role as classroom support.

Where the SLS is just giving out a hundred books, are the administrative expenses justified?

In several authorities the cost of exchanges of bulk loan stock by mobile was seen as very high, involving salaries of librarian and driver, running and capital vehicle costs, and there were serious doubts about the viability of this service.

Complicating any decisions were views from teachers which in some authorities showed the high value placed on long-term loans. Top of the list for Kensington & Chelsea schools was 'a semi-permanent collection with an exchange facility', and teachers in Hillingdon, while placing project loans as the top priority, also voted long-term loans as 'essential'.

In the circumstances, the tendency was to amend or add to the long-term loan system rather than terminate it. Hillingdon, for example, extended long-term loans to junior schools (helped by GEST funds), improved loans to secondary schools by covering both fiction and non-fiction, and encouraged self-service exchanges by teachers.

Some of the kind of reservations felt about bulk loans were also expressed about projects.

I wonder how useful our project loans are to school work.

First the demand was for science and maths, now it's for history. It's worrying because potentially every school could be doing the same history project.

The five-year development plans of schools will help identify the continuing programmes and the resources they need. Longer-term this should reduce calls on us for projects.

The Lancashire working group on the review of LMS arrangements had a similar view on project loans.

Whilst it was noted that it would be better for schools to build up their own resources in the long-term, there was still a short-term need for a loan service. Given the increasing demand for this service it was recognised that there would be a need to limit the number of loans to each school.

Quite apart from speculation as to the educational value of project loans, there was worry about the sheer work load they engendered.

Projects are usually despatched at the beginning of term and returned at the end, which leads to an enormous build-up of books to be checked and shelved. It's a very labour-intensive job, staff don't like doing it, and the result is that we've got boxes of books out of circulation, waiting to be unpacked.

Given these reservations set against increasing demands from schools, some SLS looked for economies, the most obvious being a move to pre-packed project boxes. Wandsworth was the best example of this method among contact libraries, since its main operation was a project service for Key Stages 1, 2 and 3, which began in April 1991 with boxes of 25 books based around 25 topics. The topics were linked to the National Curriculum and boxes contained lists showing the relevance of the contents to Attainment Targets. Berkshire, Cambridgeshire and Hillingdon SLS were among those moving to provide some pre-packed boxes linked to the National Curriculum. This system was also seen as providing a common quality of service.

Another trend observed was the extension of short-term loans to fiction collections, sometimes themed (Hillingdon), age-grouped (Berkshire), or of recommended titles (Kensington & Chelsea).

Berkshire was also trying to make a closer link between the purchase scheme and project loans, and to promote the purchase scheme as an alternative to long-term borrowing.

In discussion with teachers and advisers we're trying to establish the resources needed permanently in schools, and we're encouraging schools to build up that core collection either through the loan service or through purchase. We are aware that schools may want to buy project items, and see the fiction boxes as leading to purchases.

This move to emphasis on a core collection - a logical corollary to definition of a national curriculum - was suggested also in Lancashire by the working party on discretionary exceptions. It found the SLS associated with provision of 'background material' and urged a move to building up core resources.

Among contact libraries generally there was a desire to be seen as a necessary service, which was bringing a concentration on resources directly relevant to the curriculum. It was also bringing a reorientation of resource provision away from school library enrichment to classroom support.

Our evidence suggests that books are better used if they go into the classroom, and that's where we're concentrating our efforts.

SLS should be supporting the learning process whenever it occurs. School libraries are a part of this process. The emphasis is therefore on the learning process^[33].

This was in line with a similar change in Kent and Wiltshire.

Whether or not SLS managers saw loans of materials as becoming less important in the long-term, they did not doubt that, in the short-term resources provision was their major strength for two main reasons: schools wanted resources; SLS had no appreciable competition in their loan services.

At the December 1990 seminar one of the questions put to participants was:

The future role of local government (INLOGOV, 1985) suggests that local government agencies should act as facilitators and catalysts, rather than providers of resources. Do you agree with this analysis: For local government generally; for SLS in particular?

The group addressing this answered:

No! This is an outdated statement: local government has passed this stage. De-centralisation means that facilitators and catalysts no longer exist. They are victims of the Community Charge. Local government, whilst still providing stock and plant is 'privatising' the management of it and then this management has to compete for the contracts.

At the moment SLS have no competition as providers, but there are freelances available for advice etc.^[34].

Advisory work

SLS staff can act as advisors in two capacities: to the schools and to the LEA. Comments gathered during the study suggested that the main change in direct advice to schools was that service to governors was growing - not only through the setting up of

collections of material in branch libraries etc. but through an information service, sometimes, as in Bradford, highly developed.

The growth role within advice to the LEA came through school review programmes. Among the seven case-studied authorities Bradford and Cambridgeshire had begun work of this kind : among the seven link library services Berkshire, Norfolk, Havering and Wandsworth reported participation in review programmes. Others were attempting to negotiate a role. Hampshire's whole approach to school reviews was low key, an approach the SLS was quick to reflect. Cambridgeshire, also, was anxious not to impinge on heads' responsibilities - even amending procedures in the light of criticism. In this new role, particularly, SLS managers needed to be sensitive to the local culture.

Bradford's SLS manager had already found that other local inspectors welcomed the practical nature of library reviews, something which had been helped by the drawing up of guidelines. Apart from Bradford, the SLS in Cambridgeshire, Havering and Norfolk were using written guidelines, with Havering adopting Devon's very detailed *Resources for learning*, a handbook for evaluation of secondary school libraries^[35]. In addition, in Cambridgeshire the SLS had produced a briefing list of questions relating to Key Stage 3 evaluation, making the point that:

All the Key Stages of the National Curriculum, for all subject areas so far reported, include many references to extended use and understanding of a

wider range of learning resources, by pupils and teachers.

The questions are seen as having a potentially wider use and are reproduced at Appendix K.

Some SLS managers saw a conflict between the roles of provider of resources and inspectors of resource provision, a dilemma which had already been resolved at Education Department level by creation of separate sections for Quality Assurance and Curriculum Support. This problem will require attention, but meantime SLS staff involved in reviews have valued the experience.

The advisory, as opposed to inspectorial, function of SLS seemed to have changed little in the period. Some heads of service reported a drop in advisory work as schools concentrated on implementation of ERA but one at least thought this was only temporary.

The advisory side will come back after a couple of years. For our staff the SLS is made up of stock plus expertise; teachers just equate it with stock, so we're starting there. We go in to do stock revision for the National Curriculum, in the context of an INSET day, and that's leading to advisory and development work.

Support services

There were changes to report under all the service aspects identified in Chapter Five as 'support' - INSET, central purchasing, exhibition collections, book lists. In this connection, application of Yin's techniques of pattern-matching, (i.e. comparison of predicted and actual patterns) yields interesting results. For example, as Table XXVII shows, contribution to INSET was regarded as the main development area for SLS in 1989/90. The subsequent history shows INSET work at a rather low level, and with the impetus largely in the hands of schools, as budgets (apart from funds allocated to LEAs via GEST) were delegated.

The purchase scheme also changed, in some cases merging with the exhibition collection (Hillingdon and Kensington & Chelsea), and in Berkshire becoming more closely linked with the project service. Two SLS thought that sales were being lost to bookshops, which were now able to offer the same 10% discount on retail prices as the SLS.

In those circumstances it was not surprising that a search for bigger discounts began, with one SLS far advanced.

At present we're passing on the 10% discount and absorbing staff costs. In future we hope to operate as a bookshop, getting larger discounts from

publishers. We may do this in cooperation with a library supplier.

Library suppliers were obvious partners for SLS wishing to expand sales at minimum cost, and several of the contact libraries were at an experimental stage of such partnerships. In one case the supplier was bringing a stocked mobile bookshop twice a term, in another providing major exhibitions linked to the National Curriculum, with multiple copies available and an immediate purchase facility.

In spite of worries about the effect of more widely available discounts, there were several reports of increased sales through GEST provision for National Curriculum books. The allocation of £15 million for this purpose began to have an effect, whether local authorities passed it to the SLS or distributed direct to schools. Overall, purchase schemes were thought to be likely to expand, at least in the short-term until competition became more apparent.

A conceivable outcome of ERA may be that schools will buy more and borrow less, and we're watching that balance.

Static large exhibition stocks were edging their way out, and more precisely targeted initiatives moving in, which blurred traditional service distinctions. Berkshire illustrates the point.

For years we have had touring exhibitions around specific themes. These used to be based on published booklists, but now we're building up lists in collaboration with specialist Education staff, and then getting together all the items listed. Our exhibitions are essentially based on identifying and gathering resources around specific curriculum areas, such as primary science. Because of the changing nature of project loans there will be very little difference between a large project and a small exhibition.

Promotional services

SLS were more occupied in promoting the value of their service than in promoting reading. No new initiatives were reported by contact SLS, although there were signs of a new impetus in that direction by the children's sections of public libraries. Birmingham, for example, was making a very positive commitment to improve literacy and encourage reading. The work of SLS in reading promotion was mainly a continuation of previous programmes, with perhaps some extension in Bradford where fieldworkers had been designated Curriculum Support Librarians.

Nor were there reports of fresh work in promotion of information skills, although Norfolk established a second post of Tutor-Librarian. This followed the success of the first post-holder in carrying out a cross-phase programme which included a major

information skills component. In Cambridgeshire there was extension of a pilot project introducing the SIMS (Schools Information Management System) library module with the assistance of TVEI funds. Bradford installed NERIS and CD-ROM at its main base and found them very popular with teachers, and also put on a common data base the stocks of other resource centres funded by the LEA - work which began to lead to ideas about rationalisation of collections.

Budget and Costings

The main question about SLS budgets is: have budgets gone up or down? The answer often is that they have done both. Reductions in council budgets called for by the community charge have often been offset by special government grants, for example for National Curriculum books. Departmental total budgets have suffered cuts - with a consequent effect on SLS - yet book funds for the same departments have often been increased by an inflationary element. In other words, both central government and local treasurers have imposed cuts on the one hand and made grants or extra allowances on the other. So, for example, one SLS lost two professional posts, only to have them restored via GEST. Cuts tended to be community charge rather than ERA driven: increases came most often through the National Curriculum, so to that extent ERA can be seen as having a beneficial effect.

One role that threatened to be diminished because of ERA was the catalytic or developmental role of SLS - so apparent 1985-1988. As

LEAs lost funds for local incentives, the other major source was the GEST scheme of central government, and some SLS began to see ways of aligning their developmental hopes for school libraries with GEST guidelines. Looking at the SLS which continued to lead school improvement programmes one can see a range of funding arrangements. Norfolk's Better Libraries scheme came from SLS funds; Cambridgeshire's challenge scheme for appointment of Chartered Librarians in schools was allowed to continue as a rolling programme for six years through LEA funds.

This was obviously not a time of large budget growth, and Birmingham SLS was unique among those case-studied in achieving additional revenue funds of £116,000 for 1991/92 plus a substantial capital sum in the region of £0.5 million, spread over two to three years. Education Department budgets were in a state of flux in 1990/91, the first year of LMS, and there were reports of both losses and gains for SLS, depending on whether central budgets ended the year unexpectedly low or high. In summary, this was a period of instability for SLS budgets, sometimes as a result of ERA and sometimes because of other national or local factors. Such a financial climate called for a high degree of political awareness and negotiating skill on the part of SLS managers.

5. Relationships

One of the key relationships for SLS is with the local Education Department, and here the earlier sections of this chapter have shown that, in general, the link was strengthened through

structures and policies. But, for a study interested in the perspectives of the subjects, one must also take into account the rating of this relationship.

Of the 14 contact SLS, six were either in Education Departments or Education Directorates in September 1991. The three in the first category - Bradford, Cambridgeshire and Wandsworth - were very positive about the advantages.

Advantages of being part of the Education Department include: a higher profile with top Education management; closer co-operation with other education units; protection of service by politicians - one committee only; ease of marketing as one of the new units which gives the schools something tangible^[36].

Communication is so easy: our structure and location bring regular meetings with Inspectors and other support staff.

For those SLS in Library Departments that were part of Education Directorates this unity had not yet been established - an indication of the management challenges such large directorates pose.

Negotiations relating to LMS inevitably brought more meetings between Education and SLS staff, but did not always lead to an improvement in relations where the Library Department was the SLS

home base. Some heads of service felt that they had gained respect for their approach to delegation and their command of core management information. It is significant that often these exercises made education officers aware for the first time of the parameters and scale of this support service. Confidence in SLS expertise was also demonstrated when heads of service were brought into the school review programme, or where it was proposed that part of the SLS budget should remain centralised in recognition of an advisory and inspectorial role. However, two of the seven case-studied SLS described relations as distinctly distant, and quotations given in Section 3 of this chapter show that tensions were quite widespread.

Chapter Five has described liaison patterns 1989/90, which ranged from formal committees to impromptu encounters. Post-ERA these patterns became even more complex as, to relationships with Inspectors/Advisers (always important), were added working contacts with departmental finance and LMS officers, and with staff of the professional development centres in which five contact SLS were based. Information provision to education officers became an additional service which grew for some SLS as a natural consequence of closer relationships.

A long-standing complaint nationally had been the lack of guidance given by the Education Department on SLS operations.

It's a pity that the Education Department isn't more proactive. I wish they would say "We need a service:

can you give us one?". Instead the Library says "Here's a service. Would you like it?".

Gradually such guidance began to be offered through the drawing up of service level contracts between the SLS and the Education Department - with Berkshire ahead here - or with recognition, as in Cambridgeshire, that 'the corporate core is also a buyer of support services'.

Yet the stresses and alienation noted in earlier years remained. In some cases there was criticism by SLS of the whole education operation; sometimes it was seen as a clash of professions; often it came because of the way SLS were overlooked. The following quotations illustrate the range.

There is a lot of criticism of the Education Department locally for its fortress mentality, over-bureaucratic approach and the poor physical condition of schools.

We're not teachers, so we're outsiders.

Education doesn't want any sense of ownership of the SLS : they just seem to see us as a nuisance. We're always the ones doing the running, and we just get baulked by people delaying decisions.

We are always having to badger and persuade Education. That's not a satisfactory way to run a service.

A quotation from Bradford addresses the specific question of professional isolation, and gives cause for hope.

I don't find any resentment because I'm not a teacher, because a lot of other senior managers are from non-teaching backgrounds. There's far more variety nowadays in people's qualifications, and several have management degrees instead of teaching qualifications.

The central relationship virtually unexplored was that between the SLS and other LEA resource centres, e.g. for religious education, science, language support. There is a clear community of interest between such centres and the SLS, and opportunities exist for economies in terms of stock, accommodation etc. Yet, even where SLS were sited in a professional development centre, unnecessary duplication of service and resources was sometimes observed.

Another key relationship for SLS is that with schools and this altered radically as a result of LMS. Again, as with policy, the change was reflected in the terminology, with SLS becoming business units and schools becoming customers. As with Education Departments, service level agreements with schools were being prepared. Bradford, for example, was intending to pilot these in

1992/93, and saw a need for such arrangements even if SLS budgets remained centralised.

We're looking for a new style SLS, based on each school's entitlement in terms of service levels and contracts.

There was no indication among contact authorities that SLS staff felt demeaned by becoming sellers to customers, for this move was seen as permeating local government and many other public services, quite apart from it being a major thrust of LMS. Whether budgets were delegated or not, the new relationship with schools was seen as here to stay.

It's not just about budgets and costings: it's about ownership.

For the SLS based in Education Departments (Cambridgeshire, Wandsworth and Bradford) an early task post-April 1990 was to establish a good working relationship with the local Library Department. Bradford SLS, with the longest experience of this structure among contact systems, had managed the departmental transfer well and was choosing to buy in certain bibliographical services from its former parent department. However, even where SLS remained in the Library Department - the traditional model - the changes consequent on ERA were causing a reassessment of relations between school and children's services.

Section 2 of this chapter has already described the restructuring in Lancashire and Birmingham which led to the SLS becoming a separate unit within the Library Department. In both authorities there was a belief that this change would lead to improvement in children's services. The Birmingham report of September 1991 to the Schools Services Sub-Committee noted problems of past arrangements for children's library stocks which 'are not geared to the specialist needs of teachers and cannot support them'. Lancashire's change brought establishment of a District Children's Librarian in each of the county's 14 Districts, a considerable improvement on the earlier staffing. In both these cases, then, children's services were set to benefit from changes which, however complex in origin, were connected with the need to offer an improved service to schools in the light of LMS. In discussions outside the contact libraries the neglect of children's services under integrated arrangements was a recurring theme. Of the contact libraries, only Berkshire initially moved to a closer integration of the two services, a development which was reversed in a 1992 departmental restructuring.

At the seminar in December 1990 one question explored was:

What do you see as the implications for public library services of financial delegation to schools?

The answers show some of the points requiring attention, and it is right to note here that many of them had been addressed by September 1991.

