

**Joint use higher education libraries: factors which contribute  
to, or challenge, their successful operation**

Submitted by

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## Contents

Abstract.....	2
Introduction.....	3
Literature review .....	8
Benefits.....	8
Challenges.....	10
Critical Success Factors .....	13
Space and location.....	13
Seamless service provision .....	14
Committed and adaptable staff .....	14
Single line management.....	15
Clear written agreements.....	16
Plan for evaluation.....	16
Possible factors influencing higher education libraries.....	18
Current policies that impact on libraries in each sector .....	18
Institutional culture .....	20
Information literacy .....	21
Conclusion .....	22
Methodology .....	23
Research Design .....	23
Selection of participants .....	24
Data collection .....	25
Trustworthiness .....	26
Data analysis and reporting .....	28
Discussion of results.....	30
The participants .....	30
The libraries .....	31
Reasons for joining .....	32
Clear written agreements .....	34
Seamless service provision.....	35
Committed and flexible staff.....	37
Manager characteristics.....	39
Space and location .....	41
Institutional culture .....	42
Summary and recommendations for future research .....	45
Key factors .....	47
Recommendations for further study .....	48
Appendix A: Interview Schedule .....	49
References.....	50

## **Abstract**

In this thesis, the factors which contribute to, or challenge, the successful operation of a joint use library, involving a university and a TAFE, are investigated. Two managers of existing joint use university/TAFE libraries in Australia were interviewed to capture their perceptions of the key factors. In agreement with the current literature, the managers identified the quality and commitment of staff, as well as the quality of the written agreement, as major contributors to successful operations. Other factors, which the managers identified as significant, were having adequate funding from all partners involved, managing diverse client expectations and good communication between all key players.

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I dedicate this work to my father, Tony Kendrick, who at 18 presented me with a dictionary so that I would “never be stuck for words”.

## **Statement of Authorship**

Except where reference is made in the text of the thesis, this thesis contains no material published elsewhere or extracted in whole or part from a thesis by which I have qualified for or been awarded another degree or diploma.

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All research procedures reported in this thesis were approved by the relevant Ethics Committee (Approval No: R066/10)

## Introduction

A joint use library is one where two or more different institutions share the one library service, under some form of shared governance. It is acknowledged in the literature that this kind of shared arrangement, involving more than one institution, is one of the most challenging (Bundy, 2007a) and requires library managers to have skills in compromise and collaboration (McNichol, 2008) if the joint use arrangement is to succeed. As a manager of an existing joint use library, which involves a university and an institute of Technical and Further Education (TAFE), I wanted to canvas the views of other library managers, in a similar situation, to determine what they identified as the factors which contribute to, or challenge, the successful operation of a joint use university/TAFE library. I could then use this information to reflect on, and improve, my own practices.

Joint use arrangements can occur between many kinds of libraries but are usually found in Australia between public (city) libraries and school libraries. Joint use libraries are found most commonly in rural areas, where the pooling of resources to create one larger library is seen as more sustainable than establishing and maintaining two small libraries. There are however some notable examples of large joint use libraries in bigger centres. These libraries, such as the Martin Luther King Jnr Library in San Jose, California, and the Rockingham Community Library in Western Australia are hailed (Bundy, 2007a, 2007b; Kauppila & Russell, 2003) as fine examples of cooperative partnerships, that result in enhanced services and resources for their diverse client base.

Although joint use libraries exist between city and school, school and further education, city and university and in partnership with special libraries, there are relatively few examples in Australia of joint use libraries shared between a university and a Technical and Further Education (TAFE) institution. Of the 130 Australian joint use libraries identified by the leading researcher in this area, Dr. Alan Bundy, in his recent submission to the Victorian Competition and Efficiency Commission (Bundy, 2009a) only about 8% include a TAFE and university partner. I found this surprising given that university and TAFE libraries share a common goal in supporting post secondary education and there is considerable encouragement from government for the two sectors to work more closely together (Bradley, Noonan, Nugent, & Scales, 2008).

The factors which contribute to, or challenge, the successful operation of a joint use higher education library is of particular interest to me as a researcher, as I currently manage a joint

use library that serves the staff and students of a rural campus of a metropolitan based university and a local TAFE. Such sharing arrangements are unique to each library and are made on an institute by institute basis. The joint use arrangement operating in my library has been in place since 1991 and is governed, very broadly, by a Memorandum of Understanding (MOU) (La Trobe University Library & Wodonga Institute of TAFE, 2003). In two pages, the MOU outlines that the university and TAFE will be responsible for the purchase of their own library materials and staffing but will otherwise “jointly, develop and administer the David Mann Library, and provide resources and services which meet the needs of staff and students of the two institutions” (p. 1). A seamless service is provided to the staff and students, with all collections being listed on the one web-based catalogue and interfiled on the library shelves, all clients subject to the same rules and regulations and served equally by all library staff, regardless of institutional affiliation. All clients have access to the same resources and services offered by the Library, although with the university adopting a preference for electronic resources, which are limited to institutional users only, this sharing of resources is becoming more restricted.

When the joint use library was established, the university library formed a small part of the TAFE library on the TAFE campus. Over the subsequent 20 years, the university library has had increasing influence as the joint library uses the university’s library management system, its furniture and equipment, is supported by its infrastructure and abides by its policies and procedures. The advantage is that all clients of this joint use library have access to extensive collections, sophisticated technological infrastructure and benefit from the innovation that being linked to a large metropolitan library can generate. One disadvantage is that as the library has become more closely aligned to the university library, it may have lost some of the freedom to respond to the needs of its TAFE clients.

