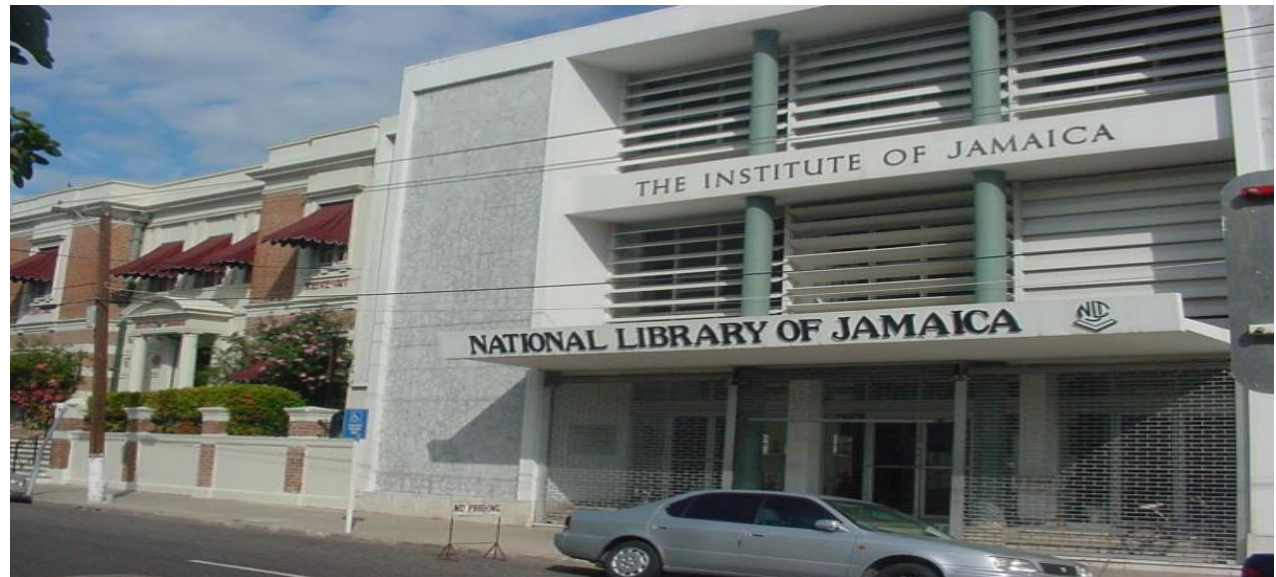


# DEVELOPING AND MAINTAINING E-RESOURCES: POLICIES AND PROCEDURES FOR LIBRARIES



# PART ONE



# WRITING POLICY

## WHY DO WE NEED POLICIES?

- To provide a framework for action which will assist persons in doing the job they need to do.
- To prevent the need to reinvent the wheel.
- To promote efficiency
- To meet a variety of organisational requirements
  - Legal
  - Funding agreements



# WHAT IS THE SCOPE OF THE POLICY?

**How detailed do you want it to be?**



# CRITERIA

- Will it be useful?
  - For colleges and universities, does the policy include issues relevant to accreditation?
  - Are the legislative requirements being met where necessary?
  - Will it lead to improvement in the quality of service being offered?



# WRITING THE POLICY

**Important:**

**ENSURE THAT THE POLICY  
IS TAILORED TO THE  
SPECIFIC NEEDS OF YOUR  
ORGANIZATION OR  
DEPARTMENT**



# WRITING THE POLICY

## KEEP IT SIMPLE

**State the principles underpinning the policy.**



# WHY DIGITIZE?

- 1. To advance the vision and mission of the National Library**
  - To foster and promote the nation's knowledge of its history, heritage and information sources (Vision Statement)
  - To collect, preserve, document and facilitate access to the nation's cultural heritage (Mission Statement)





# WHY DIGITIZE?

## 2. To preserve rare and fragile resources.

- What constitutes fragile?
  - Pages falling apart
  - Brittle material
  - Browning/ foxing of material
  - In the case of film – the effects of advanced vinegar syndrome



# WHY DIGITIZE?

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on the 30th of November, 1693; and upon this occasion he reviewed the publication of the Philosophical Transactions, which had been omitted for some time. He continued to be the editor of this work till the year 1712; and the volumes which appeared during that period are monuments of his industry and ingenuity, many of the pieces contained in them being written by himself.