- i) It creates the need to decide what is a service to schools as opposed to the child as an individual. What about class visits, book talks in schools etc?
- ii) It cuts down on flexibility between SLS and public libraries especially regarding stock, staffing and training;
- iii) It affects relationships: between teachers and the local librarian, between the library and education departments, and between senior colleagues within the library service;
- iv) Public libraries may encounter a great deal more use from schools, especially if schools decide not to use delegated budgets to buy books or buy into the SLS;
- v) The public library service has the capacity to undermine the SLS eg. by offering 'informal' help to schools and teachers. This could drive a wedge between services traditionally linked.
- vi) Two cultures are growing up side by side - entrepreneurial on the SLS side and more traditional on the public library side. This could cause further division.

vii) The capacity of public library staff to get involved in work in schools may be curtailed.[37]

Advantages and disadvantages of separation and integration of schools and children's services were set out in Library Association guidelines of 1991, which recommended that

each Authority should have a specialist post at senior management level with overall responsibility for coordinating, managing, developing and monitoring services to children and to education^[38].

During 1990 a number of senior librarians expressed their worries about children's services being regarded by schools as a free alternative to a charged SLS.

There's going to be no back door service to schools on the cheap.

I don't want to be in the position of turning children away from public libraries in order to support the schools service.

Radical changes in children's service were suggested, for example making it a purely recreational service, with a drastic pruning of stock which might be used for projects. The fears seemed to have

receded by Autumn 1991, and several SLS managers reported that grant-maintained schools were not taking undue advantage of the public library.

Opinions differed as to the effect of SLS change on the parent department - one of the questions used in the second round of interviews.

The effect of delegation of budgets is unlikely to be great because we already have pay services to hospitals and prisons.

I'm afraid that the changes to the SLS will have a detrimental effect on the department: we haven't gone in for gimmicks here.

The SLS could be our flagship. It could teach other parts of the library service a lesson and provide a model to be followed elsewhere.

I see a mixed economy of free and charged services desirable throughout the library service, and the SLS is part of that change. I think this is the way public libraries generally are moving - some free services, some generating profit, some recovering cost.

How will the Library Department react to having a commercial unit - School Library Service PLC - in its midst? We are moving from the cocoon of a

traditional service to the cold wind of market forces, but leaving the rest behind, engaged in completely different problems.

6. Perspectives from Northern Ireland and Scotland

Information in this section derives mainly from studies over a two year period of the SLS of the Southern Education and Library Board, Northern Ireland, and the Lanark Division of Strathclyde Region, Scotland. These were supplemented by seminars in both countries. Two seminars were held in Northern Ireland in December 1990, the first for Chief Librarians, the second for SLS staff. The Scottish seminar, held in March 1991, was arranged in collaboration with LISC (Scotland) - now renamed as the Scottish Library & Information Council - and the Scottish Library Association. Participants here included chief librarians, SLS managers, a chief education officer and the HMI with specific responsibility for school libraries in Scotland.

Northern Ireland

The context of SLS change, while similar to that in England and Wales, had some important differences. The issuing of the *Education Reform (Northern Ireland) Orders* has already been noted in Chapter Five, as well as the perception that the Common Curriculum was more manageable than the ambitious National Curriculum. The timescale for introduction of LMS was different, with April 1991 the starting date. As the months went by, problems

arose which suggested that the original timetable for completion might not be viable. The pilot scheme for LMS found that of 56 schools involved in the year-long project, less than half had produced a management plan and one third had failed to set up the required committee: one fifth had no system for budgeting and monitoring expenditure. A recurring difficulty had been finding time for such work given the everyday demands of school management^[39].

Then dissension arose about the formulae by which budgets were being allocated, and there were doubts as to the status and funding arrangements for integrated schools, which appeared to be gaining grant-maintained status^[40]. For 1991/92 an additional £16 million was made available to implement the educational reforms, but there were criticisms that too much money was being absorbed by the five Education and Library Boards instead of being passed on to schools. From some politicians came calls for the abolition of those 'vast inefficient bureaucracies', while teachers criticised increases in Board staffing at a time when their responsibilities had been reduced.

I just cannot understand why the Department of Education has found it necessary to establish such an expensive and numerous army of advisers and field officers^[41].

Against this background of uncertainty and criticism, delays in implementation created an atmosphere of stalemate, in which it was

hard for SLS managers and their chief librarians to perceive how best to proceed.

LISC (Northern Ireland) at a meeting with the Minister of Education in June 1990 had stated

It is gratifying to note that at least for another year School Libraries will not be affected by LMS. It would be our contention and an argument for another day that this is the way they should remain^[42].

At present it is too early to say what effect implementation of the Library and Information Plan (LIP) accepted for the province will have on SLS. As for LISC (Northern Ireland) the Executive Officer stated in a letter relating to this research, March 1991,

School Library Services do not feature on the LISC agenda at present.

Within Library Departments the traditional structure - of three Assistant County Librarians at second tier, one with a responsibility for Youth Services - continued to change. Budget constraints led in a number of Board areas to a reduction of second tier posts from three to two, and greater distinction between strategic and operational management of SLS.

To some extent one notes the same restructuring at Board level as is apparent within local authorities of Education Departments in England and Wales. For example a new staffing structure for the Southern Education and Library Board took effect from September 1990, the pressures for change being cited as educational reform and compulsory competitive tendering.

There is now a Director of Commercial Services to oversee CCT. The biggest growth area has been in advisory and support teachers as money was made available following the Common Curriculum.

A new chief librarian, a former Assistant County Librarian, came into post in February 1991, and posts at second tier level were reduced to two, with duties redistributed. This reduction was caused by financial constraints.

We have had falling budgets since 1986. An assessment of annual needs is carried out by the Department of Education for Northern Ireland, based on the floor area of public libraries. We are having a hard fight to maintain a base figure.

Among other changes, the former Assistant County Librarian, Youth Services, now has an advisory role only for children's work. Belfast had already separated the two roles, and it seems likely that this will be the future trend.

The restructuring of the Southern Education and Library Board was followed by production of a Strategic Plan 1989-1991 which emphasised the break with past legal and political frameworks.

Those frameworks are about to change and that stability is now at an end. Legislation for education reform, the extension of local management to schools and colleges, market testing, computerisation and the pursuit of value for money in every operation of the public service are all combining to create an upheaval.

The plan began with a mission statement - which included 'responding to the needs of customers' - and identified opportunities and challenges. Mentioned here are the Education Reform legislation and 'The New Enterprise Culture'. This plan might well serve for an authority in England or Wales: the influence of government changes in education and of the market environment are acknowledged in all three countries. To a large extent both these forces lead in the same direction, and their effects cannot easily be separated.

As so often in England, the policies of the Board were reflected in the subsequent Strategic and Operational Plan for the Library Service 1991/2 - 1995/6. The mission statement cited is that accepted by the Association of Chief Librarians (Northern Ireland) and ^{this is followed by lists of strategic aims and issues, plus} ~~is reproduced at Appendix I, along with the library service's~~ ^{operational objectives,} ~~list of strategic aims.~~ The policy statement for the SLS was in

preparation in Autumn 1991, but the operational objectives of the library services plan already included several relating to the SLS, i.e.

Attempt to ensure that the service meets changing curriculum demands as a result of education reform legislation;

Monitor legislation in the Education field and its implications and effects on the school library service;

Respond to the challenge of LMS and develop a blueprint for the future role of the library service to schools.

On the major policy decision affecting SLS - whether to centralise or delegate budgets - there was no clear leading. A discussion document, *The Schools Library Service and the Local Management of Schools*, had been prepared by the heads of SLS and it was anticipated that this would provide the basis of a presentation by the chief librarians to DENI during that Autumn. It was known that DENI favoured delegation, but by September 1991 it had agreed to defer for a year (i.e. to September 1992) decisions on further delegation of support services' budgets.

The Boards are acting together over the Northern Ireland Orders, but Belfast and the Western Board have already made a positive statement on the need to

keep SLS expenditure centralised. Northern Ireland has many small schools which would suffer if budgets were delegated.

It was expected that the Chief Librarians would wish to retain the status quo.

Comments on service range and level at seminars, were again, similar to views expressed in England and Wales.

It's hard to sell a service which isn't resourced properly.

Project loans, although the most useful thing we do, are getting unmanageable.

There's been a 70% increase in project loans since GCSE began.

Yet, while reservations about specific services were being expressed, little change was made to them in this waiting period.

Within the Southern Education and Library Board the SLS reported four main changes, the first two arising from the educational legislation. First came an increase in requests to run school-based INSET days; next production of book lists relating to Common Curriculum subjects, with selection assisted by advisory teachers. Thirdly, operational objectives included one to ensure more

effective use of stock, by encouragement of central libraries in primary schools.

The biggest change came from new copyright regulations rather than educational reform. The SLS of the Southern Board had been nominated as the Northern Ireland centre for off-air recording, and had begun on 1st April a postal loan service covering a wide range of broadcast and televised programmes, extended through an EEC grant to foreign language broadcasts received by satellite. The service was designed to be self-financing and figured in the library services strategic plan under 'Market Opportunities'. It is interesting that the first opportunity for trying out a commercial role was quite unconnected with education legislation.

Looking at relationships, the same views apparent in England and Wales were found in Northern Ireland. Rarely was the relationship with the education service of local Boards really creative.

We're not really supported by the education officers.

It's more a question of their responding to our requests. However, some of the Advisers are tremendous.

The relationship shouldn't be difficult, but it is.

While the chief librarians were taking a close interest in the future of SLS, problems relating to children's services were foreseen if budgets were delegated.

There is likely to be tension between school and public library service if we get delegation. It's very difficult to disentangle the two in a rural community: for example some public service mobiles stop at schools.

The two types of service did, however, seem to be moving away from one another.

Our relationship is quite distant. Children's Book Week is the only time we really get together.

The *Primary School Library Survey*, published in March 1991, gave a picture of SLS relations with schools. Table XXXVIII shows schools' general satisfaction with the service^[44]. Results are similar to those of the *Post-Primary School and College Libraries in Northern Ireland* of 1988^[43] which gave 93% of principals rating the SLS as satisfactory; 7% as unsatisfactory.

Table XXXVIII : School ratings of SLS, Northern Ireland^[44]

Board Area	B.E.L.B.	N.E.E.L.B.	S.E.E.L.B.	S.E.L.B.	W.E.L.B.	Average
Unsatisfactory	2.63%	0.00%	3.85%	4.88%	17.07%	5.69%
Satisfactory	55.26%	41.18%	50.00%	46.34%	65.85%	51.73%
Good	42.11%	58.82%	46.15%	48.78%	17.07%	42.59%

Although SLS in Northern Ireland had not begun to talk of service level agreements, Belfast was beginning to design performance indicators and the SLS of the South-Eastern Board had set down minimum service standards of one stock inspection and one advisory visit annually for each school. Belfast SLS had also consulted schools on the type of service needed, and found that 98% wished the present form to continue.

In summary, one sees the situation in Northern Ireland as similar to but not the same as that in England and Wales. Change for SLS was coming partly through educational reform, but was also influenced by the wider concerns of local government. However, the 18 month period under review was largely one of waiting, of preparing cases and watching the results of ERA, rather than one of radical change. Further, while in England there were SLS which were precipitating change or were ambivalent about selling services, in Northern Ireland there was a clearer unity in the belief that a centralised system better served schools.

Scotland

The situation in Scotland regarding educational change has already been described in Chapter Five, and this did not alter substantially from April 1990 to September 1991. The impetus was still from curriculum reform, described by David McNicoll, chief executive of the Scottish Consultative Council on the Curriculum (SCCC), as going 'with the grain of Scottish education' and being

'guidelines not tramlines'[45]. As The Times Educational Supplement reported in September 1990:

The 5-14 programme is attempting to carry off the trick of combining professional discretion for the teacher with national prescription - without, so far, a legislative fist in sight[46].

If there were doubts they were of the growing politicisation of education following the appointment of Michael Forsyth as the Scottish Education Minister and a consequent shift to the right. This manifested itself during 1991 on the issue of testing pupils, and tensions arose with SCCC. Offsetting such moves by the Scottish Office Education Department (the significantly renamed Scottish Education Department) was a belief, at least among seminar participants, in the ability of the authoritative and well-regarded SCCC to surmount such difficulties. A particular strength for the Council was the success of the curriculum reforms. By Spring 1991 a typical comment was 'the 5-14 programme is really moving'.

A new element arose mid-1991 with the publication of *The case for change*[47], which outlined proposals for the reorganisation of local government in Scotland, as part of the Department of the Environment's wider review of local government. The paper brought forward familiar views on the enabling rather than providing role, signalled the demise of the present two-tier system, and contained a hint that schools and colleges might move to central government control.

Although the coverage of education legislation was different in Scotland, several social and political issues were similar. For example, the presentation on current emphases in education by Alan Watson, Director of Education for Tayside Region, at the Perth seminar in March 1991 cited:

Accountability; The consumer dimension; Cross-phase continuity; New roles for LEAs; Contracting resources.

The list could have been identical south of the border.

Whatever the future pattern of local government - or perhaps as a protection against change - the restructuring of Education Departments so prevalent in England and Wales post-ERA was apparent in Scotland also, for example, in Strathclyde's Department of Education. Again, emphases were familiar: quality assurance, monitoring of effectiveness, educational audit. The main change for Strathclyde was the establishment of an Inspectorate and Staff College, plus a clearer definition of the Advisory Service's role. The restructuring involved only the existing financial resources, and in the process there was a drastic reduction from 100 to 30 of advisory posts. The changes brought a greater distinction between strategic management, which was centralised, and operational management, which was devolved.

Strathclyde is the largest local authority in the United Kingdom - and, indeed, in Europe - with a population of 2.4 million.

Education is administered through six geographical divisions, a system which in the SLS field led to a variety of standards and fragmentation of effort. It is therefore gratifying to note that in the reorganisation of the Education Department a new post was created, that of Regional Adviser, Education Resource Service.

The policies of Strathclyde Education Department have already been indicated: to a large extent they are similar to Tayside's. As part of the policy for devolution of management, Strathclyde decided to devolve part of the SLS budget, giving each secondary school a budget of £2,000. Here one can see, interestingly, delegation of library budgets coming not through education legislation but through local policy decisions. Devolution of part of the library budget to schools brought a corresponding loss of revenue to the SLS, and, as the head of service began to see further delegation inevitable, estimates of the cost and value of services were produced. Opinions vary on the delegation issue, and several participants in the Perth seminar saw no political support for - in the Scottish phrase - Devolution of Management of Resources (DMR).

As for service range and level, it is difficult to give information on the situation in the whole of Scotland. LISC (Scotland) commissioned a survey covering 1988/89 from LISU, but this was not published because of doubts as to the soundness of the data in view of the different bases of calculation. In addition there was some disquiet at the necessarily partial picture such exercises give, since they are unable to show the quality of services.

In the Lanark Division of Strathclyde considerable change took place in the SLS in the period under review, not because of the pressures of legislation but as part of a reflective and imaginative approach to the unit's work. The SLS had been on a standstill budget since 1979/80, and, although its total budget of £1 million may seem high, had necessarily adopted a system of continuing review. Lanark's SLS is atypical both in Scotland and in the United Kingdom, partly because of the high proportion of the materials budget given to such items as artefacts, periodicals and on-line services, and partly because of its unique use of mobile libraries. The changes occurring from April 1990 onwards arose from a wish to forward regional and departmental policies, to support the curriculum more closely and to use staff and materials resources to the best effect.

The mobile libraries had been used for some time for subject exhibitions linked with teachers' notes, workshop sessions for school staff and presentations to pupils. The scope of these exhibitions was extended to cover the years Primary 7 to Secondary 2, themes were wider (e.g. Equal Opportunities and Health Education) and developed in collaboration with Advisers. They were being introduced through pilot schools, and there was a hope that they could be offered on a regional basis, with consequent income generation.

Faced with a widespread problem - that of increasing demands on the labour-intensive project service - a new approach was being piloted in Summer 1991 with four secondary schools.

The 5-14 programme and new financial methods give an opportunity to change. We are asking primaries for their topic plans for each academic year and then sending out enough material for a cluster of primaries to their secondary school. The collection will be managed by the secondary school librarian who, as a professional, will be able to discuss use of the material direct with primary teachers. The new idea may also raise secondary awareness of topic materials and information skills.

The SLS was assisting 20 self-help groups in the Division looking at implications of the reports of RDG (Research and Development Group) 1 and 2 on mathematics and language - the nearest equivalent of reports of NCC working groups. The SLS head was convenor of a group promoting information skills as part of TVEI extension, which had been instrumental in producing two booklets, *The inquiry Framework* and *Information skills definition*. Another innovation was production of *Boxes of delights*, an annotated list with suggestions for activities which accompanied boxes and baskets from different parts of the world filled with related artefacts and books. The SLS was looking to automate its operations to free staff for the more intensive role in curricular support which was increasingly being sought.