In 2003, the library was relocated to a purpose built library on the university campus, a move which excited the university clients but removed the physical library further away from its TAFE clients. In 2010, as an outcome of the University Library’s functional review, the ordering and processing functions of the library were centralised to the main metropolitan library, 300km away. The TAFE librarian would have preferred to keep the ordering and processing of TAFE collections locally, but this was not possible while the joint use operations are so intertwined. While the full impact of this change has not yet been felt, it highlights the strain which joint use libraries can experience when the needs of one partner is felt to compromise the needs of the other. This library is now at a crossroads, where both the TAFE and university library must decide whether the benefits of a joint use library outweigh the

compromises necessary. Most recently, a broad MOU between the University and TAFE has been developed, which will replace the existing agreement between the university library and the TAFE. This higher level agreement outlines the areas in which the two institutions will work cooperatively and will include a detailed activity schedule, which provides the written agreement for the joint use library. This research will help me to identify the factors which challenge, or contribute to, the successful operation of a joint use library so that I may include clauses in the new activity schedule to optimise the effectiveness of the shared arrangement and consider these more carefully in the day to day operations of the library.

As a first step, I have undertaken a scan of the literature that has emerged in the past decade on joint use libraries. I wanted to focus specifically on joint use libraries involving a TAFE and a university, but quickly realised that there is little in the recorded literature on this particular combination and therefore focused the literature review on joint use libraries involving a university partner. I discovered general agreement on the benefits which may be gained from combining a library service (Bundy, 2006; Haycock, 2006; McNichol, 2008), including greater resources and buildings; more abundant and qualified staffing; savings on operating costs and social benefits in terms of a more diverse client base; sharing of expertise; and easier transition between informal and formal learning.

The literature review also revealed some key stress points or challenges. Problems appear to arise when two separate library management systems are maintained so that clients have to navigate two systems; when there is constant debate over levels of financial contribution; where staff maintain separate loyalties rather than committing to the joint use library; where there are blurred lines of responsibility within the library; where there is lack of support from institutional administrators; and where there is competition for control rather than a willingness to compromise. Even if all these elements are in balance, the leading researchers on joint use libraries (Bundy, 2009b and McNichol, 2008) argue that a joint use library is desirable only, as the professional body for libraries in Australia, the Australian Library and Information Association (ALIA), stipulates "if they equal or better the level of service which would be given in separate facilities" (ALIA, 2002). Thus the joint use library must be actively looking for ways to value-add to the experience of its clients, rather than merely compensate for having to share one library.

Considering what the literature reveals about the benefits of joint use libraries, I began to wonder why there are so few joint use university /TAFE libraries in Australia. The recent *Review of Higher Education* (Bradley, et al., 2008) encourages collaboration between the

universities and TAFEs and forecasts a future environment of reduced spending on higher education (Birrell & Edwards, 2009). One area of their service provision, which would appear suitable to share, would be their libraries. Traditionally university and TAFE libraries have required substantial infrastructure costs to set up, significant recurrent costs to maintain and develop a collection and growing salary costs to open for extended hours. Sharing of these expenses for the ultimate good of both organisations would therefore seem desirable.

Perhaps there are specific challenges faced by joining two post-secondary education libraries which account for their relative scarcity? I decided to interview the managers of existing joint use university/TAFE libraries to explore their perceptions of the factors which contribute to, or challenge, the successful operation of their joint use library.

I began by contacting all university librarians in Australia and asking whether their university offered a shared library service with any TAFE. What emerged were many kinds of partnership arrangements with TAFE libraries. These arrangements included depositing a small collection of university books or computers in TAFE libraries for university students to access; entering into a service agreement for the TAFE library to deliver a certain level of service to university students studying by distance; entering into reciprocal borrowing agreements where one group of clients can borrow books from each-other's libraries; and a relatively few joint use libraries, where the library exists to serve the students of more than one institution. There are also five dual sector libraries in Australia; Swinburne, Victoria University, RMIT and University of Ballarat in Victoria; and Charles Darwin University in the Northern Territory. Their libraries serve both university and TAFE clients because the institution enrolls students from both sectors. Although these libraries share the challenge of "meeting the needs of two ostensibly different communities of users" (Haycock, 2006, p.488), they do not face the difficulty of balancing the needs of two diverse organisations, each with their own mission and strategic priorities.

For this research, eight joint use university/TAFE libraries were identified, excluding those operated by my own institution. From those eight libraries, two sites were selected using convenience sampling. The managers at those two sites were interviewed in February 2011, via telephone, and asked a series of open ended questions on their perceptions of the benefits and challenges of working in a joint use library. The participants identified quality and commitment of staff and quality of the written agreement as major contributors to the successful operation of a joint use library. Other factors which these participants emphasised as important in ensuring the successful operation of a joint use library were

managing client expectation, having adequate funding from all partners involved and good communication between key players.