In the mean time he published *Catalogus plantarum quæ in Insula Jamaica sponte proveniunt, &c. Seu Prodromi Historia Naturalis pars prima*, which he dedicated to the Royal Society and College of Physicians. About the same time he formed the plan of a dispensary, where the poor might be furnished at prime cost with such medicines as their several maladies might require, which he afterwards carried into execution, with the assistance of the President and other members of the College of Physicians.

Our author's thirst for natural knowledge seems to have been born with him, so that his cabinet of curiosities may be said to have commenced with his being. He was continually enriching and enlarging it, and the fame which, in the course of a few years, it had acquired, brought every thing that was curious in art or nature to be first offered to him for purchase. These acquisitions, however, increased it but very slowly in comparison of the augmentation it received in 1701 by the death of William Courten, Esq. a gentleman who had employed all his time, and the greater part of his fortune, in collecting rarities, and who bequeathed the whole to Dr. Sloane, on condition of his paying certain debts and legacies with which he had charged it. These terms our author accepted, and he executed the will of the donor with the most scrupulous exactness; on which account some people have said, that he purchased Mr. Courten's curiosities at a dear rate.

In 1707 the first volume of Dr. Sloane's Natural History of Jamaica appeared in folio, though the publication of the second was delayed till 1725. By this very useful as well as magnificent work the *Materia Medica* was enriched with a great number of excellent drugs not before known. In 1708 the Doctor was elected a foreign member of the Royal Academy of sciences at Paris, in the room of Mr. Tschirnaus; an honour so much the greater, as we were then at war with France, and the Queen's express consent was necessary before he could accept it. In proportion as his credit rose among the learned, his practice increased among the people of rank. Queen Anne herself frequently consulted him, and in her last illness was bled by him.

On the advancement of George I. to the throne, that Prince, on the 24 of April 1716, created the Doctor a Baronet, an hereditary title of honour to which no English physician had before attained; and at the same time made him Physician General to the army, in  
which

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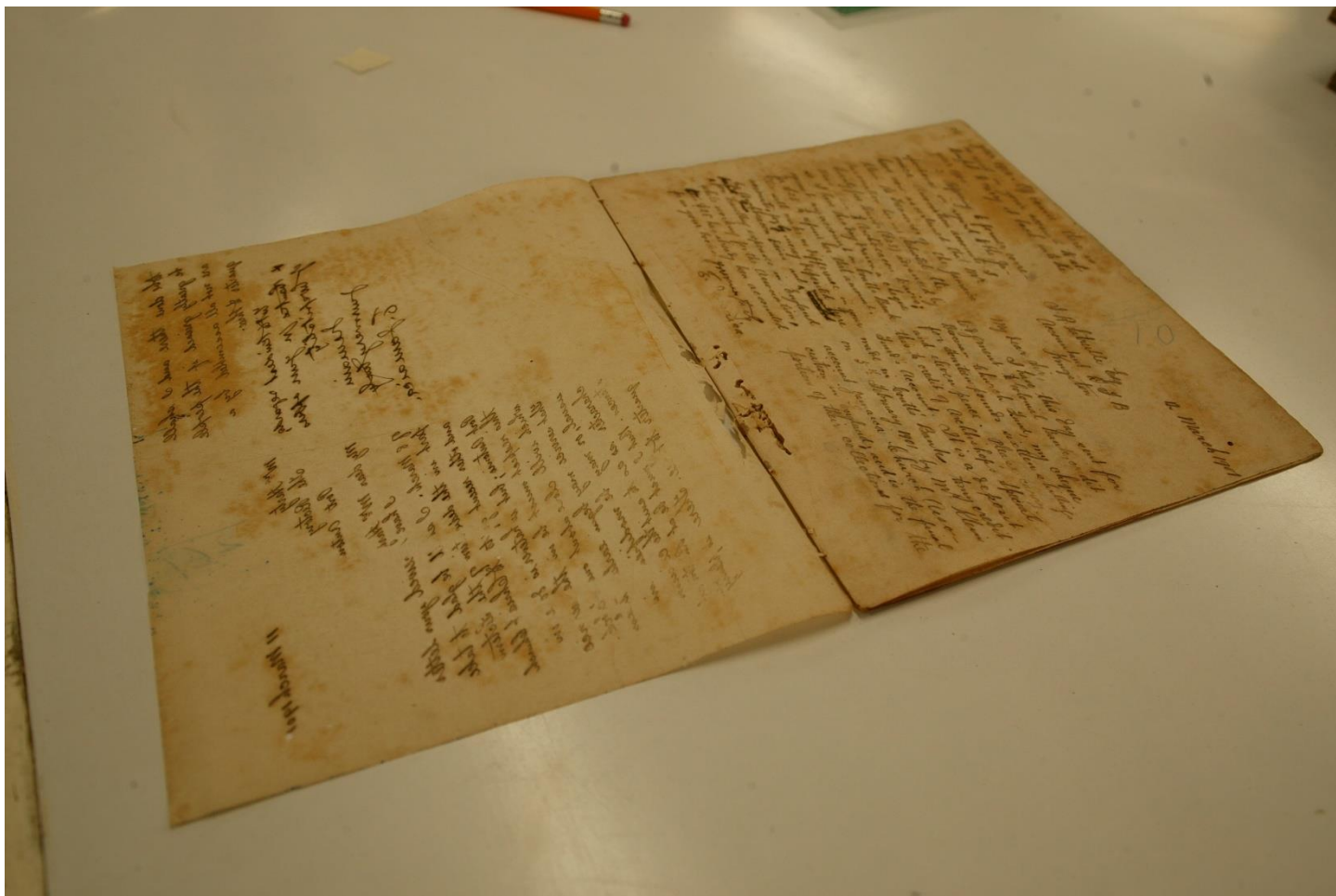
which station he continued till 1727, when he was appointed Physician in Ordinary to Geo. II. He attended the Royal Family till his death; and was particularly favoured by Queen Caroline, who placed the greatest confidence in his prescription. In the mean time he had been unanimously chosen one of the elects of the College of Physicians, June 1, 1716, and he was elected President of the same body on September 30, 1719, an office which he held for sixteen years. During that period he not only gave the highest proofs of his zeal and assiduity in the discharge of his duty, but in 1721 made a present to that society of 1000. and so far remitted a very considerable debt, which the corporation owed him, as to accept it in such small sums as were least inconvenient to the state of their affairs. Sir Hans was no less liberal to other learned bodies. He had no sooner purchased the Manor of Chelsea, than he gave the company of Apothecaries the entire freehold of their botanical garden there, upon condition only that they should present yearly to the Royal Society fifty new plants, till the number should amount to 2000.