Other reports, such as *Information providers in the school library field*^[48], have drawn attention to the good channels of communication in Scotland, and this present study reinforced that

view. Nationally, the close relationship of the Scottish Library Association, SLIC and HMI - apparent at the Perth seminar of March 1991 - helps SLS managers as they face changes. At Perth, Arthur Maltby HMI suggested a range of strategies for achieving support from the Scottish Office and influencing the Scottish Office Education Department. Further, it was decided to make a similar seminar an annual event.

In terms of relationships with the parent department, both the Lanark study and other contacts showed the value of an education base for SLS. The point was reinforced in a *Times Educational Supplement* article of March 1991 on the Lothian SLS^[49]. The Lanark history showed many of the advantages - for example, the attendance of the SLS head at meetings of education advisory staff and the easy cooperation in new initiatives.

Relationships with schools had not moved in Scotland to a seller and customer basis, but at the Perth seminar Alan Watson drew on *Planning for change : strategic planning in local government*^[50] to suggest a change from running services to achieving results, from administration to management. In Lanark the SLS was developing its service in response to school needs, was involved in close working relationships through its exhibition and INSET programmes and its pilot schemes. The recent delegation of some of the SLS budgets was viewed positively, as bringing even more need for advisory work.

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CHAPTER SEVEN: MANAGING SCHOOL LIBRARY SERVICE CHANGE

1. The nature of change
2. The sources of current SLS change
3. Strategic management
4. Change in practice
5. Changing people
6. The effective School Library Service

CHAPTER SEVEN : MANAGING SCHOOL LIBRARY SERVICE CHANGE

1. The nature of change

The ambivalence of SLS - caught between the disciplines of education and librarianship - has been apparent in this study. There are no handbooks on management of SLS change and, in their absence, heads of service turned sometimes to one field, sometimes to the other and, increasingly, to the field of management. It must also be admitted that a number turned to their own resources or those of colleagues, rather than professional literature.

There is evidence, though, that understanding of the nature of change came particularly from the education field, through the work of Michael Fullan. His *The meaning of educational change*^[1] became known through seminars for SLS heads held in the period 1985-88, a time when SLS were heavily involved in school library development. Fullan's influence was also apparent in works relevant to SLS published at that time, for example, *School libraries on the move*^[2] and *The learning school*^[3].

Among Fullan's insights valuable today, one can cite:

Change is a process, not an event, with three stages of initiation, implementation and integration.

The outcome of educational innovation is determined by change in practice along three dimensions - materials, teaching approaches, beliefs.

To be successful, those initiating change need to consider the subjective realities of the people involved.

Individual implementers must work out their own meaning of any significant innovation, and this process will bring amendment of the original plan.

Effective change takes time.

The revised version of Fullan's work, published in 1991 as *The new meaning of educational change*, reinforces the need for change innovators to recognise the 'multiple realities' of those involved, especially where security and self-identity are threatened. It emphasises that changing structures is useless without changing cultures^[4].

Fullan's thinking has influenced the methodology of this study, which has sought to consider the different perspectives, situations and cultures of the people involved in SLS change, and the different strategies employed. His perceptions on the nature of change provide a context in which to consider the management of SLS change, as the requirements of ERA began to be implemented.

2. The sources of current SLS change

The sources of current change for SLS have already been indicated in Chapter Five (The effects of ERA) and Chapter Six (External factors). These earlier sections show the complexity of the cause-and-effect chain, and the way in which a web of national values and

local government priorities has become enmeshed with three pieces of legislation covering the community charge, compulsory competitive tendering and education reform. Both in the study's contacts and the literature there was agreement that ERA was not the only force behind SLS change. Participants in the December 1990 seminar held that 'the main areas of change stem from central government and the poll tax'^[5]. Margaret Kinnell, writing in 1991, reported that 'the impact of LMS and CCT is already changing the culture of library services' and perceived that

the reality is that the culture in local government is moving apparently inexorably to a more business-like orientation...^[6].

The complexity of the central/local government relationship was the theme of a 1990 article by David Wilson. His observations as to the likelihood of government objectives being fulfilled completely fit with Fullan's views on the difficulty of carrying through large-scale change. The article explains why a single piece of legislation can have different effects in different localities, and also confirms the resilience of local government.

Yet while the experience of local government has been one of decreasing autonomy, central government has still not achieved its desired control. Intervention is endless: control is rather more uncertain^[7].

By mid-1991, further change was forecast for SLS following publication of discussion documents from the Department of the Environment, the Scottish Office and Welsh Office, which put forward proposals for change in local government purpose, structure and funding^[8]. The atmosphere was heightened in Autumn 1991 by preparation for a General Election early in 1992. Several opinion polls of this period favoured the Labour Party's policies on education rather than those of the Conservative Party, and one can perhaps see their influence in the surprising concession made by the Secretary of State for Education in October 1991, when he reduced the proportion of LEA central expenditure allocated to grant-maintained schools^[9]. A new factor, announced in Autumn 1991, was a proposed review of the public library service^[10].

Chapters Five and Six have shown that change for SLS has come as a consequence of both government legislation - especially the Education Reform Act - and of local government policies. They have also noted the influence of social values. Less has been said of professional pressure for SLS to change. Here it may be observed that the Library Association was occupied at this time largely in protective moves in regard to SLS. Its guidelines on school libraries - which included a section on SLS - were still unpublished in Autumn 1991 and, in draft, offered no new models. The great activity in promoting information skills, which had been a national phenomenon, had died down, largely through the pressures of ERA. Individual SLS had proposals for change which were professionally inspired, but no single professional concern could be cited as a major source of change. Overall, whether the source

of change was coming from national or local level, the main change facing SLS in this period was imposed from outside. As one SLS manager put it:

Decisions are being made about SLS, but not by SLS.

Fullan emphasises the importance of participants feeling ownership of change. This is difficult to achieve with imposed change, and later sections of this chapter will look at the response of SLS managers.

It has been noted that SLS change in the United Kingdom is multi-rooted and it is, perhaps, consoling that a similar situation can be observed elsewhere. For example, New Zealand in 1991 had begun a review of its school library support service, largely in order to ensure value for money and increase the autonomy of schools. Change, proceeding from a variety of factors, was seen as a major challenge for school libraries and their support agencies in the United States also.

Change - rapid and pervasive - may be the single most important characteristic of life in the twentieth century^[11].

Many of the wider trends making for change in North America were relevant to the United Kingdom - hence the popularity of Tom Peters' handbook, *Thriving on chaos*, which offered practical advice, but also warned that 'Predictability is a thing of the

past^[12]. Similarly, Naisbitt's list of ten megatrends (e.g. moves from institutional help to self-help, from hierarchies to networks) provided a valuable global context for discussion of educational change in the United Kingdom^[13].

3. Strategic management

The literature on the management of change is now so vast, and makes use of such a variety of terms, that some definitions are called for at the beginning of this section. Quinn in *Strategies for change* offers the following:

A strategy is the pattern or plan that integrates an organisation's major goals, policies and action sequences into a cohesive whole^[14].

One is therefore focusing on planned change, defined by Elliott-Kemp as:

Directional or goal-based change which is a conscious rational response to a felt need. The change is thus the consequence of diagnostic and decision-making processes, and will be subject to evaluation in the light of the needs analysis^[15].

Lacking specific guides to strategic change for SLS, heads of service drew on a wide range of sources. The works mentioned most frequently in interviews were those of Fullan and Peters already

noted in this chapter, plus *In search of excellence* by Peters and Waterman^[16]. The interest in strategic management was keen, and over half of the case-studied SLS had adopted a strategic approach to change, usually influenced by the practice of the parent department or authority.

It is important here to distinguish between the process and the end result. The first has certain classic steps, clearly revealed in the literature even though terminology may differ. For example, the Audit Commission sees that local authorities move from a vision, to a strategy, to management systems^[17]. Susan Curzon, in a practical manual on library change, identifies nine steps, which also begin with envisioning, and move on to planning, managing the individual, implementing and evaluating^[18]. A shorter sequence is provided in *Planning for school development*^[19], which has much to offer SLS managers.

Audit - where is the school now

Construction - what changes are needed; specific targets

Implementation - managing the changes

Evaluation - check success.

Johnson and Scholes identify three elements of strategic management^[20]

Strategic analysis - review of the organisation's environment, resource strengths, aspirations and values;

Strategic choice - generation of strategic options,
evaluation and selection;

Strategic implementation - translation into action,
key tasks, structures.

Although these elements have been set out in simple linear sequences, strategic management is not just a series of neat steps, but a much more complex process concerning organisation-wide issues in the context of a web of environmental influences. As *Implementing organisational change* notes

Every organisation is a unique blend of change variables: systems, style, structure, skills, staff, strategy, and something we call shared values^[21].

This helps to explain the different conclusions reached on the future of the SLS - even where the process of analysis used was similar.

Section 3 (Policies) of Chapter Six has already noted the interest in strategic management in a significant number of the contact authorities. A conscious move to an authority-wide strategic plan was apparent in the following:

Berkshire; Cambridgeshire;

Hillingdon; Wandsworth;

Birmingham; Bradford; Kirklees.

In addition, there was a strong strategic approach at departmental level in the library departments of Norfolk and Solihull. Hampshire was the only case where a strategic orientation appeared to have been developed at SLS rather than departmental or authority level. The growth of strategic management was apparent outside the contact authorities also. Section 6 of Chapter Six has given examples from Northern Ireland and Scotland, and others within England were gathered in the course of the study.

However, as so often when theories are applied to actual situations, one perceives gaps in the process. Using the elements identified by Johnson and Scholes (p. 305-6), this section will attempt to see how these tasks were carried out in practice.

Strategic analysis

Policy statements quoted in Chapter Six provide evidence that local authorities and individual departments were taking into account characteristics of the external environment when formulating new service plans. These included social values, government legislation and advice, and local factors such as economic trends and special community needs. The Education Reform Act was an important element, usually seen as both opportunity and threat, as in Birmingham's strategy document *Into the 90s*.

The impact of this Act cannot be over-emphasised. It provides great opportunities for delegating power to

local communities and involving the customers in major decisions. At the same time it can be seen as a threat to local government and its long-standing methods of delivering services.

Often this process of analysis was undertaken, at authority or departmental level, by consultants. For SLS there was an obvious trickle-down effect from analyses undertaken elsewhere in the hierarchy. Discussions with SLS managers showed them well aware of the macro-issues, but more likely to concentrate on factors in the immediate environment, such as LEA policies.

Analysis of resource strengths took many forms. Some SLS produced statistics of total stock, some listed the range of services offered ('Our strength lies in having resources and expertise'): a few saw their strengths in terms of goodwill ('We have a very high profile in secondary schools'). It is probable that, overall, SLS under-rated their strengths: this was certainly apparent in exercises used in the two LA seminars, 'Going commercial'. Here assets such as delivery systems, information networks, and professional qualities of impartiality, were often overlooked.

Analysis of aspirations and values fared less well - as has been noted in Chapter Six. This may be because librarianship, like teaching, is essentially practical, or it may be because of the pragmatic attitude developed in response to externally imposed change.

Application of this stage of strategic management was hampered by the rapid changes in the external environment, for example changes in DES requirements, in local government funding, and in the national economy.

Strategic choice

The amount of choice available to SLS managers varied in the contact authorities, but the core decision of budget delegation or centralisation was usually made at authority or education department level. In deciding between these options, senior officers or committees appeared guided mainly by political or economic factors. The quotations below illustrate the point.

The Education Committee has no spirit to delegate budgets.

Choices have been made by members, following the consultants' report. The SLS was just swept up in that.

I do believe that it's more economical to fund the SLS centrally, but the decision was made higher up that the service is so successful it would be easy to sell.

In these circumstances, SLS choice was limited largely to service design, costing and promotion. There were opportunities here for a strategic approach - as in the decision of the SLS in Leicestershire to recommend that project loans should not be part

of core service, so safe-guarding income. Yet such sophistication did not occur to a number of SLS, and one can understand why one head of service commented: 'I do not see many options open to the SLS'.

Strategic implementation

Johnson and Scholes take under this heading the translation of plans into action, key tasks and structures. Here SLS seemed at home, with several examples among contact authorities of year or medium-term plans, some with work targets or (more occasionally) financial forecasts. As with other aspects of strategic management, the motivation to produce such plans stemmed in most cases from the department or authority.

Considering the authorities committed to strategic management, one notes that sometimes the SLS was seen to be impeding the authority's purposes, sometimes advancing them. So, one SLS with a centralised budget was described as 'bucking the trend', and unlikely to be in that position for long. Another had its budget delegated against consultants' recommendations because 'If we make an exception for you, others will follow'. Two SLS with delegated budgets were described respectively as 'our flagship' and 'offering a model of partial delegation which could be applied elsewhere'. This history reinforces the view of one SLS manager.

ERA is at present having a dramatic effect on some SLS, less on others, but there is a political momentum in which all will get caught up, and it will result in their budgets being devolved.

Some SLS thought of the process of redirecting services as essentially a marketing exercise. Marketing was a recurring theme in interviews and seminars, confirming the result of the study's questionnaire, where marketing was placed top of service priorities. In some authorities marketing was equated with publicity, but among the contact SLS there were cases where marketing was recognised as a cycle of activities, i.e.

Setting management objectives, inspiring the right attitude, identifying and segmenting the market, product/service development, promotion and publicity, public relations^[22].

Four of the 14 contact SLS were helped in this process by marketing expertise from within or outside the department.

In Berkshire, a marketing orientation had begun to permeate the SLS as early as 1989, when consultants were commissioned to review service to secondary schools. Their report, *Library services into the 1990s*, follows broadly the process of strategic analysis, and makes recommendations for developing a successful marketing strategy. By Autumn 1991, a significant proportion of the SLS in contact authorities had undertaken some market research. Again, the variations are interesting in the light they throw on local cultures. Two SLS were not permitted to distribute a questionnaire. Those which did carry out a survey used a range of methods (sometimes in combination), including working parties of headteachers, school visits, questionnaires, and the convening of special meetings. Wandsworth undertook a thorough market positioning exercise, looking both inside and outside the borough.

This type of research - however conducted - helped in service design.

Similarly, most SLS in contact authorities had taken steps to price their product. Table XXXIX shows the calculations for LEA schools, as at October 1991.

Table XXXIX : Costings of SLS

Authority	Service costs and comments
Berkshire	A series of costings has been established, based on school size.
Cambridgeshire	Secondary schools: subscription service of £2.30 per pupil, or 'Pay-as-you-use' service covering project loans (£50); fiction exchanges (£2 per book); advice (£25 an hour).
Hampshire	Primary: £3.71 per pupil + £195 per school; Secondary: £2.58 per pupil + £529 per school.
Norfolk	Costings in process.
Kensington & Chelsea	Project loans £39; Advice £20 an hour.
Wandsworth	Advice £125 per day. Costs for add-on services being established. Voucher scheme for core service.
Hillingdon	Original costings being revised because of new LMS proposals. Subscription service plus à la carte.
Birmingham	Costings not yet established.
Bradford	Costings prepared for non-LEA schools only.
Kirklees	A complex of costings drawn up. Likely to offer a core service on subscription, plus charged extras.
Solihull	Current service costs, not charges calculated. Projects £39.67; bulk loans 61p per pupil; advice £18.41 an hour; INSET £290 per course.
West Glamorgan	Costings in process.

Money was a dominant theme for SLS from April 1990 onwards, not only because of uncertainty about their budgets, but also because it became ever more necessary to cost operations. SLS managers were clearly exercised as to the best formula to use for estimating costs. This was apparent during interviews and in the high demand for the two LA seminars, 'Going commercial'. Seminar members were advised by Ann Parker, Hertfordshire, not to fix costs too low, but among contact libraries there was a range of views.

We're using some services as loss leaders, to get schools in.

We've had to adjust our prices: they're just more than schools would bear.

Prices should be determined by competitive forces.

There are two kinds of service - cheap or quality. Some SLS are going for cheapness, but we have built up a reputation for quality and will stick to it, even though the prices are coming out high.

Apparent through the delegation plans (Table XXXVII) and costings is a growing divide between services to primary and secondary schools. While the National Curriculum was emphasising continuity, the effect of LMS on library support was greater differentiation between the phases. The consensus among SLS managers was that primary schools valued especially resources, secondary schools advice - a view upheld in their consultation exercises. Secondary

schools generally preferred budgets to be delegated and primary schools wanted a centralised facility, typical percentages being 80% of secondaries in favour of delegation, 80% of primaries against it. SLS staff were usually sanguine about this shift, many seeing it as overt recognition of a situation which had long existed.

Secondaries leaving would be no bad thing. With them, we are moving into a different range of resources far beyond the books where our expertise is strong.

We made a decision a year ago that we couldn't do everything, so now we concentrate on primary schools.

In summary, we find SLS - consciously or otherwise - engaged in attending to the four Ps of marketing.

Product: The design of new services, or adaptation of old ones, helped by consultation with clients.

Pricing: In addition to producing costings, some SLS calculated also the value of their services to the recipients, information which proved useful in negotiation and promotion.