The information gathered in these interviews is presented in this thesis as a descriptive narrative about the perceptions of two managers, with considerable experience working in a joint use library. In this thesis, I examine the literature which has emerged in the past decade on joint use libraries, which involve a university partner, and explain how my research was conducted and why this methodology was selected. I discuss the results of the interviews conducted under the identified themes of clear written agreements; seamless service provision; committed and flexible staff; manager characteristics; space and location; and institutional culture. I then examine how the factors identified by the participants in this study differ from those identified in the literature and comment on how I can use this information to inform my own practice. Acknowledging the limitations of a study of such small scale, I make some recommendations for further research. These recommendations include interviewing additional managers to increase the size of the sample; investigating the desirable characteristics for staff working in joint use libraries and how these qualities can be developed; and exploring how partnership principles can be articulated in written agreements.

## Literature review

In this literature review, I examine the benefits and challenges of operating a joint use library where one partner is a university library, and identify the commonly agreed critical success factors. This is followed by an exploration of the issues that may particularly influence a joint use higher education library, including government policies, institutional culture and approaches to information literacy.

Joint use libraries have a 100 year history but have gained popularity in Australia over the past 40 years, increasing in number from 21 in 1978, to 120 in 2007 (McNichol, 2008) and growing to 130, two years later (Bundy, 2009a) . They exist most commonly between school and public libraries in small rural settings, where the shared arrangement provides for a service that may not otherwise have been possible. Joint use libraries now exist across the world between many kinds of libraries, including school, public, TAFE, university, parliamentary and health. Libraries may also share with other non-library services, such as administrative services or community health. The sharing arrangement can take the form of co-location or varying degrees of integration. McNichol (2008), a leading UK researcher on joint use libraries, uses the analogy of house sharing to illustrate the different levels of partnership possible. This extends from the lodger; where one library takes up residence in another library's building but retains its separate identity; through to flat mates or cohabitation, where there may be varying degrees of cooperation; to marriage or full integration of library services. This analogy to personal relationships is helpful in highlighting that no two joint use libraries are the same, that there is a very human element to operating a shared service and that while 'critical success factors' can be identified, there is no one recipe for success. These many forms of joint use partnerships make it difficult to generalise about joint use libraries, although some common factors do emerge.

## Benefits

The main reason that libraries decide to join services is to be able to offer a better service than that which could have been offered separately, with the funds and support available. The initial impetus is often due to external drivers, such as economic imperatives, although major researchers in this field, such as Bundy (2007a) and McNichol (2008) agree that for the partnership to flourish, it must offer more than cost-saving.

Many of the cited benefits, however, are related to getting a better return on the investment made by each institution. This includes improved facilities, such as larger and newer buildings; more extensive and diverse collections; the possibility of drawing on two funding sources, such as State and Commonwealth funding; and the ability to open for longer hours. Public and TAFE libraries combining with a university library may also gain greater access to computers and electronic resources within the library building, even if commercial licences restrict off-campus use to institutional users only.

Joint use libraries are often able to employ more staff, as they can pool funding, and are also able to then afford and attract staff with professional qualifications. Bannister (1999) stressed the benefit of this increased capacity, particularly in rural areas where recruiting suitably qualified librarians can be difficult. Bozeman and Owens (2007), Haycock (2006) and Humphreys and Cooper (1998) purport that joint use libraries also have greater opportunity for staff development, as they can usually access the programs of two institutions and two professional bodies, as well as shared expertise within the staff.

There are also benefits from a social and educational perspective as the joint use library brings together groups, staff and clients, who may not normally work together. This exposes each to a different institutional culture, demonstrates the different skills and possibilities inherent within that culture and allows for the development of a blended culture (Bannister, 1999). Public libraries, for example, have considerable experience engaging the young and the elderly, whereas academic libraries are adept at offering assistance with formal research.

The blending of public and educational libraries is reported to help members of the community to feel more comfortable in a formal learning environment, especially in communities where the participation in education is historically low (Hamblin, 2007; Sumner & Mamtora, 2007). The University Library Dean at San Jose State University expresses this well when talking of her joint city/university library. "This library, created with public dollars, enables all regardless of socioeconomic status, the opportunity to become information rich, ultimately leading to a stronger community" (Kifer, 2007, p.104). Because public libraries are open to all, patrons can access its resources without having to meet the educational achievement and financial requirement which enrolling in a University may require. By providing services to university clients and public clients, or to university clients and TAFE clients in the one building, joint use libraries help to ease the transition between informal and formal learning and between the different levels of education. At their best, joint use

libraries can capitalise on this opportunity to offer cooperative programs for the benefit of all patrons.

Another advantage, cited by MacDougall (2007), Matthews (2008) and Sullivan, Taylor, Barrick and Stelk (2006) is that staff in joint use libraries value the benefits of partnerships and are compelled to think more creatively on solutions that accommodate more diverse needs. This requires willingness to compromise. "The overwhelming message is that the key to success is compromise and the capacity to change" (McNichol, 2006, p.xxii). Without a willingness to find solutions that will be mutually satisfying, the needs of one or both sets of clients will not be met. Kauppila and Russell (2003), reporting on the initial creation of the Dr. Martin Luther King Jnr Library in San Jose, California, explain that "policies and procedures in the new library will be adjusted and adapted as our learning curve dictates" (p.256). This readiness to adapt and change for the benefit of the clients helps to explain why six year later this joint use city/university library is hailed as an example of a successful partnership.

## Challenges

There is also consensus in the literature (Bundy, 2007a; Dalton, Elkin, & Hannaford, 2006; McNichol, 2008) on the areas which may present challenges to the successful operation of a joint use library. These include using different systems for searching and circulation of collections; different salary scales and working conditions for staff; different institutional bodies with varying missions and objectives to report to; disagreements over financial contributions made by each partner; restrictive licences for electronic resources and differing information technology networks.