He gave besides several other considerable donations for the improvement of this garden; the situation of which, on the banks of the Thames, and in the neighbourhood of the capital, was such as to render it useful in two respects. First, by producing the most rare and medicinal plants; and, secondly, by serving as an excellent school for young botanists; an advantage which he himself had derived from it in the early part of his life.

The death of Sir Isaac Newton, which happened in 1727, made way for the advancement of Sir Hans to the Presidency of the Royal society. He had been Vice President, and frequently sat in the chair for that great man, and by his long connection with this learned body he had contracted so strong an affection for it, that he made them a present of an hundred guineas, caused a curious bust of King Charles II. its founder, to be erected in the great hall where it met, and, as is said, was very instrumental in procuring Sir Godfrey Copley's benefaction of a medal of the value of 5 guineas, to be annually given as an honorary mark of distinction to the person communicating the best experiments to the society.

On his being raised to the chair, Sir Hans laid aside all thoughts of further promotion, and applied himself wholly to the faithful discharge of the duties of the office which he enjoyed. In this laudable occupation he employed his time from 1727 to 1740, when, at the age of fourscore, he formed a resolution of quitting the service of the public, and living for himself. With this view he resigned the Presidency of the Royal Society much against the inclination of that respectable body, who chose Martin Folkes,  
Esq.

# WHY DIGITIZE?



# WHY DIGITIZE?



# WHY DIGITIZE?

## 3. To facilitate access to a wider user community

- **The print disabled** (a person who cannot effectively read print because of a visual, physical, perceptual, developmental, cognitive, or learning disability)
- **Youth** (Access to the NLJ's collection is limited to persons 14 yrs and over)



## WHY DIGITIZE?

**4. To develop best practices relating to digitization for adaptation by the JAMLIN (Jamaica Libraries and Information Network)**



## WHY DIGITIZE?

### 5. **To create new collections**

Through NLJDigital, the National Library has created several new collections which showcase the diversity of the content available



### *Introduction*

The National Library of Jamaica's (NLJ) holdings constitute the most comprehensive collection of Jamaican documentary offering an invaluable representation of Jamaica's history and heritage. To enhance access to its rich and varied collections, the National NLJ has digitized thousands of historical photographs, prints, drawings, pamphlets, programmes, manuscripts, books, rare maps and other rare and unique materials. The vast majority of these images is freely available online for public access and has been grouped into the following categories:



#### **Jamaican Biographies**

These online biographical notes highlight noteworthy Jamaican and Caribbean people. It encompasses a brief overview of the person and digitized newspaper clippings, programmes, pamphlets and other miscellaneous documents contained in the vertical files at the National Library of Jamaica. Other personalities who have significant influence on Jamaica are also highlighted. [[See more](#)]



#### **Digital Images Collection**

This is a catalogue of digitized images from the photograph collection of the National Library of Jamaica. This database provides greater access to Jamaica's rich heritage through the image collection. [[See more](#)]



#### **Picture Dis**

Picture Dis is a collection of images highlighting people, places, and products of Jamaica. It is hosted on Flickr. [[See more](#)]



# HOW DO WE DECIDE ON WHAT GETS DIGITIZED?

**At the National Library the order of priority is as follows:**

- ❑ Preservation of fragile resources
  - ❑ Physical condition
  - ❑ To satisfy request for material in poor physical condition
- ❑ Uniqueness and/or rarity of material
  - ❑ the value added to relatively unknown material
  - ❑ the potential for advancing scholarship
  - ❑ historical and/or cultural significance of material



# WHAT DO WE DIGITIZE?

## EVERYTHING

- Books
- Newspaper Clippings
- Pamphlets
- Journals
- Manuscripts
- Programmes
- Postcards
- Maps and Prints
- Photographs
- Newspapers
- Microfilms
- Moving Images (Films)
- Sound Recordings



# WRITING THE POLICY

**Ensure that draft policies include a draft number and date.**

**Include who authorised the policy and when.**

**Ensure that somebody in the organization is responsible for keeping 'control copies' of policies.**

- Intranet
- Hard copy
- Both



**IMPLEMENT THE POLICY!!!**



# IMPLEMENTATION

- How are you going to engage existing staff in the implementation of the policy?
  - Think about developing the knowledge needed and skills required to drive implementation
    - Training
    - Periodic meetings
    - Memos
  - Ensure that staff feels free to ask questions, suggest ideas, particularly where implementation may create unforeseen difficulties.
- What about new staff?
  - Are you going to have to reexamine/change your existing orientation programme?



# IMPLEMENTATION

- Will you need to develop aids such as brochures, poster, etc., to help in understanding the new policy?
- Ensure that the implementation of policies is constantly and closely monitored by both management AND staff.
  - Self-reporting by staff
  - Inspection by management
  - Independent audit



# IMPLEMENTATION

## **REVIEW. REVIEW. REVIEW.**

It is good practice to review your policy at least every two or three years.

### WHY?

- Laws change
- Technology develops



# PART TWO





# WRITING A PROCEDURAL MANUAL

- **What procedures are you going to document?**
  - Talk to the potential users of the manual
    - What tasks need clarification
    - Is more information needed?
  - Make a list of operational problems you could solve with clearly defined procedures



# WRITING A PROCEDURAL MANUAL

## ◦ Do your research.

- Best resource? The persons doing the task.
  - Watch the person perform the task
  - Take notes
    - Ask the person to write down steps involved
  - Pay close attention to any tips or warning an experienced person will tell you



# WRITING A PROCEDURAL MANUAL

## ○ Structure of the manual

- How do you want it to look?
  - Clear and easy to read
  - Title each page with the procedure's name
    - Note how frequently is performed and document it
    - Document the tips and warning received as it relates to the procedure
  - Document the procedure in a two column table
    - Left column > Person responsible for the procedure
    - Right column > List in order the steps that the individual performs



# WRITING A PROCEDURAL MANUAL

- Structure of the manual

**If there are several persons involved in the procedure, each person should be able to clearly identify their role and where they fall in the process.**



# WRITING THE PROCEDURAL MANUAL

## TEST. TEST. TEST. TEST.

- Get a person unfamiliar with the procedure to follow the steps

### WHY?

An inexperienced person won't take shortcuts to overcome a potential difficulty

If an inexperienced person can follow the instructions reasonably well, the manual works



# WRITING THE PROCEDURAL MANUAL

## REVISE. REVISE. REVISE

- Clarify
- Add
- Delete
- Rearrange steps

**Until the procedures can be  
followed by ANYONE  
reading the manual**



# WRITING THE PROCEDURAL MANUAL

## PUBLISH

- Include a table of contents
- Add a glossary of terms (if necessary) which may be specific/unique to your organization or department.