Place: The general perception was that one base was more economical than several. However, just as chief officers and members were making decisions about SLS on political grounds so, in

turn, heads of SLS tended to reject, for political reasons, the closing of bases.

How can I say "Do buy our service, but, by-the-way, we're moving your nearby SLS centre"?

In operational terms it would be economic to have just one base, but members are anxious to keep local facilities, so it would be politically foolish.

Promotion: This was still low-key compared with the commercial world, but it was recognised as needing to take many forms other than formal publicity.

Strategic marketing and strategic planning can, in essence, be regarded as almost identical processes. Kotler, for example, identified the three core elements of the former as analysis, determining the marketing programme, administering the programme^[23] - steps almost identical to those of Johnson and Scholes already quoted. The history in this section and Chapter Six suggests a growing use of strategic management/strategic marketing techniques in local authorities.

Caulfield and Schultz, while advocating a strategic approach, found that throughout local government 'there is the deeply-held misconception that change and uncertainty render planning impossible',^[24]. This was borne out by Peter Edwards' 1989 survey, *Local management of schools*. None of the nine LEAs studied undertook 'radical analysis' and he commented disparagingly on the

'few authorities' which were 'adopting the mechanistic approach derived from industrial management systems'[25]. Strangely, while some managers had not yet adopted strategic management, others had moved beyond it, seeking a more dynamic and less structured approach to management. Peters and Waterman suggest that the analytical, rational model which 'dominates the business schools' has 'arguably led us astray'[26], while Peters holds that 'the unpredictability of innovation defeats excessive planning'[27]. Fullan, also, notes that 'the assumptions of policy-makers are frequently hyperrational', which leads them to believe that a change in procedures or structures will necessarily lead to improvements. Writers such as Fullan recognise that 'organisations do not behave in a logical, predictable manner' and urge managers to 'try to work this to their advantage'[28].

Perhaps the point to take away is that the processes of strategic management, however valuable, have their limitations. One sees this illustrated in some of the SLS studied. Too often their starting point in planning change was service protection, rather than the intuitive process described by Peters and Waterman as 'path-finding'[29]. Confidence in the core of SLS work - the book - seemed low.

The clearest example of a strategic approach was found outside the contact authorities, in Kent. A visit to Kent in 1991 showed the SLS taking a very conscious approach to the management of change, and using steps quoted at the beginning of this section. The process in Kent included:

Acceptance of the need for change;
Keeping staff informed and involved;
Mission statement preparation;
Market research, with full analysis of results;
Building of new service plans by staff teams;
Training programmes;
Promotion of the new service to schools.

4. Change in practice

This study attempts to consider the effect of ERA, not only through quantitative means, but also through the perceptions of those involved. This requires attention to their different situations, the cultures within which they operate, their perspectives, and the strategies which they employ. Section 3 of this chapter has noted different management strategies, and Section 5 will look more closely at personal perspectives. This section concentrates on situations and cultures.

Situations

Chapters Five and Six have documented some of the differences in situations - for example, in structures, budgets, service range and relationships. All, obviously, had an impact on the way in which SLS change was managed. Here, other aspects will be considered.

First, two SLS had problems in introducing authority-wide change because they were not providing an equal level of service to all

schools. The District organisation of the Lancashire SLS stemmed from a decision to give maximum power to Districts following the 1974 Local Government reorganisation. The disadvantages of the situation in terms of stock economy and service standards had been recognised since 1987, and plans had been prepared to reorganise schools and children's services on a regional basis. In the event, this failed, and a simpler scheme - to regionalise the SLS only - was approved in 1991, the catalyst for achieving the change being LMS. The District service basis must be seen as an example of political factors outweighing professional - or even financial - ones, and the time-scale of four years of negotiation, plus the eventual compromise, illustrate the difficulty of achieving desired change. The Assistant County Librarian commented:

There is a high degree of pragmatism in framing proposals. I have to take into account issues such as politics, budgets, unions, and staff attitudes to change.

By its diversity of service standards, the SLS failed to meet one of the criteria of Lancashire's LMS review team - a uniform level of provision - and, therefore, delegation of its budget was almost inevitable. Cambridgeshire, also, suffered from different service levels in the three SLS bases, and this made design of new service packages and contracts of entitlement very difficult to produce.

Another situational problem was inadequacy of the service provided. This was particularly noticeable in Birmingham, and to some extent

in Solihull. Both had the lowest per capita budget for materials and staffing ratios of all the contact authorities. Solihull saw a need for additional investment before marketing the SLS, and Birmingham fought - successfully - for a sounder service base before delegation.

Several SLS were also handicapped by lack of core management information, from something as basic as the number of pupils to more complex statistics of stock use. Here, improvement was observed during the course of the study, as SLS realised the importance of such information to the management of change. There was a growing use of information technology to provide statistics (e.g. on popular stock items/subjects or the monetary value of resources provided) and profiles of each school's collections. Sometimes the SLS drew on departmental systems (Berkshire), while others set up individual systems (Cambridgeshire, West Glamorgan).

The support - or lack of it - from other levels in the hierarchy was another factor which varied in different situations. Some SLS managers paid tribute to information and expertise available within their own or other departments; some based in library departments were protected financially by the parent department from the hazards of delegated budgets. A minority felt isolated or unsupported by the chief officer.

People talk about the management of change, but that's just rhetoric, because there's no guidance coming from the top.

Occasionally the SLS was seen as offering a departmental model of the way change should be managed.

The SLS is the trend-setter in our department. It's managed the way we want other sections to be.

This difference in situations goes a long way towards explaining why different choices were made from the options available to SLS managers.

Cultures

One of the hypotheses tested and found valid throughout the second year of the study was:

ERA, although national legislation, is not having a uniform effect on SLS, but is being mediated by local cultures.

Peters and Waterman had already found the influence of organisational culture strong in the business world.

Without exception, the dominance and coherence of culture proved to be an essential quality of the excellent companies^[30].

In this present study, the culture of the authority or parent department could be seen mediating the effects of ERA. Sometimes

local pride was an important ingredient - as in Birmingham, which had a strong perception of its history and present potential.

Sometimes the wish to demonstrate the independence of the local authority led to a deliberate distancing from government policies. At the other end of the spectrum we have Wandsworth, which gained a reputation of being a flagship for central government reforms^[30], or Berkshire, where a Conservative council produced a programme much in line with central government's thinking.

Sections on policy in Chapters Five and Six have already noted differences in culture which affected SLS, and shown that there was no neat left/right wing divide. Indeed, several of the Labour-controlled authorities studied pursued values more often associated with the Conservative party.

This is a pragmatic authority, with a concern for efficiency and effectiveness.

Be careful of labels. Labour doesn't always mean radical. We have embraced a lot of so-called Tory values.

The culture among local schools is another factor to take into account. In these days of customer primacy and the threat of GMS, the influence of headteachers and governors has increased. In Cambridgeshire, for example, the Chief Education Officer altered decisions in response to headteachers' complaints. In some places,

the power of heads was very strong: in others control was with chief officers and members. While, generally, heads' views on delegation carried considerable weight, in two cases among contact authorities their wish to retain centralised SLS budgets was overridden in favour of politicians' proposals.

One must also recognise the influence of the SLS culture - which was, in general, conservative. While the contact SLS were operating in a range of different ways by Autumn 1991 - with the status quo, earmarked budgets, partial delegation, or as autonomous business unit - there was a unity in their anxiety to survive. Often service decisions were taken at levels far above the SLS, but, wherever there was an opportunity to influence choice, SLS managers were seeking security and service continuation. Radical proposals for passing control of SLS to a commercial company (mooted by one contact authority and one other) did not come to fruition. Nor did the competition from library suppliers, which was once feared, materialise: instead, there were several examples of collaboration on purchase schemes. The culture of the book trade was supportive to SLS, with suppliers not wishing to become competitors.

The pace of change

A general complaint about LMS is the speed with which it has been implemented. The pace of change was a problem in most contact authorities, as managers attempted to carry out market research, cost and promote services - often at the same time as implementing other changes. For example, Birmingham was trying to establish the

SLS on an orthodox basis, Wandsworth and Kensington & Chelsea were both starting a service from scratch. Consultation with headteachers showed that they, too, were concerned at the pace of change, and worried that support services might disappear, or become greatly reduced, if new systems were brought in without careful thought. Some concessions were won on this issue, with several SLS - within and outside the contact group - reporting a delay of one year in implementing delegation plans, or initial operation on notional or earmarked budgets. Cambridgeshire and Norfolk were among authorities recognising that support services must be given sufficient lead time to adjust to a new commercial environment.

5. Changing people

The task of the SLS manager in relation to staff was clear: to motivate them to carry through change imposed from outside and posing as many threats as opportunities. It was an unenviable task, presenting an immediate personal dilemma for those heads of service who felt resentment at the changes, or unenthusiastic about new patterns. However, by Autumn 1991, the SLS managers in contact authorities had at least accepted that changes must occur, and understood that movements more pervasive than ERA were advancing those changes. Some heads of service were excited at the prospects ahead, especially those who had seized the initiative, rather than merely reacting to events.

I feel very positive about the opportunities available to the SLS to develop as an independent agency.

In 1989 there was a general feeling of gloom and doom, now we're through it.

We've got to run with the changes or get swamped.

Uncertainty has been the real problem. It's such a relief to be doing something instead of waiting and wondering what will happen.

It had been anticipated earlier in the study that SLS staff would find a tension between their traditional professional role and a new commercial one, but any tension found was slight and revolved mainly round a lack of training.

We're just working in the dark. We're not trained for business.

Perhaps the tensions were minor because SLS staff could perceive that services now matched teachers' needs more closely, or it may be that they saw a continuing place for their professional expertise. Many also recognised that the market ethos was beginning to pervade public services and schools, with the only likelihood of a reversal of the trend coming from a change in central government.

Faced with new challenges, many heads of service sought to learn new skills, through training provided locally, through professional groups, or the Library Association's professional development programme, which included in 1990 and 1991 several workshops relevant to SLS needs.

Apart from equipping themselves for the new SLS environment, heads of service had to help staff adjust to the changes. Most of those in the contact authorities were aware of the importance of good communication, of keeping staff informed and involved. As one service manager put it: 'Whatever happens, take your team with you'. In Cambridgeshire a joint training programme was in train, using a staff development programme beginning with 'Marketing of LEA services'. A letter to SLS staff of February 1991 reinforced the team approach:

...the SLS will not be successful because any one person believes that to be the case. Its success depends on us all...

Looking nationally, Kent was outstanding in regarding staff as a major asset, and in adopting a series of measures to help all of them view change positively⁺³¹⁺. The closeness to Fullan's emphasis on addressing the subjective realities of those involved in change is striking.

Two other points were observed during visits. The greater the changes being made in service, the more positive the attitudes of

support staff - which brings one back to the value of strategic planning as a way of anticipating and guiding change. Secondly, the level of optimism appeared to increase with the level of staff. Chief librarians were usually more confident of the future success of the SLS than service managers: heads of SLS were usually more confident than support staff. Taken together, these observations show the value of leadership qualities - a theme which came through in the interviews. Leadership of senior officers gave SLS managers the feeling of being supported in difficult times and optimism about the future. Confident leadership by heads of SLS diminished the anxiety of support staff: skilled leadership gave them a sense of control of change. Such findings are reinforced in the literature. Peters and Waterman, for example, speak of 'transforming leadership' which 'enables followers to transcend daily affairs',[32] and Sanday, investigating school effectiveness, found 'the single necessary factor is the leadership role of the head'[33].

Taking the 14 contact authorities together, one observed this 'transforming leadership' in just over half of the SLS heads. Overall, caution appeared the key quality. The sense of vision emphasised by the Audit Commission^[34] and reinforced by Caulfield and Schultz^[35] was often lacking, probably because of the nature of the change, i.e. imposed from outside and driven by market values. The differences also reflect the variety of status and experience among those designated in this study as 'heads of SLS'. These ranged from members of the senior management team in large

authorities to those at middle management level or below in smaller authorities.

6. The effective School Library Service

It is ironical that, while several SLS have produced measures for judging school library effectiveness, few had produced satisfactory measures for judging their own effectiveness by Autumn 1991. Again, while there are generally agreed criteria for numbers of stock etc. in school libraries, there is no such agreement on SLS provision. Guidelines did exist, published in the LA's *Library resource provision in schools*^[36] of 1977. This gave specific advice on staffing levels, the percentage of stock to be held at the SLS base etc., and offered model staffing structures. Such guidance was not given in the earlier edition^[37], and does not feature in the LA's 1990 paper, *School Library Service*^[38]. Among the performance measures gathered from individual authorities during this study, the most detailed framework was provided in Cheshire's *Measuring up*^[39].

The obvious source of help was the OAL manual, *Keys to success: performance indicators for public libraries*^[40], yet only one SLS manager encountered in the course of the study had made use of it. The complexity of this work, its orientation towards core public library operations, and the flaws identified by reviewers (e.g. inconsistency in terminology) all inhibited use. Potentially, it has an application for SLS, as the following summary of the four groups of indicators shows.

Operational performance indicators relate inputs (resources applied to the service) to outputs. This can be a simple exercise when output is defined as the amount of work accomplished. It is more difficult if one also takes into account the attributes of the outputs, such as quality, timeliness and accessibility.

Effectiveness indicators relate outputs to use, measuring both amount of use and user satisfaction.

Cost-effectiveness indicators relate input to use, indicating the result of investing resources.

Impact indicators relate use to potential use, and so represent the library's performance from the viewpoint of its funding body.

Although Keys to success had made little impact on SLS, several of its underlying principles had been adopted. The new customer-orientation of SLS brought an interest in measuring outcomes such as user satisfaction and amount of repeated use. In its present form, however, one cannot foresee the manual appealing to heads of SLS. Bloor has tried to provide an introduction for practitioners, to offset the 'complexity' and 'certain amount of obscurity'[41], but his account of its application in an academic library is hard to relate to SLS needs.

Sanday's review of the literature on school effectiveness has been helpful to this study, offering a starting point for the development of a matrix of factors making for SLS effectiveness.

Sanday's view of the importance of the head's leadership has already been noted in this chapter: he also found that schools were more likely to be effective if they had a development plan, if change was planned collaboratively, and attention given to staff development^[42].

Sanday does not define effectiveness, but Mercer, reviewing the literature on effective change in the education service, sees effectiveness related to the degree to which:

Goals are achieved;

The organisation runs efficiently;

The demands of important constituencies are met^[43].

Turning to insights from the business world, one finds again a problem of definition, with 'scholars and practitioners' reported 'unable to agree on the meaning and measurement of organisation effectiveness', according to *Implementing organisational change*. The authors do, however, test 'six basic approaches to effectiveness', which could be applied to SLS.

Planned and coordinated change activities;

Participative management;

Action research mode;

Delegation of accountabilities;

Results-orientation;

Open sociotechnical systems^[44].

In the absence of formal measures, time was given in interviews during the second year to establish factors making for SLS effectiveness, particularly in the light of changes post-ERA. A specific aim was to test two of the hypotheses formulated following the December 1990 seminar:

Certain common factors guide the management of a proactive response to ERA, even though structures and services may differ.

ERA is leading to new perceptions and measures of SLS effectiveness.

The two hypotheses were regarded by the senior officers and heads of SLS interviewed during 1991 as virtually duplicating one another, and the second was recommended as the hypothesis to retain. There was complete agreement as to its validity.

At the beginning of 1991 four factors making for SLS effectiveness had also been identified. These were:

Committed leadership;

Policies linked to the culture of the authority;

Customer consciousness;

Harmonious relationships with the funding/operating body.

These, too, were tested during the interview programme, and amended to produce a final list, similar to the first, but different in significant ways.

Committed and politically skilled leadership

The commitment is needed to carry the service forward, to envision its future, to take staff through the times of anxiety. The political judgment is needed to enable opportunities to be recognised and seized. Inevitably, the judgments reached were different - for example, on whether a centralised or delegated budget was more likely to be protected - but the important element is the political awareness and shrewdness which informs those judgments, and gives confidence to staff.

Positive relationships with the funding department

The most positive relationships were found where the SLS was part of the Education Department. This led to a more overt acknowledgement of the Education Department's responsibility for the service, and gave opportunities for SLS heads to integrate their work with other departmental concerns. This structure enables SLS staff to be better informed of educational developments, and of departmental politics and personalities, as well as providing a ready channel to policy makers on SLS matters.

This study has given many examples of the problems of separation - lack of interest by Education officers, frustration and isolation of SLS staff. The prevalence of such problems makes it clear that, where the SLS is separated operationally from the department with which it is functionally connected, particular effort has to be made to develop positive relationships. It is likely that the SLS

must accept the main role here, given the reality (in Bob Wilkes' phrase) of 'large-office politics'. No single route will be successful: rather one needs a network of contacts and methods, including joint projects and initiatives - several examples of which were found in contact authorities. A formal contractual relationship is also a valuable part of the network. Interviewees considered SLS policies linked to the culture of the authority as a necessary factor in positive relationships.