Many joint use libraries are formed by merging two or more existing libraries. This can create challenges because the technical systems used and the organisational system within which the staff work, is already well established. In some cases, the decision is made to retain two, or more, library management systems because of the difficulty of retrospectively moving one collection onto another system. Bozeman and Owens (2007) describe the difficulties this caused in a joint use library shared by a university and a community college in Central Florida, USA. Problems included increased collaboration needed between the collection development librarians to avoid duplicate orders, loss of time in double handling as items were catalogued onto two systems and inconvenience for students having to search two catalogues to see everything that is available.

Merging two or more distinct staffing groups can also be challenging, particularly when staff, within the shared library, have different salary scales and working conditions. When the tripartite library at Rockingham, Western Australia, was established it combined staff from Murdoch University, Challenger TAFE and the City of Rockingham. Before the decision was made to transfer all staff to the university award, the Campus Librarian reported that difference in working conditions created dissatisfaction amongst the staff. She noted "The impact of those variant awards led to low morale and a very dysfunctional staffing structure" (Hamblin, 2007, p.71). The move to one award reduced areas of conflict and, at the same time, provided a feeling of unity as staff were all working from a common set of responsibilities, conditions and rewards.

Problems seem to be magnified when the libraries sharing the joint use library are also part of larger networks, so that they are not entirely autonomous in their capacity to make decisions which will benefit the joint use library (Aird et al., 1998; Bannister, 1999). This requires the manager(s) of a joint use library to report to two or more governing bodies and must take into consideration the policies and strategic priorities of all groups. Bauer (2007) discusses the difficulties in striking a balance between adopting a consistent approach and meeting the needs of each individual institution. Sullivan, Taylor, Barrick and Stelk (2006) conclude that "These compromises can place limits on the flexibility of each organisation and, at times, may impact the ability of each to focus exclusively on its primary mission" (p.579). Describing College Hill Library, Colorado, which combines a Community College and a city library service, Sullivan et al. (2006) explain how the two directors were often caught between responding to the demands of their own institutions and meeting the needs of a shared library service.

Conflict also arises if the financial contribution made by each partner library is under constant debate. How this contribution should be calculated can be difficult to determine. Both Bundy (2007a) and McNichol (2008) stress that it cannot be determined on raw student/client numbers because of the different ways client groups use the library. Sumner and Mamtora (2007) argue that administrators must take into account the usage patterns of different clients. University students, for example, may form a small percentage of the library's user population but are heavy users of library services. Hamblin (2007), speaking of the ongoing difficulty of determining relative costs in a tripartite library in Western Australia, suggests comparing the costs of running a similar sized single sector library to help determine how much each partner should contribute. She also draws attention to a measure published by the Council of Australian University Librarians (CAUL) Statistics Focus

Group (Whitehead, 2005) which estimated that the cost of providing library services to a TAFE student was 33.2% of the cost of providing services to a university student. This was calculated based on the cost drivers determined at a dual sector library in Victoria to measure the relative levels of library use and resource provision between the two sectors. The fact that this measure has not been adopted on a wider scale highlights the difficulty of finding a measure that will satisfy all parties.

Over the past decade, technology has played a much more significant role in libraries. In higher education, in particular, much of the learning and resources are now online and require access to a secure network, using authenticated passwords. It was possible to share all library collections when those collections were in print. Now vendor licensing conditions often impede the sharing of resources between two organisations, which is made more obvious when those two organisations share a library. McCready (2002) states in his article on the role of libraries in online environments,

Paradoxically, the technological advances which have enabled wider and more flexible access to information resources have also resulted in the imposition of previously non-existent restrictions on access (p.2).

McCready suggests that the answer may be found in a single interface to online resources, in better networks to improve purchasing power, national cross-sectoral approaches to purchasing e-resources and more willingness to enter into joint use arrangements regarding technology. Universities in Australia already participate in consortium purchasing via CAUL but cost savings negotiated by this group unfortunately do not extend to TAFE and public libraries.

Technological barriers can also impact on library staff when the entry for accessing the internet, email, institutional intranets and even IP telephones are on two separate networks. Breivik, Budd and Woods (2005) urge joint use libraries to find solutions which can suit all parties if possible. They attribute the success in merging technologies in the Martin Luther King Jnr. Library to a willingness of the senior library team to finding the solution which worked best for all, rather than adhering to what worked best in the past. As an example, rather than adapt any of the existing web catalogues, web sites or data networks, the libraries decided to “migrate to a new online catalog and library information system, build a new Website and construct a new data network with the new network infrastructure that could extend to all branch libraries” (Breivik, et al., 2005, p.405).

## Critical Success Factors

Although each joint use library is unique and will have its own set of obligations and limiting factors, there is consensus in the literature (Bundy, 2003; Haycock, 2006; McNichol, 2008) on how to minimise these difficulties. Fundamental to success is a belief in the overall benefit of a joint use service and the willingness to compromise. These two factors will influence whether library staff, management and institutional administrators will make the requisite effort to find solutions that work for all.

A number of other factors are identified in the literature as being critical to the success of joint use library ventures. These factors include the provision of adequate space and a suitable location close to all groups of clients; seamless service provision where possible; committed and adaptable staff; single line management; clear written agreements; and a plan for ongoing evaluation. Both Bundy (2009a) and McNichol (2008), after conducting extensive reviews of joint use libraries within Australia and the United Kingdom respectively, agree that a library's performance in these designated areas has a significant impact on its success and are therefore considered 'critical success factors'. These factors are explored in further detail in the following sections.