A particular challenge arises where the SLS is part of a directorate incorporating both library and education services. In a previous study^[45] I found such a structure working to the advantage of Bexley SLS, with the head of public library services playing a key role. The potential advantages had yet to be realised in the contact authorities, possibly because a number of the directorates were so newly established.

A practical benefit of good relationships can be seen in the decision, made in several contact authorities, to retain a percentage of the SLS budget centrally for advisory work.

Customer focus

The new awareness and wooing of customers represented the greatest change for SLS post-ERA, leading to fundamental reassessment of service design and delivery, and a new marketing orientation. This process, to be sound, had to be based on current information and so brought, in its train, better systems for gathering and

manipulating management information. Even the process of consultation - especially when it involved meetings or school visits - improved relationships considerably. In addition, it revealed the defects of the previous library-led service.

One head told me that the level of our project collections was consistently pitched too high. I said "Why didn't you tell us?", and he replied "Why didn't you ask?". That made me think.

Overall, there were many moves to change the situation, noted by one consultancy company, of 'insufficient dialogue between buyers and providers'. Nor was the initial round of consultation seen as the last one. SLS were designing ways to monitor customer satisfaction on a continuing basis, for example by user groups, sample surveys, and the careful structuring of professional visits.

There were many indications that SLS had begun to define 'customer' more widely, as the traditional role of assistance to school libraries was expanded. Cost-effectiveness merited further probing, with particular attention to the proportion of budget spent on overheads, compared with the amount spent on materials. The wide variations in the percentage of total budget spent on materials (from 35% to 63% in contact authorities) suggest a need for very careful marketing if customers are to perceive that the SLS represents value for money. There was also scope for an even sharper focus on curriculum support. There is a case for more radical service innovation in this respect, with products 'ever

more tailored to customers' particular needs' - a situation in which 'the distinction between goods and services begins to blur'[46].

Dependable service of high quality

The generally favourable view of School Library Services transmitted back through consultation exercises indicates that they are well regarded, but this does not mean that there is room for complacency. The contracts of entitlement, the specific targets being produced on response to requests etc., and the system of pre-packed project loans, will all lead to a more dependable service.

A clear commitment to quality was not apparent in all the contact SLS. Several were still struggling to respond to more demands than resources allowed: some had no uniform level of service. The advocacy of quality which permeates *Thriving on chaos* should give confidence to SLS managers that those who survive in these uncertain times will be the specialist producers of high value-added goods or services^[47]. There is work here for SLS, both in making relevant policy decisions, and in defining, in terms of customer perceptions, a quality service.

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CHAPTER EIGHT: CONCLUSIONS

1. The core questions
2. Hypotheses
3. Looking ahead

CHAPTER EIGHT : CONCLUSIONS

1. The core questions

This study set out to answer three core questions, recognising that some required statistical information, and others exploration of the perceptions of the people involved. This led to the design of a methodology which included data collection from authorities throughout the United Kingdom, as well as contact over a two year period with a smaller number. The case studies were carried out according, largely, to suggestions made in Yin's Case study research^[1], and this framework proved helpful in achieving consistency and validity.

Question One: What is the current state of School Library Services?

This first question was concerned particularly with the state of SLS at the outset of the study. Answers are contained in Chapter Five, which shows the situation in the period October 1989 - March 1990. That chapter covers the variables identified as appropriate indicators of change, i.e.:

Structures; Policies; Service range and level; Relationships.

and this summary follows the same order. Structures were beginning to show signs of strain, which was reflected in relationship tensions. In particular there were problems inherent in the running by Library Departments of services on behalf of another

department, and there was a strong feeling that integration of services to children and schools was working to the disadvantage of children. Only a minority of SLS were operating within a policy framework. Service range reflected an orthodoxy drawn from earlier decades: levels of service (e.g. expenditure and staffing per pupil) varied widely. As for relationships, the tensions most frequently reported were those between SLS and Education Departments, with SLS regretting in particular the lack of interest and guidance.

There had not been time for the effects of ERA to be fully realised, but heads of service felt considerable anxiety about the future and put service marketing as their main priority. Yet, although SLS generally identified problems, they all also reported developments, some of which were related to ERA.

Question Two: How is ERA affecting these services?

Chapter Five showed some of the early effects of the Education Reform Act on SLS. Its full effect will not be clear for some years, but Chapter Six provides evidence that the Act had a major effect on SLS in the period April 1990 - September 1991. The main structural changes occurred at authority level - where ERA was only one (and not the prime) factor. However, there was also some departmental restructuring independently motivated. This was particularly apparent in Education Departments, and here ERA was given as the main cause. This wider restructuring resulted in new alignments for SLS, which usually brought them closer to education

interests. Within SLS, there were comparatively few changes in structure, but those which took place were attributed mainly to ERA pressures to provide a more economical and customer-led service.

Policy formulation, as part of strategic management, became more important. Again, this process was usually started at authority or departmental level, with SLS caught up in it. Interviewees saw factors other than ERA as the main agents of change, but SLS managers perceived the value of a strategic approach in dealing with concerns emerging from ERA, such as management of change or service entitlements.

The great differences in SLS expenditure continued, but new patterns of service were established in response to ERA, especially in regard to project loans. Alterations to service range were, however, fewer than might have been anticipated as SLS attempted to change, post-ERA, from service-led to customer-led agencies.

As SLS managers became more closely involved in discussions and negotiations with Education Department staff, relationships between the two tended to improve. However, the tensions noted in Chapter Five were still apparent. The most positive relations noted were in those SLS based in Education Departments. The relationship between services to schools and children became a matter of increased concern for several reasons, including the prospect of a pay service competing with a free one, and the growing distinction in ethos and specialism between the two.

Many of the changes for SLS could, then, be attributed to ERA, as encouragement of schools to opt out of LEA control exacerbated the effects of LMS. The complexity of the cause-and-effect chain has already been noted in Chapters Six and Seven, and must be emphasised in this concluding section. The brief answer to Question Two is that ERA was working to both the advantage and disadvantage of School Library Services. The National Curriculum brought extra money to many through government grants: in addition, it opened the way to simplification and closer targeting of project loan services. ERA also gave the impetus to a move away from provision of so-called 'background material' to that of core items needed for curriculum delivery.

Local Management of Schools did not in itself require SLS budgets to be delegated - as Michael Fallon pointed out to the Library Association in May 1991^[2]. Rather, it was a mechanism exploited for a range of reasons, both centrally and locally. Delegation was seen initially by most SLS as a major threat to their continued existence, but by September 1991 it had been accepted that partial delegation was likely to be the future norm. The need for change had been largely accepted, and with that the general mood had lightened. As so often happens, a fear faced proved to be a fear diminished. Two SLS operating with delegated budgets - Buckinghamshire and Lincolnshire - were able to report in Autumn 1991 that around 90% of local schools were using their pay service. Some other SLS, about to embark on delegation, expressed confidence about the prospect of success. At an October 1991 seminar^[3] one SLS manager commented:

Last October we were preoccupied with ERA and LMS. They're still there, but it's time to consider other professional issues now.

It was LMS that was the specific spur to the widespread redirection of SLS which occurred in this period, a redirection which brought closer attention to school requirements and the cost of services. Management information improved. One could probably say for librarians, as for education officers, that the managerial element increased at the expense of the professional component of work^[4]. On the debit side, LMS halted much of the school library development, led by SLS, which was a major outcome of the 1984 LISC report^[5] - partly because funds held centrally by LEAs diminished, partly because SLS priorities were elsewhere.

Conjecturing in advance on the effect of ERA for librarians, Virginia Berkeley had commented:

No change is without its possibilities for development and improvement^[6].

This proved to be true as far as ERA was concerned, in spite of the inconsistencies noted in the Act. The worst aspect of ERA, from the point of view of library services, (and, indeed, of LEAs) was the provision for grant-maintained schools. Government encouragement of opting-out made financial planning for LEAs extremely difficult, a situation several senior education officers thought deliberate. As one put it: 'We don't need many GMS to

destabilise the authority'. Representations from LEAs had some effect, as slight concessions on budgets for opted-out schools were announced in October 1991.

Some of the greatest damage to SLS came, not from the Education Reform Act, but from budget reductions caused by the Community Charge and subsequent fears of rate-capping. Behind that lay reductions in the Standard Spending Assessment, as part of central government policy. Closure threats to a number of SLS were averted in 1991, although budget cuts were suffered. Like the decision to close Ealing's SLS in March 1992 - announced in October 1991 - these problems stemmed from authorities' attempts to meet government financial targets. The immense change in the wake of ERA could not have been caused by one Act alone. One has to recognise that ERA was only one of a stream of government legislation and policies with similar aims, each reinforcing the other. Some had a long history. As far back as 1984 SLS had been considered 'under threat of abolition or serious curtailment' because of the 'government's policy of reducing local government expenditure'[7].

Question Three: Why are specific choices being made by SLS from the options available post-ERA?

As Chapter Seven has shown, the major changes for SLS were being decided elsewhere, at departmental or authority level. In these

circumstances, most SLS managers attempted to influence those decisions, but their scope for choice was relatively limited.

What, indeed, were the options available? Heads of SLS had a choice of service range, and tended to make changes to reflect school priorities. They had a choice of service name, but few made alterations, believing that, however confusing the name, it was at least established. They had a choice of struggling to keep budgets centralised or allowing them to be devolved, and only a few felt safe with the radical route. The biggest area of choice lay in the design and costing of service options, for example, distinction between core and add-on services, subscription or pay-on-use services. In all these, choice seemed governed by caution and considerations of saleability.

As 1991 progressed, the impending General Election - first expected in November 1991 and then anticipated in Spring 1992 - began to skew the change process. Several opinion polls of the period put the Labour Party ahead of the Conservatives, especially on issues such as education, and the Labour Party's manifesto *Arts and the media: our cultural future* included a specific commitment to SLS.

We will make the provision of a school library service a statutory responsibility on all education authorities^[8].

In this situation of expectancy and uncertainty, it was understandable that SLS managers generally opted not to precipitate

change. Indeed, in education circles resistance to the new legislation became stronger, not least in Northern Ireland. There the annual conference of the Association of Education & Library Boards passed a resolution demanding 'no further radical changes' and deploring the 'unwanted effect of educational reforms, which had proved detrimental to libraries, music and activities...'[9].

One has to pay tribute to the SLS heads who worked intensively to reshape services in response to ERA. Their protectiveness is understandable. This was a time of redirection of services in the light of customers' priorities, but it was not a time of radical solutions. There were no management buyouts, no setting up of brokerage systems. Nor did outside competitors emerge: the competition SLS faced was from other calls on school budgets. As already suggested, it was a time of management rather than leadership, of political acumen rather than entrepreneurship. Few heads of SLS were brave enough to follow the advice of one LEA senior officer.

Get on top of the wave. It's a great advantage to be seen to be doing that. The SLS can be a classic example of the best way to manage change.

2. Hypotheses

This study has followed a process of testing and amending hypotheses, and has ended with two which have been upheld.

The Education Reform Act, although national legislation, is not having a uniform effect on School Library Services, but is being mediated by local cultures.

The validity of this hypothesis has been shown in Chapter Six, which considered the changes in SLS from April 1990 - September 1991. Rarely have the major decisions rested with SLS: rather they have reflected the different priorities of each local authority, and the local pride which was a significant factor - and a rather surprising one in these days of diminishing local responsibilities. Among the contact authorities were those committed to central government policies, those sceptical of them, and those antagonistic to them. Some were keeping to the letter of the law, and others were embracing the spirit of ERA. Inevitably, results were different. One county's chief officer expressed it simply:

Local traditions and practices are very important,
and cannot be ignored.

Another called up Pope for an explanation:

'Tis with our judgments as our watches: none go just
alike, yet each believes his own^[10].

We are back here to Fullan's observations. Change involves an interaction of 'individual situations' with 'organisational and institutional factors'. Response to any particular reform requires 'integrating the more general knowledge of change with detailed

knowledge of the politics, personalities, and history peculiar to the setting in question'[11]. This is, of course, a major reason why nation-wide educational reform is so difficult to implement.

The Education Reform Act is leading to new perceptions of School Library Service effectiveness

The factors making for SLS effectiveness, which were identified during the case studies programme, have been set out in Chapter Seven, but it will be helpful to summarise them here.

- Committed and politically skilled leadership;
- Positive relationships with the funding department;
- Customer focus;
- Dependable service of high quality.

These are different in terminology and essence from the factors which might have been identified in October 1989 when this study began. A shift in values has occurred over the two years. This has moved SLS into the market place, making managers aware that survival depends not just on service costs, but on the value placed on the service by potential buyers. As one SLS manager explained:

Customer consciousness has become a key feature. You have this awareness all the time, whatever you're doing.

The four factors noted above represent the consensus view, but several others were suggested as valuable in the course of the study, among them 'Curriculum closeness'. This is clearly an essential factor in a curriculum support service, and one that was recognised by SLS managers when they put 'Knowledge of current educational developments' top of the list of staff training needs (Table XIX). Yet the degree to which SLS should be involved in curriculum development is still debatable outside Scotland: a significant number of SLS see their advisory function as limited to library organisation and management. Up to 1988, the trend was towards greater curriculum involvement, but ERA and associated changes halted what seemed an evolutionary process, diverting attention of SLS managers elsewhere.

3. Looking ahead

By Autumn 1991 SLS managers had been engaged for two years in re-orienting service, with the old demand-led basis giving way to a service based on clear costs, statements of entitlement, and contracts between buyers and providers. While one sees variations in pace and emphasis, the trend is clear. Whether budgets are to be delegated or centralised, services need to be saleable. We are back to Keith Osborne's comment:

In the end, it's what the customer wants that matters.

In *The meaning of educational change* Fullan identified^[12] three dimensions which had to alter for change to be effective: materials, teaching approaches, beliefs. Translating these into library terms, we have seen that materials selection changed to meet National Curriculum needs; service design changed in the face of LMS. As for beliefs, one could say that SLS managers had come to terms with the new market ethos, but conversion is another matter.

By Autumn 1991 several senior librarians perceived services to schools as at a watershed. Whatever the outcome of the next election, a return to pre-ERA conditions was unlikely. The aim must be to move from survival to effectiveness as supports to learning. A clue to achieving this may lie in three key words used in a 1990 report from the DES, *Starting with quality*^[13] - coordination, curriculum and quality.

Coordination Overall, SLS are still not close enough to the process of education, either at LEA or school level. Ironically, their position with the Education Department is much the same as that of the library in many schools - peripheral. The example of Scotland shows the coordination of effort which can be achieved when SLS are based in Education Departments. Within the contact authorities for this study, some of the greatest hope lies in those SLS within Education. The pressures for SLS to stay with Library Departments are strong, but if that pattern continues, much greater effort is needed to align SLS more closely to local agencies in education - and that effort should be two-way.

Curriculum In spite of redesign of project collections and establishment of some measures of user-satisfaction, SLS are still too often the selectors and deliverers of materials, not partners in their use. Here and there new posts have been created which do bring SLS staff into development work in schools, but there is scope for far more innovation in 'adding value to the educational process' - an Audit Commission criterion for centralised support^[14].

Quality The new service contracts will specify entitlement, in terms of numbers of visits, materials etc. It is harder to specify the quality of the advice given or the resources lent, yet this quality must be vital to service effectiveness. This is an area where national guidelines are likely to be inappropriate, although exemplar studies might be helpful. SLS managers have been observed in the past two years wavering between cheapness and quality, confidence in their product often low. Whether we look at the professional or commercial interests of SLS, the advice is the same: in this decade of uncertainty and change, it is the quality service which will thrive. That requires the management skills so evident over the past two years, and the leadership skills which have been less so. It needs product champions who will not only provide resources but promote learning.

This study has followed SLS through the period immediately following introduction of the Education Reform Act. It would be helpful to build on it by a further review in 1993-1994, for several of the provisions of the Act can be assessed only over a

long time-scale. It would also be useful to look at the receiving end, by some detailed case studies of SLS contribution to school learning programmes. The new Loughborough-based research project, Delivering the National Curriculum: the role of the school library, running from 1992 to 1993, should help in this respect. Overall, SLS have been perceived as reacting positively to ERA, and it is hoped that they will now feel confident to become stronger partners in learning development. To help that process, more formal attention should be given to monitoring SLS effectiveness, and to the national and local support SLS managers need in making this change.

A specific challenge will continue to be using the legislation to further professional hopes. As Fullan emphasises:

Demands for change will always be with us in complex societies; the only fruitful way ahead is to carve out our own niche of renewal and build on it^[15].

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APPENDIX A

QUESTIONNAIRES

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APPENDIX A

ENGLAND, WALES & NORTHERN IRELAND

LOUGHBOROUGH UNIVERSITY

DEPARTMENT OF LIBRARY AND INFORMATION STUDIES

SUPPORTS TO LEARNING: SCHOOL LIBRARY SERVICES IN THE UNITED KINGDOM

This questionnaire is an essential part of the first UK investigation of the educational support provided by School Library Services. Please help to make this British Library funded project a success by completing this questionnaire and returning it by March 1st 1990.