### Space and location

The first critical success factor is space and location; which includes the size and layout of the building and its location on campus or in the city. The library building must be large enough and suitably designed to meet the needs of all users and be situated in a location which all clients can access and can find. This usually means a library close to suitable car parking and visible from the road, rather than hidden within other buildings. This can be a challenge for educational libraries that want to be close to each institution's teaching spaces. The tripartite library at Rockingham, for example, is situated on the university campus, 600 metres distance from the TAFE campus.

Although the Library is only 600 metres down a pathway that links the Challenger TAFE and Murdoch University Campus, it could be 600 kilometres away as far as some members of the Rockingham TAFE campus community are concerned.  
(Hamblin, McCready, & Rutherford, 2008, p.1)

Library staff report that even this small distance makes attracting TAFE clients to the library more difficult, as it is no longer convenient for students to drop in on the way to class and

the library staff have had to develop specific strategies to overcome the barrier of distance, such as outreach programs and specific events for TAFE staff in the Library.

### **Seamless service provision**

The second critical success factor is providing a seamless service to all library clients. Where possible, the service to users must be seen to be equal for all clients, even if different procedures operate behind the scenes. This includes the adoption of one system for cataloguing, circulating and searching collections; interfiling those collections on the shelves; and providing open access to all users, where possible. While the sharing of library management systems is achievable, opening access to all users is becoming more difficult as libraries purchase an increasing amount of resources in electronic format. Access to electronic resources is governed by commercial licences and normally restricted to members of the institution who is paying for the resource. Even if one partner in the library wants to share its electronic resources with members of the other partner institution, it would be contravening a legal contract to do so. This is particularly evident when one partner is a university library, as academic libraries in Australia have enthusiastically embraced electronic collections. In 2009, the President of the Council of Australian University Librarians (Wells, 2009) commented that Australian academic libraries spend 54% of their total materials expenditure on electronic resources. The majority of these resources will not be available to members of the non-university partner in a joint use library. The goal of providing seamless service is therefore impeded because much of what appears available on the web catalogue of a joint use library will only be accessible by one set of users.

### **Committed and adaptable staff**

A third critical success factor is the attitude of the library staff, particularly in relation to their commitment to the concept of a shared service and the willingness to adapt to the needs of different clientele. As Quinlan and Tuñón (2004) state, joint use libraries work when "librarians truly share a commitment to serving both groups" (p.126). Bundy (2009b) agrees, explaining that of the many factors which contribute to joint use library success, "joint use library practitioners tend to identify staffing as the most critical, particularly those relating to library staff teamwork and commitment to making joint use library work well" (p.17). The skills identified as necessary to thrive in this environment include cooperation, flexibility, changeability, advocacy, good communication, tolerance of ambiguity and innovation.

How well staff adapt to working in a joint use library seems to be influenced by what they have known before and how comfortable they are working across sectors. McNichol (2008) asserts that librarians tend to stay in the sector where they were first employed and movement between sectors is discouraged by selection criteria favouring those with previous experience in that environment. This is reinforced by staff not believing that their skills are transferrable, which may make them uncomfortable working with clients from a different library sector. Staff at the Dr. Martin Luther King Jnr. Library found that “the perception of public and academic librarianship being fundamentally different from each other was primarily a myth” (Kauppila & Russell, 2003, p.259), however this was only after staff from each sector spent some time shadowing a colleague from another sector to understand more about what they do. Calvert (2010), reporting on organisational culture in a joint use public/university library in New Zealand, concluded that most librarians shared core values. He recommended that staff in joint use libraries should be encouraged to cross boundaries and work in each other’s area to share expertise and facilitate the development of a new organisational culture. Keene and Fairman (2011), in their article on blending staff in a new joint use library in Worcester, recommend not only defining shared core values but identifying which behaviours will demonstrate these values, as a way of engaging all staff with the creation of a new shared vision.

Bauer (2007) explains that staff within a joint use library must deal with a range of clients, which may be outside of their comfort zone. Describing her experience at a joint use public/university library in St. Petersburg, Florida, she discusses the discomfort which public librarians felt in dealing with academic research questions and a similar challenge for some academic librarians dealing with young children. This led to a decision, initially, to operate two separate client services areas, which were eventually combined when they found it fostered staff resistance to helping other client groups.

There is also sometimes disparity in the qualifications expected of staff in different sectors, with universities for example, insisting on professional librarians working on Information Desks and certainly in management positions.

### **Single line management**

Another critical success factor is the professional standing of the librarian in charge of the joint use library. While there is consensus in the literature that the manager of a joint use library must have professional library qualifications, ALIA (2002), Bauer (2007), Bundy

(2009a) and McNichol (2008) also recommend the appointment of one single line of command. A single director, explains McNichol (2008), is "a simpler, more efficient and less ambiguous form of management" (p.69). Smith (2006), describing her experience of dual management in the College Hill Library, Colorado, warns "Dual leadership has made communication, decision making, planning for the future, and a unified vision much more difficult" (p.631). However Matoush (2005) reporting on the joint use city/university library in San Jose, California, where there are two library directors, argues that co-management leads to better quality decisions, shared responsibility and increased communications.

### **Clear written agreements**

A clear written agreement outlining how the joint use library will operate is a further critical success factor. Bundy (1998, 1999, 2004, 2007a, 2007b) continually reiterates the need for clear written agreements that specify who pays for what. He recommends that a broad memorandum of understanding or service agreement should address the following: agreed vision and mission as a shared library; staffing management and staff development; information and communication technology structure; leadership; membership and role of the governing board or committee; future space needs and evaluation. Ensuring that each of these factors has been addressed formally, in writing, at the outset of the partnership helps to prevent difficulties later.

Dalton, Elkin and Hannaford (2006) agree that while small ventures, such as school/public libraries, may work without a formal agreement, relying on relationships to glue the arrangement together, joint use libraries involving universities require more formal agreements. They further suggest that these agreements should follow the same criteria for success as any business alliance including; clear organisational arrangements; philosophy of organisational learning; and congruent long term goals.

The written agreement is the blueprint for how the library will operate and helps to avoid conflict at a later stage. Bundy (2009a) also makes the point that such agreements should be reviewed regularly to ensure that it continues to meet the needs of each partner.

### **Plan for evaluation**

It is recommended that a plan for evaluation should be included in the written agreement but it is important enough to be identified as a critical success factor on its own. One of the reasons that joint use libraries fail, according to Bundy (2004), is lack of any plan for

continuous evaluation. McNichol (2008) argues that many joint use libraries have insufficient evaluation due to “lack of forethought, complacency about outcomes, discontinuous leadership or lack of staff time” (p.158). To overcome this, Bundy and Amey (2006) recommend a process of ongoing internal formative evaluation using critical success factors, complemented by external reviews every five to seven years. Using this methodology, joint use libraries are guided to establish key goals and critical success factors for each partner library. This is followed by identification of common goals, development of an action plan to achieve those goals and an evaluation plan to measure the success. The evaluation plan should include quantitative data and qualitative data<sup>1</sup>. They argue that effective evaluation should be continuous, versatile, flexible and practical.

One of the ways in which university libraries check for service quality is to participate in benchmarking exercises with other libraries in the sector. Many university libraries in Australia, for example, participate in a common Client Satisfaction Survey<sup>2</sup> and submit annual statistics on their operations to the CAUL for comparison purposes. Joint use libraries do not fare well in such exercises as it is difficult to separate their services for reporting purposes.

Dual sector libraries report a similar problem.

Dual sector university libraries always drop to the bottom of any rankings – such as use per student – because the use of libraries by TAFE students is, on average, less than that of higher education students; the same is true of resource provision for TAFE students (Whitehead, 2005, p.4).

External measures, such as benchmarking with other comparable institutions, are important for the credibility of educational libraries but have limited relevance for joint use libraries. As Bundy and Amey (2006) explain “Standards for joint use libraries do not exist. The uniqueness of most joint use situations militates against the creation of standards and general evaluation criteria for them” (p. 507). The more successful a joint use library is in providing seamless service, the more difficult it is to realistically compare it with other single sector libraries.

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<sup>1</sup> In libraries, quantitative data are gathered from sources such as number of loans issued. Qualitative data are gathered from sources such as focus groups and user feedback.

<sup>2</sup> The Insync Survey (formerly Rodski) is used by over 50 libraries across Australia and New Zealand

## Possible factors influencing higher education libraries

While the critical success factors discussed are relevant to all joint use libraries, there are a number of other factors which may have particular significance in a higher education setting. These factors include the current political and educational policies that govern the partner institutions, the institutional culture of the libraries and their approaches to information literacy. I will discuss each factor in further detail, attempting to explain why each factor may provide challenges to two institutions attempting to share a library.

### Current policies that impact on libraries in each sector

A number of recent government policies are influencing the strategic directions of Australian universities and TAFEs. The *Review of Higher Education: Final Report* (Bradley, et al., 2008) proposes a target for higher education of 40% of 25- to 34-year-olds to have attained at least a bachelor-level qualification by 2020. The current attainment is 29 per cent. The report also recommends the deregulation of universities so that they may accept as many students as they wish, rather than the current system of being allocated a set number of funded student places. This allows students to carry their funding with them as they move from institution to institution, making universities more accountable to students as they vie for their custom in a much more competitive education market. It is predicted (Birrell & Edwards, 2009; Sheehy, 2010) that this will result in a rapid increase in student numbers from previously underrepresented areas, who are likely to enter university underprepared for academic study. University libraries are considering ways in which they can offer the additional support needed to these students.

Recent funding models for universities, as outlined in policies such as *Our Universities: Backing Australia's future* (Nelson, 2003), also encourage research active institutions, which lead universities to direct funds to designated areas of research strength. University libraries must support this institutional direction by providing extensive, relevant collections that can be easily accessed and by taking an increasing role in developing institutional repositories to ensure that the research output of the University is visible.

With emphasis also on improving student experience and outcomes (Bradley, et al., 2008), university librarians contribute by playing an active role in building information literacy skills in university graduates. Thus there has been a recent increase in the number of information literacy plans, strategies and frameworks developed by university libraries (Corrall, 2008)

and growing interest in how to measure, and thus prove, their impact (Broady-Preston & Lobo, 2011). In this competitive environment for funding, libraries must demonstrate how they contribute to institutional goals.