1.

Structure
- 1.1

Name of the authority
- 1.2

Name of the department operating the School Library Service (SLS)
.....
- 1.3

Name of the committee/sub-committee to which the department reports
.....
2.

Policy
- 2.1

Has your authority a policy statement on SLS?

[]

Yes

[]

No

[]

In preparation
- 2.2

If so, was the policy ratified by:

a) The Education Committee

[]

Yes

[]

No

b) The Library Committee

[]

Yes

[]

No

3.

Liaison

3.1

Does the impetus for liaison on SLS matters come:

[]

Mainly from the Education Department

[]

Mainly from the Library Department

[]

From both equally
- 363
- (14)

3.2 Is there a formal structure for Education/Library Department liaison on SLS (e.g. a steering committee)?

☐ Yes ☐ No

3.3 If so, has this liaison produced any specific results or benefits?

☐ Yes ☐ No

3.4 Would you rate Education/Library Department liaison on SLS as

☐ Very good ☐ Fair ☐ Poor

4. Education Reform Act 1988

4.1 Do you expect the SLS to experience funding cuts in

a) Phase One of LMS schemes (10%) ☐ Yes ☐ No

b) Phase Two of LMS schemes (7%) ☐ Yes ☐ No ☐ Not yet known

4.2 Is the SLS involved in the school review and monitoring programmes of local Education Advisers/Inspectors?

☐ Yes ☐ No

4.3 Is the SLS providing, or planning to provide, a charged service for opted-out schools?

☐ Yes ☐ No

4.4 Has the SLS developed any performance indicators/assessment procedures for judging the success of its work?

☐ Yes ☐ No ☐ In preparation

(Details would be welcome)

.....
.....
.....

5.

5.1

a) GCSE/Standard Grade examination

☐ Yes

[] No

b) The National Curriculum

☐ Yes

[] No

(Details would be welcome)

.....

.....

.....

5.2

☐ Yes

[] No

5.3

☐ Yes

☐ No

5.4

☒ Yes

[] No

[] Not yet known

(Details would be welcome)

.....

.....

5.5

a) Secondary schools

☐ Yes

[] No

b) Primary schools

☐ Yes

☐ No

c) Special schools

☐ Yes

[] No

5.6

☐ Yes

☐ No

6. Training

6.1 Is the SLS allocated funds for INSET from the Education Department?

[] Yes [] No

6.2 Please indicate any groups to which you are directing current INSET

- [] School librarians (either professional librarians or teacher librarians)
- [] School library ancillary staff
- [] Head teachers and deputies
- [] Subject and class teachers

6.3 Is the SLS providing any training for public library staff (e.g. on GCSE requirements)?

[] Yes [] No

6.4 What do you perceive as the main training needs of SLS staff?

.....

.....

.....

--	--	--

7. Priorities and problems

7.1 Please rank, by numbering from 1-9 in order of importance, the following service areas (No. 1 ranking highest)

- [] Bulk loans and stock exchanges
- [] Project loans
- [] Advice on library organisation
- [] Help in stock selection
- [] Assistance in formulation of library policy
- [] Promoting reading
- [] Promoting information skills
- [] Marketing the SLS
- [] Other (please specify)

7.2 What are the main current problems for your SLS?

.....
.....
.....

--	--	--

7.3 What do you see as development areas for your SLS?

.....
.....
.....

--	--	--

Please complete the final section below, in case any query on your return arises. This information will not be used in the analysis.

Name of person completing the questionnaire (Capitals, please)

Designation _____

Date _____

Please return by March 1st at the latest to:

Peggy Heeks, Farthings, Whitchurch Hill, Oxon. RG8 7PN (Tel: 0734-842437)

A reply-paid envelope for your use is enclosed

MANY THANKS FOR YOUR COOPERATION IN THIS PROJECT

APPENDIX A
SCOTLAND

LOUGHBOROUGH UNIVERSITY
DEPARTMENT OF LIBRARY AND INFORMATION STUDIES

SUPPORTS TO LEARNING: SCHOOL LIBRARY SERVICES IN THE
UNITED KINGDOM

This questionnaire is an essential part of the first UK investigation of the educational support provided by School Library Services. Please help to make this British Library funded project a success by completing this questionnaire and returning it by June 1st 1990.

1. Structure

1.1 Name of the authority

1.2 Name of the department operating the School Library Service (SLS)
.....

1.3 Name of the committee/sub-committee to which the department reports
.....

2. Policy

2.1 Has your authority a policy statement on SLS?

☐ Yes ☐ No ☐ In preparation

2.2 If so, was the policy ratified by:

a) The Education Committee ☐ Yes ☐ No

b) The Library Committee ☐ Yes ☐ No
 (or equivalent)

3. Liaison

Note: This section relates only to authorities where the SLS is operated on an agency basis

3.1 Does the impetus for liaison on SLS matters come:

☐ Mainly from the Education Department

☐ Mainly from the Library Department

☐ From both equally

- 3.2 Is there a formal structure for Education/Library Department liaison on SLS (e.g. a steering committee)?
- ☐ Yes ☐ No
- 3.3 If so, has this liaison produced any specific results or benefits?
- ☐ Yes ☐ No
- 3.4 Would you rate Education/Library Department liaison on SLS as
- ☐ Very good ☐ Fair ☐ Poor

4. Education reform and curriculum development

- 4.1 Have SLS staff been involved in discussion on curriculum development?

- a) Within the authority ☐ Yes ☐ No
- b) More widely ☐ Yes ☐ No

(Details would be welcome)

.....

.....

.....

- 4.2 Is the SLS involved, or about to be, in the school assessment programmes of local Education Advisers/Inspectors?

- ☐ Yes ☐ No

- 4.3 Is the SLS providing, or planning to provide, a service for opted-out schools?

- ☐ Yes ☐ No

If so, is there a service charge?

- ☐ Yes ☐ No

- 4.4 Has the SLS developed any performance indicators/assessment procedures for judging the success of its work?

- ☐ Yes ☐ No

(Details would be welcome)

.....

.....

.....

4.5 Has the SLS developed any measures for assessing school libraries?

[] Yes [] No

5. Special funds and services

5.1 Has the SLS received extra funds:

a) To support Standard Grade work [] Yes [] No
b) For other special purposes [] Yes [] No

(If so, please specify)
.....
.....
.....

5.2 Is the SLS involved in any major information skills initiatives with pupils in

a) Secondary schools [] Yes [] No
b) Primary schools [] Yes [] No
c) Special schools [] Yes [] No

5.3 Does the SLS operate a central purchasing scheme?

[] Yes [] No

6. Training

6.1 Is the SLS allocated funds for INSET from the Education Department?

[] Yes [] No

6.2 Please indicate any groups to which you are directing current INSET

[] School librarians (either professional librarians or teacher librarians)
[] School library ancillary staff
[] Head teachers and deputies
[] Subject and class teachers

6.3 Is the SLS liaising with public library staff on Standard Grade implications?

[] Yes [] No

6.4 What do you perceive as the main training needs of SLS staff?

.....
.....
.....

7. Priorities and problems

7.1 Please rank, by numbering from 1-9 in order of importance, your perception of the following service areas (No. 1 ranking most important)

- [] Stock exchanges
- [] Project loans
- [] Advice on library organisation
- [] Help in selection of resources
- [] Assistance in formulation of policy
- [] Promoting reading
- [] Promoting information skills
- [] Marketing the SLS
- [] Other (please specify)

7.2 What are the main current problems for your SLS?

.....
.....
.....

7.3 What do you see as development areas for your SLS?

.....
.....
.....

Please complete the final section below, in case any query on your return arises. This information will not be used in the analysis.

Name of person completing the questionnaire (Capitals, please)

Designation _____

Date _____

Please return by June 1st at the latest to:

Peggy Heeks, Farthings, Whitchurch Hill, Oxon. RG8 7PN (Tel: 0734-842437)

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MANY THANKS FOR YOUR COOPERATION IN THIS PROJECT

APPENDIX B

QUESTIONNAIRE RESULTS

5. Special funds and services

5.1	Funds allocated to SLS for GCSE	20%
	Funds allocated to SLS for National Curriculum	16%
5.2	SLS bid for 1990/91 ESG funds	75%
5.3	Bid accepted by Education Department	43%
5.4	ESG bid successful	22%
5.5	SLS involvement in information skills with pupils:	
	Secondary schools	43%
	Primary schools	45%
	Special schools	12%
5.6	Central purchasing scheme operated by SLS	42%

6. Training

6.1	SLS allocated INSET funds by the Education Department	36%
6.2	SLS current INSET programmes for:	
	School librarians	72%
	School library ancillary staff	39%
	Headteachers and deputies	38%
	Subject and class teachers	67%
6.3	SLS provision of training for public library staff	54%

APPENDIX C

ANALYSIS OF LISU STATISTICS, 1987/88

ANALYSIS OF LISU STATISTICS, 1987-1988: ENGLAND AND WALES

	1	2	3	4	5	6	7	8	9
No. Authority	No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
<u>COUNTIES</u>									
E101 Avon	-	-	-	-	-	-	-	-	-
E102 Bedfordshire	85025	7.0	12146.4	36.8	63.2	8.84	2.35	5.2	26.6
E103 Berkshire	105302	7.5	14040.3	51.7	48.3	6.51	4.96	-	76.2
E104 Buckinghamshire	95274	7.5	12703.2	36.2	63.8	6.56	3.59	2.9	54.7
E105 Cambridgeshire	95674	7.0	13667.7	41.2	58.8	5.69	2.11	5.8	37.1
E106 Cheshire	147283	5.0	29456.6	27.8	72.2	3.58	2.11	5.8	58.9
E107 Cleveland	-	-	-	-	-	-	-	-	-
E108 Cornwall	67369	5.0	13473.8	45.5	54.5	5.64	2.76	9.2	49.0
E109 Cumbria	73393	7.0	10484.7	41.2	58.8	4.98	2.08	3.3	41.7
E110 Derbyshire	-	-	-	-	-	-	-	-	-
E111 Devon	129875	12.0	10822.9	64.2	35.8	3.67	2.16	-	59.0
E112 Dorset	52447	5.7	9201.2	44.9	55.1	6.19	3.14	5.6	50.7

	1	2	3	4	5	6	7	8	9
	No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
E113 Durham	92219	3.0	30739.7	33.3	66.7	2.30	1.00	4.5	43.7
E114 East Sussex	82155	-	-	-	-	3.94	1.45	2.6	36.7
E115 Essex	226940	-	-	-	-	4.00	2.64	5.2	66.0
E116 Gloucestershire	73414	6.0	12235.7	48.0	52.0	3.62	1.52	2.2	42.0
E117 Hampshire	210997	10.0	21099.7	47.6	52.4	2.92	1.61	3.0	55.3
E118 Hereford & Worc.	96091	7.0	13727.3	58.3	41.7	3.43	1.33	3.2	38.9
E119 Hertfordshire	155000	18.0	8611.1	58.1	41.9	8.06	4.22	9.1	52.3
E120 Humberside	-	-	-	-	-	-	-	-	-
E121 Isle of Wight	16770	2.0	8385.0	50.0	50.0	4.98	1.54	2.2	31.0
E122 Kent	218856	10.0	21885.6	52.6	47.4	2.03	0.96	2.6	47.2
E123 Lancashire	212433	17.0	12496.1	77.3	22.7	2.27	1.20	3.6	52.6
E124 Leicestershire	139202	7.0	19886.0	31.8	68.2	4.13	1.79	4.0	43.3
E125 Lincolnshire	83677	2.5	33470.8	25.8	74.2	2.93	1.35	6.4	46.0
E126 Norfolk	97975	5.3	18485.9	55.2	44.8	2.18	0.86	1.8	39.3

	1	2	3	4	5	6	7	8	9
				%					
	No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
No. Authority									
E127 North Yorkshire	97091	3.0	32363.7	23.1	76.9	5.40	1.44	4.2	26.7
E128 Northamptonshire	94440	8.4	11242.9	72.4	27.6	4.16	1.82	6.5	43.9
E129 Northumberland	46430	4.0	11607.5	57.1	42.9	6.83	4.67	6.2	68.4
E130 Nottinghamshire	140573	17.8	7897.4	54.9	45.1	7.94	4.32	4.0	54.3
E131 Oxfordshire	72423	8.5	8520.4	58.6	41.4	5.50	2.59	4.2	47.2
E132 Shropshire	60837	4.0	15209.3	66.7	33.3	3.88	1.86	5.1	47.9
E133 Somerset	62996	4.0	15749.0	29.4	70.6	6.33	3.69	4.9	58.3
E134 Staffordshire	156000	2.0	78000.0	15.4	84.6	-	1.56	6.4	-
E135 Suffolk	93026	9.0	10336.2	100.0	-	2.99	1.45	3.2	48.6
E137 Warwickshire	71210	3.5	20345.7	53.9	46.2	-	1.59	-	-
E138 West Sussex	89994	4.0	22498.5	49.4	50.6	2.04	0.69	2.9	33.7
E139 Wiltshire	80482	9.0	8942.4	52.9	47.1	6.85	2.39	3.5	34.9

	1	2	3	4	5	6	7	8	9
No. Authority	No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
<u>OUTER LONDON BOROUGHs</u>									
L301 Barking & Dagenham	22644	1.5	15096.0	60.0	40.0	4.17	2.71	16.7	65.0
L302 Barnet	21185	4.0	5296.3	57.1	42.9	12.13	6.12	0.8	50.5
L303 Bexley	-	-	-	-	-	-	-	-	-
L304 Brent	-	-	-	-	-	-	-	-	-
L307 Ealing	33566	1.0	33566.0	33.3	66.7	3.11	2.19	10.3	70.5
L308 Enfield	37757	1.0	37757.0	66.7	33.3	1.62	1.21	-	75.0
L309 Haringey	-	-	-	-	-	-	-	-	-
L310 Harrow	24721	1.5	16480.7	100.0	-	2.67	2.22	12.0	83.0
L311 Havering	38935	4.0	9733.8	72.7	27.3	2.49	2.49	12.9	100.0
L312 Hillingdon	33000	2.5	13200.0	51.0	49.0	-	1.67	1.7	-
L313 Hounslow	31283	2.0	15641.5	14.3	85.7	3.39	2.21	10.6	65.1
L314 Kingston on Thames	16988	1.0	16988.0	66.7	33.3	2.73	1.25	-	45.7
L315 Merton	20272	1.2	16893.3	100.0	-	1.43	0.31	1.8	21.8

	1	2	3	4	5	6	7	8	9
No. Authority	No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
L316 Newham	34791	2.2	15814.1	42.3	57.7	-	-	3.2	-
L317 Redbridge	30158	1.5	20105.3	100.0	-	4.11	2.47	8.6	60.1
L318 Richmond upon Thames	15373	2.3	6683.9	69.7	30.3	1.55	0.57	9.0	36.7
L319 Sutton	22043	1.5	14695.3	33.3	66.7	3.51	1.32	3.7	37.6
L320 Waltham Forest	30119	4.0	7529.8	53.3	46.7	6.75	2.77	13.9	41.1

METROPOLITAN DISTRICTS

M401 Barnsley	-	-	-	-	-	-	-	-	-
E402 Birmingham	166305	3.5	47515.7	46.7	53.3	-	-	-	-
M403 Bolton	44000	2.5	17600.0	41.7	58.3	-	1.05	3.5	-
M404 Bradford	80687	6.5	12413.4	50.0	50.0	3.72	1.34	3.7	36.0
M405 Bury	-	3.5	-	63.6	36.4	-	-	-	100.0
M406 Calderdale	31481	1.5	20987.3	55.7	44.4	1.26	0.25	1.7	20.2
M407 Coventry	48682	1.5	32454.7	42.9	57.1	2.97	1.41	2.7	47.3
M408 Doncaster	46090	2.0	23045.0	28.6	71.4	3.74	2.10	5.1	56.1

1	2	3	4	5	6	7	8	9	
				%					
No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials	
No. Authority									
M409 Dudley	45339	4.0	11334.8	44.4	55.6	4.17	2.14	6.3	51.3
M410 Gateshead	28272	3.0	9424.0	60.0	40.0	-	2.12	3.5	-
M411 Kirklees	61043	4.2	14534.1	53.9	46.2	3.38	0.25	5.5	7.3
M412 Knowsley	26493	4.0	6623.3	44.4	55.6	4.15	1.75	6.4	42.2
M413 Leeds	106990	2.0	53495.0	100.0	-	0.91	0.27	1.0	29.5
M416 Newcastle upon Tyne	36292	9.0	4032.4	29.0	71.0	-	2.43	10.0	-
M417 North Tyneside	31217	3.0	10405.7	50.0	50.0	3.78	1.78	5.4	47.1
M418 Oldham	35933	1.5	23955.3	42.9	57.1	2.47	1.06	3.5	43.1
M419 Rochdale	-	-	-	-	-	-	-	-	-
M420 Rotherham	50772	1.0	50772.0	29.4	70.6	1.79	1.24	3.4	69.1
M421 St. Helens	-	-	-	-	-	-	-	-	-
M422 Salford	38182	1.0	38182.0	40.0	60.0	2.11	0.94	3.1	44.7
M423 Sandwell	46853	4.0	11713.3	80.0	20.0	2.94	0.94	1.3	45.0
M424 Sefton	44050	1.0	44050.0	50.0	50.0	-	0.22	0.8	-

1	2	3	4	5	6	7	8	9
			%					
No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
M425 Sheffield	74029	6.0	12338.2	44.4	55.6	-	2.57	7.3
M426 Solihull	51805	1.0	51805.0	100.0	-	0.34	0.32	1.3
M427 South Tyneside	23909	1.0	23909.0	25.0	75.0	5.93	4.41	8.2
M428 Stockport	41666	-	-	-	-	6.65	3.46	-
M429 Sunderland	51967	1.0	51967.0	25.0	75.0	1.04	0.32	3.3
M430 Tameside	36344	2.0	18172.0	100.0	-	6.39	5.61	-
M431 Trafford	30000	2.5	12000.0	45.5	54.6	4.65	2.23	11.0
M432 Wakefield	47000	4.0	11750.0	100.0	-	-	1.79	3.9
M433 Walsall	46725	3.5	13350.0	46.7	53.3	3.77	0.86	0.3
E434 Wigan	49674	3.0	16558.0	60.0	40.0	2.56	0.75	3.1
M435 Wirral	49000	4.0	12250.0	40.0	60.0	5.14	2.39	3.1
M436 Wolverhampton	40182	0.5	80364.0	33.3	66.7	-	0.37	1.2

	1	2	3	4	5	6	7	8	9
No. Authority	No. of Pupils	Prof libns	Ratio of pupils /libns	No. of Prof libns	No. of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
<u>WALES</u>									
W501 Clwyd	63156	7.0	9022.3	50.0	50.0	3.52	0.77	5.8	21.8
W503 Dyfed	53529	6.0	8921.5	80.0	20.0	3.04	0.81	8.7	26.6
W504 Gwent	70740	1.0	70740.0	25.0	75.0	-	0.42	1.3	-
W505 Gwynedd	36482	2.0	18241.0	40.0	60.0	3.15	0.95	3.2	30.3
W508 Mid-Glamorgan	91969	-	-	-	-	-	-	-	-
W509 Powys	18134	-	-	-	-	6.87	1.16	28.8	16.9
W510 Rhondda	12899	-	-	-	-	2.71	0.65	4.3	24.0
W511 South Glamorgan	-	-	-	-	-	-	-	-	-
W512 West Glamorgan	-	3.5	-	46.7	53.3	-	-	-	-

APPENDIX D

ANALYSIS OF LISU STATISTICS, 1989/90

ANALYSIS OF LISU STATISTICS 1989-1990: ENGLAND AND WALES

	1	2	3	4	5	6	7	8	9
	No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil	Total spent per pupil on materials	No. of stock items per pupil	% budget spent on materials
ENGLISH COUNTIES									
Avon	131582	4	32896	-	-	2.21	0.82	2	37
Berkshire	104495	14	7464	64	36	7.53	4.72	-	63
Buckinghamshire	93491	8.2	11401	38	62	6.71	3.21	3	48
Cambridgeshire	97046	6.3	15404	39	61	5.59	2.30	6	41
Cheshire	147716	6.5	22725	34	66	3.97	2.48	5	62
Cleveland	-	-	-	-	-	-	-	-	-
Cornwall	67152	5	13430	42	58	7.10	4.10	10	58
Cumbria	74143	8	9268	47	53	5.29	1.89	3	36
Derbyshire	-	-	-	-	-	-	-	-	-
Devon	132000	9	14667	41	59	5.80	5.18	-	89
Dorset	80504	6.2	12985	43	57	4.75	2.30	4	49
Durham	94791	3	31597	-	-	2.51	0.94	4	38

1	2	3	4	5	6	7	8	9	
No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials	
East Sussex	82157	8.5	9666	55	45	4.42	1.69	3	38
Essex	215470	24	8978	89	11	3.59	3.24	5	90
Gloucestershire	74134	6	12356	55	45	4.44	1.61	3	36
Hampshire	209704	10	20970	43	57	3.45	1.77	3	51
Hereford & Worc.	94927	7	13561	-	-	3.79	1.52	5	40
Hertfordshire	155000	18	8611	58	42	7.49	4.72	0.4	63
Isle of Wight	17119	2	8560	50	50	4.72	1.75	2	37
Kent	-	-	-	-	-	-	-	-	-
Lancashire	213609	14.5	14732	78	22	2.49	1.26	4	51
Leicestershire	133765	6	22294	28	72	4.88	2.49	4	51
Lincolnshire	73767	4	18442	30	70	2.79	1.60	5	58
Norfolk	99938	4.8	20820	59	41	2.51	0.89	2	35
North Yorkshire	96262	3	32087	23	77	6.32	1.83	4	29
Northamptonshire	93005	8.4	11072	72	28	4.62	2.14	7	46

1	2	3	4	5	6	7	8	9
No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials
Northumberland	46916	4	11729	50	7.92	5.29	7	67
Nottinghamshire	138395	11.3	12247	46	9.34	5.42	4	58
Oxfordshire	72778	6.5	11372	52	6.46	2.61	5	40
Shropshire	59376	5	11875	71	4.64	2.22	6	48
Somerset	61070	4	15268	22	7.84	4.00	3	51
Staffordshire	153114	3	51038	22	3.19	1.75	7	55
Suffolk	91649	10	9165	100	4.80	1.55	3	32
Warwickshire	71395	4	17849	57	3.43	1.70	3	50
West Sussex	89032	4	22258	49	2.35	0.87	3	37
Wiltshire	-	-	-	-	-	-	-	-

(Surrey provides no formal SLS)

	1	2	3	4	5	6	7	8	9
	No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials
<u>OUTER LONDON BOROUGHs</u>									
Barking & Dagenham	21704	1.5	14469	60	40	4.88	3.05	18	62
Barnet	38824	3	12941	60	40	7.50	0.79	-	10
Bexley	-	-	-	-	-	-	-	-	-
Brent	31377	2.8	11206	62	38	7.43	3.42	-	46
Croydon	-	-	-	-	-	-	-	-	-
Ealing	-	-	-	-	-	-	-	-	-
Enfield	37591	1	37591	67	33	1.86	1.39	-	75
Haringey	40000	1.5	26667	50	50	1.88	1.02	1	55
Harrow	26130	1.5	17420	60	40	4.04	2.52	13	63
Havering	34556	4	8639	77	23	6.83	4.03	15	59
Hillingdon	33000	2.3	14348	37	63	3.48	1.03	2	30
Hounslow	31619	3	10540	55	45	-	2.55	11	-
Kingston on Thames	17262	1	17262	-	-	3.26	1.42	4	44

1	2	3	4	5	6	7	8	9
No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials
20651	1.1	18774	69	31	1.89	0.38	-	20
34678	2.8	12385	42	58	-	1.73	3	-
30753	-	-	-	-	4.90	2.59	9	53
15541	1	15541	67	33	1.93	0.60	9	30
21928	1.5	14619	33	66	5.23	1.62	4	31
31024	4	7756	57	43	4.69	0.31	13	7

(Bromley provides no formal SLS)

METROPOLITAN DISTRICTS

Barnsley	35563	2	17782	43	57	2.47	0.67	4	27
Birmingham	165000	3	55000	43	57	1.90	-	-	-
Bolton	46400	2.5	18560	56	44	2.90	1.15	3	39
Bradford	-	-	-	-	-	-	-	-	-
Bury	24000	3.5	6857	64	36	3.45	3.31	9	96

1	2	3	4	5	6	7	8	9	
No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials	
Calderdale	31397	1.5	20931	54	46	1.30	0.29	2	22
Coventry	47210	-	-	-	-	1.62	3	-	-
Doncaster	46046	2.5	18418	33	67	3.84	2.27	5	59
Dudley	46965	2.5	18786	33	67	3.76	2.23	-	59
Gateshead	-	-	-	-	-	-	-	-	-
Kirklees	61350	4	15338	69	31	4.47	2.00	4	45
Knowsley	27590	3	9197	40	60	4.28	2.04	7	48
Leeds	101222	2.5	40489	83	17	0.95	0.28	1	29
Newcastle-upon-Tyne	-	-	-	-	-	-	-	-	-
North Tyneside	31317	3	10439	91	9	4.31	2.06	6	48
Oldham	37002	1.5	24668	43	57	2.51	1.25	4	50
Rochdale	-	-	-	-	-	-	-	-	-
Rotherham	40828	1	40828	29	71	2.94	1.79	3	60
St. Helens	-	-	-	-	-	-	-	-	-

1	2	3	4	5	6	7	8	9	
No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials	
Salford	35298	1	35298	40	60	1.59	1.02	3	64
Sandwell	49086	3	16362	58	42	2.12	0.88	2	41
Sefton	42953	0.5	85906	50	50	-	0.03	1	-
Sheffield	68983	5	137966	34	66	5.26	0.72	2	14
Solihull	32028	1	32028	100	-	1.09	0.59	-	54
South Tyneside	24939	1	24939	25	75	7.43	5.61	8	76
Stockport	41443	1.5	27629	43	57	6.97	3.82	-	55
Sunderland	45981	1	45981	33	67	1.54	0.51	4	33
Tameside	34445	2	17223	100	-	6.91	5.89	-	85
Trafford	30000	-	-	-	-	-	-	12	-
Wakefield	45307	3	15102	55	45	4.23	2.16	4	51
Walsall	42905	-	-	-	-	2.61	0.61	0.4	23
Wigan	49338	2	24669	57	43	1.91	1.02	3	54
Wirral	51605	4	12901	40	60	4.38	1.61	4	37

1	2	3	4	5	6	7	8	9	
No. of Pupils	No. of Prof libns (fte)	Ratio of pupils /libns	% of Prof libns	% of Non prof staff	Total spent per pupil £	Total spent per pupil on materials £	No. of stock items per pupil	% budget spent on materials	
Wolverhampton	40864	1.5	27243	60	40	-	0.41	1	-
(Liverpool and Manchester provide no formal SLS)									
<u>WALES</u>									
Clwyd	63942	6	10657	46	54	4.13	1.54	5	37
Dyfed	54968	1	54968	86	14	3.27	1.04	8	32
Gwent	72415	3	24138	25	75	1.21	0.42	1	35
Gwynedd	35517	2	17759	40	60	3.69	1.19	4	32
Powys	18162	-	-	-	-	2.57	1.26	7	49
Rhondda	13118	0.8	16398	33	67	3.32	0.69	4	21
West Glamorgan	-	3	-	38	62	-	-	-	-
(Mid and South Glamorgan provide no formal SLS)									

APPENDIX E

ORGANISATIONS CONSULTED

ORGANISATIONS CONSULTED DURING THE PROJECT

Askews Library Book Supply

Association of Metropolitan District Education and Children's Librarians

Books for Students

Cambridge Institute of Education

Centre for Communication and Information Studies, Polytechnic of Central London

Children's Book Foundation of Book Trust

Educational Publishers Council

Her Majesty's Inspectorate

Library Association

Library and Information Services Committee (Scotland), subsequently Scottish Library and Information Council

Library and Information Services Committee (Wales)

Library and Information Services Council (Northern Ireland)

Library and Information Statistics Unit, Loughborough University

London Group of Senior Children's Librarians

Morley Book Company

National Curriculum Council

Office of Arts and Libraries

Peters Library Service

School Library Association

School Libraries Group of the Library Association

Scottish Library Association

Society of County Children's and Education Librarians

APPENDIX F

PROFILES OF CASE-STUDIED AUTHORITIES

Cambridgeshire

Lancashire

Hillingdon

Kensington & Chelsea

Birmingham

Bradford

West Glamorgan

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: Cambridgeshire County Council

POPULATION: 667,260 (mid-1990)

POLITICAL CONTROL: Conservative

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

Largely rural, plus major university city of Cambridge and the new town development of Greater Peterborough. Cambridgeshire is the fastest growing county in Britain.

DEPARTMENTAL BASE OF SLS: Education Service (since April, 1991)

TITLE OF DEPARTMENT HEAD: Director of Education

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Education Committee

NAME OF SLS: Schools Library Service Agency

NAME AND DESIGNATION OF HEAD OF SLS: Mrs Margaret E Smith,
Senior Advisor,
Schools Library Service Agency

SCHOOL POPULATION: 99,000

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

4 centres (at present - possible rationalisation in 2-3 years time) plus HQ office for Senior Advisor.

Now being established as a Business Unit with a trading account - funds delegated to secondary schools, 1991/92, primary (+ secondary), 1992/93, all (including special), 1993/94. New logo and letterheads. Publicity being produced, including that for new 'potential' customers, e.g. independent schools, non-LEA other institutions, non-Cambridgeshire schools, etc.

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: Lancashire County Council

POPULATION: 1.4 million

POLITICAL CONTROL: Labour

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

Lancashire has the fourth largest population of the 39 Shire counties. Stretching from Carnforth in the North to Ormskirk in the South, and Nelson and Colne in the East, the county covers an area of 1,183 square miles and has a population of 1.4 million. There is a rich diversity of landscape in Lancashire which includes 77 miles of coastline, incorporating the seaside resorts of Blackpool, Morecambe, Heysham, Fleetwood, Thornton Cleveleys and Lytham St Anne. Contrasting strongly with the well-known coastal area are the rugged and beautiful moorlands of Angelzarke, the Rossendale Hills, the Forest of Bowland and attractive rural areas such as the Ribble Valley and Lune Valley which are dotted with small villages. Lancashire also includes many important historical and industrial towns such as Lancaster, Preston, Blackburn, Burnley and Accrington, and two New Town Developments in Skelmersdale and Central Lancashire.

DEPARTMENTAL BASE OF SLS: County Library Headquarters, Preston where the Central Region operates the County Projects Service and Services to Children in the Centre and South of the County.

Great Horwood, Nr. Accrington - this is the East Region base and operates the Loan Exchange and Advisory Service to schools in the East of the County.

Thornton, Nr. Fleetwood - this is the West Region base and operates the Loans Exchange and Advisory Service to Schools in the West of the county.

TITLE OF DEPARTMENT HEAD: Assistant County Librarian, Education & Reader Services

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Library, Museums & Arts Committee

NAME OF SLS: Lancashire School Library Service

NAME AND DESIGNATION OF HEAD OF SLS: Assistant County Librarian,
Education & Reader Services

SCHOOL POPULATION: 208,000

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

There are three Regional Bases. This is a very recent restructuring and currently two mobiles operate throughout the county to provide loan and exchange services to ten of the fourteen districts. This is due to be extended to all fourteen districts within the next twelve months. A centralised project service now operates for the entire county. The service is provided on an agency basis on behalf of the Education Department who are recharged on an annual basis.

Under the latest arrangements for Local Management of Schools, the secondary school service will cease to operate under the Education Department and any services offered may be provided by the public library service on a recharged basis to individual schools. This is due to the funding for that element of the service being delegated to schools with a final phase being completed in April, 1992. The primary school funding is still centrally controlled at the request of the majority of primary schools and therefore a service will still operate on a similar basis to the agency arrangement previously described.

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: London Borough of Hillingdon

POPULATION: 234,000

POLITICAL CONTROL: Conservative

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

Hillingdon is the West London Borough situated 14 miles from Central London, bordering the counties of Surrey, Buckinghamshire and Hertfordshire and the London Boroughs of Harrow, Hounslow and Ealing. It is close to the motorway network and to Heathrow Airport. There is a mix of residential and commercial areas within the Borough, from the village of Harefield set in rural farmland and woodland, to Stockley Park in West Drayton, a business park and office area. Uxbridge is the main shopping centre and is the headquarters of the Council. The population of Hillingdon is 234,000, of which it is estimated that at least 10% are from ethnic community groups, with significant numbers from the Indian sub-continent.

DEPARTMENTAL BASE OF SLS: Cultural Activities and Libraries Unit within Education and Community Service Group

TITLE OF DEPARTMENT HEAD: Unit Manager - Community Services Manager - Group Director

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Community Services Sub Education and Community Services (full)

NAME OF SLS: Hillingdon Schools Library Service

NAME AND DESIGNATION OF HEAD OF SLS: Eileen Smyth, Schools Library Service Manager; Trisha Grimshaw, Head of Client Services

SCHOOL POPULATION: 33,200 (including nursery places)

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

Hillingdon's Library Service has undergone a complete restructuring within the last year. The Schools Library Service now comes within the Client Service group in the Cultural Activities and Libraries Unit, with the SLS team manager reporting to the Head of Client Services. The Schools Library Service is termed a designated Management Unit looking to recover a proportion of its costs.

The Service is housed in Level 6 at the Central Library, Uxbridge, from where it operates a borough-wide service. Services offered to schools include loan services, project services, professional support and advice, and an Active Learning Resources collection of religious and cultural artifacts.