Australian TAFEs also face an environment of reduced funding and increased competition. The *Bradley Report* (Bradley, et al., 2008) supports TAFEs offering degree courses, historically the sole domain of universities, just as TAFEs are now facing increased competition from private Registered Training Organisations (RTOs) and universities offering diplomas (ALIA TAFE Library Advisory Committee, 2009). The ALIA TAFE Library Advisory Committee (2009) recently issued *Key Issues, Trends and Future Directions for Australian TAFE Libraries* which outlines future directions for Australian TAFE Libraries. The report supports the development of a 'learning commons model' where a number of relevant student services, including the library, are offered in one centre or online. Kloppenborg and Lodge (2010), reporting on the skills which TAFE library staff may need in this new learning commons environment, emphasise the importance of hybrid skills. "A staff member that has interpersonal and communication skills; general computing skills and a mix of professional skills across the traditional library skills is recognised as a composite staff member" (p.182).

The ALIA report (2009) predicts that the ongoing trend toward more flexible delivery of courses will result in a greater number of TAFE courses delivered in workplaces as competency based modules. With an increased emphasis on new technologies, e-learning and electronic resources, these students may never visit a campus or physical library. This may create more challenges for a joint use arrangement as access to electronic resources and to any student learning management system is usually only available to staff and students employed by, or enrolled with, a particular institution.

Also envisaged, is an expanding role for TAFE libraries as learning partners, with a consequent increased emphasis on information literacy. The report describes pressure to redesign library facilities to accommodate "developing partnerships with other library services, teachers and educators and with learners" (ALIA TAFE Library Advisory Committee, 2009, p.4).

Youens, Johanson and Sullivan (2008) describe a national environment of TAFE libraries facing pressure to meet the rapidly changing needs of the Vocational Education and Training (VET) sector. This includes reversing declining enrolments and encouraging more students to advance to diploma level courses. They discuss an increased focus on skilling workers and industry to thrive in an innovative economy. The report describes a VET library sector that is,

in some ways, becoming more academic in nature – with a focus on the education role of the library, up-skilling of library staff and increased reliance on technology. The researchers advocate for greater collaboration between TAFE libraries and with other divisions within the one institution. Despite the fact that they acknowledge that single sector TAFE libraries in regional areas do not do well in terms of numbers of staff, opening hours and resources, there is no suggestion that sharing services with a university library, if one exists in the area, may alleviate problems caused by shrinking budgets.

### **Institutional culture**

Current trends in educational policy impact on the institutional culture and help to define what is considered a 'good library' in that kind of organisation. Benchmarking against other libraries in the same sector can help to determine whether the library is serving its user population well, but can also make joint partnerships more challenging if the expectations for each group are conflicting. Bannister (1999) argues for cultural congruence, explaining that some sectors are closer in organisational culture and values than others. She cites TAFEs and public libraries, for example, as sharing a value of lifelong learning for adults. Benton (1998) touched on the issue of cultural conflict in university/TAFE libraries and argued that libraries should aim for cultural pluralism, where minority groups participate fully in the dominant society yet maintain their cultural differences, rather than one culture dominating another. Hansson (2006) supports this view, recommending a shift in normative institutional identity to a unique identity that is distinct to the joint use library. This is the aim in the Worcester Library and History Centre (WLHC), to be opened in 2012. Work has already begun to forge a new culture through articulation of values and vision, shared training, collaboration on policies and procedures and a decision to have roving staff rather than service desks. "By the time of opening, all the staff, regardless of background, will need to view themselves as 'WLHS staff', with a single purpose and vision, and appropriate knowledge of all service areas" (Keene & Fairman, 2011, p.189). Breivik et al. (2005) take a different view, arguing that it is important to preserve the distinct mission of each library. Regardless of whether the institutional culture is blended or integrated, Haycock (2006) cautioned that joint use libraries must be careful that the needs of one group do not impact negatively on another or at least strive to minimise that effect. Benton (1998) echoes this concern, advising that "Ideally, neither service to university or TAFE clientele should be compromised" (p.55). This does not appear to have been the case, however, in the tripartite library in Alice Springs where the librarians (Sumner & Mamtora, 2007) reported that the

university students were reluctant to work in the joint use library because of the predominance of school/TAFE students and the higher level of noise they work with.

As libraries in universities and TAFEs strive to be seen as relevant and responsive to institutional initiatives, it may inhibit a joint use library's capacity to create a new, unique organisational culture. McNichol (2008) advises against library staff becoming too concerned with their organisational identity and yet, in the current competitive environment, library managers must pay attention to institutional needs or else risk being marginalised within their organisation.

### **Information literacy**

One area of library work where the difference between sectors may be noticeable is in the role they assume in building information literacy skills. Bundy (2004) stresses that academic libraries play an important role in formal education and are well positioned to be agents of educational change. He argues that librarians can lead the partnership between libraries and academics by being proactive in teaching students how to learn. McNichol (2008) highlights the different approaches to the library's role in learning and teaching, describing the university library as more actively involved with monitoring, progression and evaluation of student learning. Libraries in other sectors, she argues, place the emphasis more on self development and exploration.

A common theme in the literature is the contribution which joint use libraries make in easing the transition between formal and informal learning. Being a member of a joint use library, that includes a university partner, helps to demystify an educational environment which may otherwise seem daunting to clients without a university background. Joint use libraries also offer the opportunity for supporting bridging programs and sharing of skills. Svensson and Hagberg (2007) describe a number of cooperative programs developed by their joint use public/university library in Sweden, including the public librarians teaching children's literature to university students studying teacher education and academics presenting on their research to the public patrons. Green and Gunnels (2005) provide examples of shared learning activities in the joint College/Public library in Texas, including a philosophy group for students, faculty and community members called the Think Factory.