Under LMS from 1 April, 1992, a proportion of the SLS costs will be delegated to LEA and Grant-Maintained schools. The Schools Library Service will retain its fixed costs centrally and schools will be invited to buy back for an initial two-year period.

There are 17 secondary schools within Hillingdon and, by 1 April 1992, 8 will be operating within G.M. status.

The Council is producing a 'Portfolio of Services' which G.M. and independent schools can buy into. The SLS will feature in the Portfolio.

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: The Royal Borough of Kensington & Chelsea

POPULATION: 135,000

POLITICAL CONTROL: Conservative

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

A small, socially diverse inner city borough (6 miles x 2 miles) with high population density in the north and south-west. An estimated 45% of children are educated in private schools. Significant numbers of pupils cross borough boundaries (both in and out) for state education. It has the highest proportion in London of residents born overseas and a very high proportion of one-person households and of single parent families. There is a very high rate of turnover of residents especially in the south-west (Earls Court). Small businesses form an important part of the economy, there is little industry, but the prosperous central part of the borough has a busy business/shopping area (Kensington High Street) which attracts tourists and other visitors.

DEPARTMENTAL BASE OF SLS: Agency service provided for Education Department by Libraries Department

TITLE OF DEPARTMENT HEAD: Director of Libraries and Arts

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Education and Libraries

NAME OF SLS: Schools Library Service

NAME AND DESIGNATION OF HEAD OF SLS: Schools Librarian (Sue Riley)

SCHOOL POPULATION: 9,322

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

Single service point situated in the Education Department's Professional Development Centre for Teachers. Provides loans of project materials (multi-media) and recreational materials, advice and promotional activities.

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: Birmingham

POPULATION: 992,000

POLITICAL CONTROL: Labour

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

Urban. Service industries; tourism; conference centre. High unemployment. High ethnic minority population. Some heavy industry left, but not much.

DEPARTMENTAL BASE OF SLS: Library Services

TITLE OF DEPARTMENT HEAD: Director of Libraries

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Leisure Services Committee

NAME OF SLS: Birmingham School Library Service

NAME AND DESIGNATION OF HEAD OF SLS: Assistant Director (Children, Youth and Education) Direct management by Principal Librarian, School and Education Support Services

SCHOOL POPULATION: 167,000 approx.

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

Book Purchase Scheme; Advisory Services; Loan Services (in the process of being centralised). Training responsibilities for SIMS Library Management package and Helpline. Advisory Teacher on school libraries/information skills - 3 year project via ESG grant.

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: Bradford M.D.C.

POPULATION: 467,700

POLITICAL CONTROL: Labour

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

Industrial conurbation broken up by green belts following the contours and becoming rural in west and north. Wool is no longer the main industry. It is now third after service and engineering industries. Unemployment about 2-3% above national average but very high (50-60%) in some areas of the city.

DEPARTMENTAL BASE OF SLS: School & College Support Service of the Directorate of Education

TITLE OF DEPARTMENT HEAD: Principal Education Officer (School & College Support)

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Schools Sub-Committee of Education Committee

NAME OF SLS: Education Library Service

NAME AND DESIGNATION OF HEAD OF SLS: Bob Wilkes, Principal Education Librarian

SCHOOL POPULATION: 81,745

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

2 bases - Bradford and Keighley. Main feature is that teachers come to choose their projects and loan collections. Not packaged services.

3 posts for librarians to promote books to pupils. 21,000 pupils received book talks in academic year 1990/91.

SUPPORTS TO LEARNING PROJECT

Profiles of case-studied authorities

NAME OF AUTHORITY: West Glamorgan

POPULATION: 363,000

POLITICAL CONTROL: Labour

MAIN CHARACTERISTICS: (e.g. rural/urban; main industries/employment)

Mainly urban, with 3 main commercial centres: Swansea; Neath; Port Talbot. However, the Gower peninsular to the west of the county is rural and has a developing tourist trade. Parts of the Neath and Afan valleys retain a Welsh-speaking tradition and there is a growth in Welsh learners. The previous coal and steel industries have declined, creating severe unemployment in some areas.

DEPARTMENTAL BASE OF SLS: Library Department

TITLE OF DEPARTMENT HEAD: County Librarian

COMMITTEE TO WHICH THE DEPARTMENT REPORTS: Quality Assurance (under review)

NAME OF SLS: Education Library & Resource Service

NAME AND DESIGNATION OF HEAD OF SLS: Assistant County Librarian (Work with Young People)

SCHOOL POPULATION: 61,075 (January, 1991)

MAIN CHARACTERISTICS: (e.g. number of bases; special features)

Operates from one base situated in the Afan area of the county. Stock contains wide range of formats including museum collection and framed print collection. Centre also provides a Reprographic and Audio Visual service to schools and is the base for Children's Services. Can provide INSET facilities and conference space. Operates a project delivery service.

APPENDIX G

OUTLINE OF STRUCTURED INTERVIEWS, 1991

OUTLINE OF STRUCTURED INTERVIEWS, 1991

1. HEADS OF SLS IN CONTACT AUTHORITIES

Purpose

To gather information on changes since the previous visit; to investigate the management of change; to test the study's hypotheses.

Coverage

a) Changes since 1990

- | | | |
|----------------------------|---|--|
| Structures | - | Authority; Department; SLS.
Including both departmental and
committee structures. |
| Policies | - | Authority; Department; SLS.
Including political control and
local culture. |
| Service range and
level | - | Service changes for SLS consequent
on ERA; budget changes for
authority, department, SLS. |
| Relationships | - | Relationship of SLS with Education
and Library Departments; Public
Library services to children;
Schools. |

b) Management of change

The sources of change; the processes through which decisions are made; the processes through which change is implemented and monitored.

Specific questions included:

- How far does SLS change reflect a change taking place in the whole authority?
- How far were decisions on SLS change post-ERA affected by the culture of the parent department?
- How far is SLS change affecting the culture of the parent department?
- Given the range of options available, why were specific choices made?
- What internal factors will assist the process of SLS change?

- Is there a tension between professional values and the commercial role being required increasingly of SLS?

c) Hypotheses

- ERA, although national legislation, is not having a uniform effect on SLS, but is being mediated by local cultures.
- Certain common factors guide the management of a proactive response to ERA, even though structures and services may differ.
- ERA is leading to new perceptions and measures of SLS effectiveness.

2. CHIEF LIBRARIANS OR ASSISTANT DIRECTORS OF EDUCATION

Purpose

To gather information on changes since 1990; to investigate the local context of SLS change; to test the study's hypotheses.

a) Changes since 1990

- | | | |
|-------------------------|---|---|
| Structures | - | Authority; Department; Use of consultants. |
| Policies | - | Authority; Department; SLS. Political control. |
| Service range and level | - | Authority; Department. State of budget; local developments. |
| Relationships | - | Relationship of SLS with Education and Library Departments; Public library services to children; Schools. |

b) Management of change

As in Section 1 b), with emphasis on strategic management and marketing.

c) Hypotheses

As in Section 1 c).

APPENDIX H

POLICY STATEMENTS PRE-APRIL 1990

POLICY STATEMENTS PRE-APRIL 1990

Kensington & Chelsea (Extract)

5.3 Purpose and Objectives of School Library Service

- . to provide a comprehensive range of books and learning materials to support the school library resource centres in meeting the needs of the curriculum;
- . to provide creative and recreational materials to encourage pupils in all phases of their reading so they obtain enjoyment and development (sic) critical appreciation and judgement skills;
- . to provide professional guidance and advice to school librarians, teachers and pupils in the use of library services;
- . to provide information, advice and encouragement on books and reading to children, teachers and parents;
- . to co-ordinate the effective and efficient use and development of school library resources to the best advantage of the Council;
- . to promote and foster a love of literature amongst pupils.

Nottinghamshire

(Key tasks appended to each objective have been omitted)

Education Library Service

Aim of Service

To support the policies and objectives of the Local Education Authority by providing a professional support service to education officers, inspectors, headteachers, principals, teaching staff and students*. This service to be delivered through the provision of high quality resources and a comprehensive advisory service on all library and resource related matters.

- * Throughout this document the term 'student' is used to refer to all children of school age as well as young people in further education.

OBJECTIVE 1

To advise the Chief Education Officer and other Education Department staff on all matters relating to the effective management, development, organisation and use of resources in schools, colleges and other educational establishments.

OBJECTIVE 2

To enable teaching staff and students to have access to a wide range of professionally selected resources which are relevant to their curriculum requirements and which take particular account of cultural diversity and the language and special needs of groups and individuals.

OBJECTIVE 3

To provide a current awareness service to enable teaching and other professional staff to keep themselves up to date with current trends and developments in education.

OBJECTIVE 4

To provide a co-ordinating, advisory and training function in support of library staff working in schools and colleges to ensure an optimum level of service across the county.

OBJECTIVE 5

To enable schools and colleges to exploit the implications of new technology in the field of information handling.

OBJECTIVE 6

To maintain effective liaison with the Public Library Service and relevant external agencies to ensure that educational users have access to a comprehensive information and resource service on both a local and national basis.

SUFFOLK SCHOOL LIBRARY SERVICE

Aims

To promote, support and contribute to the education authority's curriculum policies, especially in matters concerning the use and provision of learning resources, through the policies already approved.

To support each educational establishment in Suffolk in delivering the authority's curriculum policy; by providing appropriate resources.

To support, promote and evaluate the provision in each educational establishment, of effective library resource provision.

To promote and support reading for enjoyment literacy and information skills amongst students of all ages and abilities.

Objectives

To establish guidelines for resource provision in primary and secondary schools, and to work towards the full implementation of the guidelines in all schools.

To acquire, maintain and develop attractive, relevant and wide-ranging learning resources in each area schools library service, mobile and school.

To develop, support and promote the training of all individuals involved in the management and use of learning resources through the provision of programmes of relevant INSET.

To respond promptly and adequately to requests for learning resources.

To provide a regular service of information, advice, practical help and initiatives in the field of learning resource provision.

To develop and maintain awareness of innovations in Information Technology for education.

To develop and maintain effective liaison with all officers, advisers, and institutions of the education authority and the library service, especially in all matters relating to the provision and use of libraries and learning resources.

APPENDIX J

POLICY STATEMENTS POST-APRIL 1990

3. Education Library Service

Content: The LEA has recognised the value of libraries in schools. The ELS co-ordinates these resources and stimulates development. The LEA's policy on the Monitoring and Evaluation of schools requires inputs on specialist areas of school operations and ELS contributes on all aspects of the work of Learning Centres.

Aim: To support the curriculum, in schools and colleges, by providing a centralised loan collection of materials and to advise about books and the effective management of school and other libraries.

Objectives:

1. To ensure the availability of books and other learning materials to support teachers in delivering the curriculum.
2. To advise, and support schools, colleges and others on all aspects of the use of libraries.
3. To contribute specialist expertise to the work of other MU's.

Tasks/Functions:

1. To provide a loan collection of books to enhance the range of reading offered by school libraries. (ob: 1)
2. To offer advice on the management of libraries. (ob: 2)
3. To participate in the monitoring and evaluation of schools particularly the performance of school libraries. (ob: 3)
4. To organise a Book Purchase Scheme for the effective spending of schools' money. (ob: 1)
5. To advise on the school library as incorporated in new building plans and the refurbishment of existing school libraries. (ob: 3)
6. To produce guidelines on Education Library Policy. (obs: 2 & 3)

Resources: Based on existing service.

Hampshire School Library Service

OUR AIM

**SUPPORTING, ENCOURAGING AND
ENABLING SCHOOLS TO DEVELOP
THEIR LIBRARY RESOURCES TO MEET
THE LEARNING NEEDS OF THE
INDIVIDUAL**

OBJECTIVES

- ◆ develop a marketing strategy
- ◆ raise the profile of the Service
- ◆ respond to the educational policy of the Local Authority
- ◆ maintain and develop the service and the expertise within it
- ◆ evaluate and monitor the Service

APPENDIX K

KEY STAGE 3 EVALUATION: CAMBRIDGESHIRE BRIEFING NOTES

NATIONAL CURRICULUM CORE SUBJECTS AND TECHNOLOGY

KEY STAGE 3

Evaluation of Progress in Cambridgeshire Schools through the Three Foci of:

Management expectation within schools.
Teacher understanding and implementation.
Pupil experience and achievement.

All the Key Stages of the National Curriculum, for all subject areas so far reported, include many references to extended use and understanding of a wider range of learning resources, by pupils and teachers.

The following sets of questions or pointers, for each of the 3 foci, are, necessarily, slightly different. They may be helpful to Inspectors when carrying out the forthcoming evaluation of Key Stage 3 in Cambridgeshire schools.

The Key Stage 3 details, including programmes of study for the 4 subject areas of English, Maths, Science and Technology include a total of 117 references to extended use and understanding of a wider range of types of learning resources.

MANAGEMENT EXPECTATION

- A Extended use and understanding of a wider range of types of learning resources.
 - B Development of information retrieval skills - how to extract, analyse and present information obtained from resources.
-

1. Are Senior Management aware of the requirement for an extended range of learning resources?
2. Has an analysis of present levels of learning resources - their age, appropriateness and quantity - been carried out? Either by teaching staff, or by the Schools Library Service for the school?
3. Does Senior Management have a whole school policy or approach (negotiated with staff) for learning resource provision and management of information handling skills? - if so, is this based on the guidelines in "Learning Resource Provision in Secondary Schools - Guidelines for Good Practice", Cambridgeshire Education Service November 1988.
4. Do the School and Staff Development Plans reflect development of effective learning resource provision across the curriculum, including development of a learning resource centre?
5. Does any individual Senior Manager have direct responsibility for development of effective learning resource provision across the curriculum?
6. Are Senior Management discussing changes in teaching and learning styles to more effectively meet the needs of teaching staff and pupils?
7. Do the teaching staff and pupils feel confident that their school's Senior Management is committed to developing effective learning resource provision?
8. If the school has appointed a professional librarian to their staff (Ken Stimpson, Longsands, Hinchbrook, Impington) or is proposing to do so (Swavesey), what role does Senior Management consider the professional librarian to have in the development of effective learning resources across the curriculum?
9. If a school does not consider the appointment of a professional librarian vital, what particular reasons have caused this decision?
10. What role does Senior Management consider the teacher-librarian to have in the development of effective learning resources across the curriculum?

TEACHER UNDERSTANDING AND IMPLEMENTATION

- A Extended use and understanding of a wider range of types of learning resources.
- B Development of information retrieval skills - how to extract, analyse and present information obtained from resources.
-

1. Do you as a teacher provide guidance and assistance to pupils in the planning of their assignments?
2. Do you involve the librarian/teacher-librarian in this planning process?
3. Are you aware of the range of learning resources available to you and your pupils?
 - a) in the school library;
 - b) in your department and other departments;
 - c) outside of the school.
4. Do you feel confident to assess the suitability/appropriateness of various types of learning resources for specific requirements?
 - books and other text materials including newspapers and journals;
 - videos;
 - audio cassettes;
 - wallcharts;
 - slide sets;
 - databases and other computer software
5. Do you know how to use your school library and other sources of learning resources and information in and outside of your school?
6. Do you provide guidance to pupils in the various methods of recording information?:- e.g.:
 - note-taking from text resources;
 - note-taking from visual and audio resources;
 - use of databases.
7. Do you provide guidance to pupils in the recognition of bias and comparative opinions in comparative sources of information?

Do you understand for yourself how to detect bias in text or other types of information?

PUPIL EXPERIENCE AND ACHIEVEMENT

- A Extended use of, and understanding of, a wider range of types of learning resources.
 - B Development of information retrieval skills - how to extract, analyse and present information obtained from resources.
-

1. Are pupils given guidance and support by teachers and/or librarians in the planning of their assignments?

Sub-question - What type of planning?

2. Are pupils given guidance by teachers and/or librarians about how to select appropriate learning resources for themselves?

Sub-question - are pupils given clear guidance in how to use the school library, and other sources of information provision?

3. Are pupils made aware of the various types of learning resources? - books, other print format including newspapers and journals, videos, audio cassettes, slides, wallcharts, computer software including databases.

4. Are pupils encouraged to read, watch, listen and investigate all types of learning resources for themselves, but with guidance and support?

5. Are pupils confident in their use of all types of learning resource and all sources of resources - inside and outside of the school? - including:

- discussion with and questioning of peers and adults;
- selecting and using appropriate text and non-text resources.

6. Are pupils given understanding of, and help in using the various methods of recording information? - e.g.:-

- note-taking from text resources;
- note-taking from visual and audio resources;
- use of databases.

7. Are pupils given understanding of bias in resources?

Are they given guidance in recognition of bias and how to balance various opinions being expressed?

8. Do pupils realise, from guidance, that they can and should discard inappropriate resources after selection, and not overload themselves with too many sources of information?

This process should include comparison of various types of resources for their appropriateness to the particular assignment or task.