It could be argued that the distinction between informal and formal learning is blurring as there is increased emphasis on building transferable information literacy skills that can be applied whenever someone has a need to learn something new. Kifer (2007) argues that the

emphasis for university libraries has historically been on conservation, scholarship and cultural heritage but has moved in recent years to accessibility, information literacy and lifelong learning. In a parallel shift, studies on the future directions of TAFE libraries (Fafeita, 2006; Youens, et al., 2008) flag the increasing role of the librarian as educator, while acknowledging that there is some way to go before the library is seen to be as integral to student learning as it is in a university setting. This recognition that libraries in both sectors play an important role in informal and formal education may provide common ground with libraries joining in partnership.

## Conclusion

My survey of literature on joint use libraries in the past decade has found considerable consensus on the benefits and challenges which a joint service presents. From these studies, there has also emerged significant agreement on the factors which help to make a joint use library successful. Central to success is the commitment of staff, managers and institutional administrators to the principles of a shared service. Because any partnership requires a degree of compromise to succeed, it is important that these key stakeholders are willing to do what is necessary to provide a good service to all clients. Other critical success factors include providing adequate space and location; providing a seamless service where possible; providing committed and flexible staff under the direction of one leader; drafting clear written agreements; and planning for ongoing evaluation.

Little has been written specifically about joint use libraries that involve a university and TAFE, although the paucity of literature and the relatively few numbers of existing joint use libraries of this kind implies that they may experience particular challenges. From my reading of the literature, I have suggested that joint use university/TAFE libraries face particular challenges because of the pressure placed on them to meet institutional goals, which may be in conflict with the needs of the shared service. Those institutional goals are a reflection of the current political and educational policies, which also affects the institutional culture of the libraries and their approaches to information literacy.

I have used the organisational framework suggested by my literature review to try and identify, from the perspective of the managers of two different libraries, what the critical success factors may be for joint use university/TAFE libraries.

## Methodology

In my research, I interviewed two managers of existing joint use libraries to explore what were the factors which contributed to, or challenged, the successful operation of their joint use library, which involved a university and a TAFE.

I approached this research from a constructivist paradigm, believing that meaning can be found in the participant's perceptions of a given situation, in this case the operation of a joint use library. Using this paradigm, explains Wiersma and Jurs (2009), "The researcher depends on the participant's interpretations of the situation and tries to capture the participant's language and point of view. Findings are thought to be context-specific" (p. 10).

I have also borrowed from the pragmatist paradigm (McKenzie & Knipe, 2006) as I was restricted, due to limitations of time and the word restrictions of a minor thesis, to focus on the perceptions of one manager at each of two sites, rather than exploring all aspects of the joint use partnership from the perspective of students and other staff. This research will therefore add to the information available in examining the factors relevant to successful joint use libraries, but could not be considered to be a comprehensive study of the many interrelated aspects.

This research is qualitative, as the context and the perspective of participants is a very important component of understanding how joint use libraries operate. As McMillan and Wergin (2006) explain, "Qualitative research focuses on understanding from the perspective of whoever and whatever is being studied" (p. 94).

## Research Design

As mentioned previously, I decided to use the organisational framework suggested by Bundy in his report on his doctoral thesis (1997) by identifying those critical factors which either contribute to, or challenge, success.

I adopted a multiple-case study design, examining two existing university/TAFE libraries in Australia, from the perspective of the manager in each library. Yin (2009) explains that even with two cases, as I have used, "you have the possibility of direct replication. Analytic conclusions independently arising from two cases, as with two experiments, will be more powerful than those coming from a single case" (p. 61).

Participants were asked to identify the factors which contribute to, or challenge, the successful operations of their joint use library. Each case focuses on these particular factors rather than attempting to develop a full understanding of the operations of each joint use library.

The perspective of the participants was captured from verbal responses to semi-structured interviews. As Bodgan and Biklen (2007) explain “With semi-structured interviews you are confident of getting comparable data across subjects” (p. 104). Some contextual data about each library was gleaned from each library’s website and supplemented by asking a series of general questions, at the beginning of each interview, about the history of the library and how it currently operates.

### **Selection of participants**

Because each joint use library is so different, an atypical case does not exist. I had intended to use size as a criterion but found that most of the identified joint use libraries employ relatively few staff. Another criterion considered was on-campus delivery of courses, but again most of the identified libraries are regional campuses of metropolitan based universities which rely to some degree on remote delivery options. The sites were therefore selected using non-random and convenience sampling, on the premise that any manager of a joint use library, involving a university and TAFE, could provide useful information for my research.

The participants were selected using non-random sampling, employing a judgemental or purposive approach. In this form of sampling, as Kumar (2005) explains, the researcher must use their judgement to select participants who will have the necessary knowledge to contribute to the study. I therefore selected the participants from the relatively small pool of shared university/TAFE libraries in Australia. Within this pool of possible participants, convenience sampling was used, with the first two managers to agree to participate selected. While this form of sampling can result in selecting a library or manager that is not representative of the whole cohort, this was considered a small risk when my main aim was to explore the individual manager’s perception of his or her particular experience.

The potential libraries were identified by emailing all university librarians in Australia and asking them to forward details of any of their campus libraries which shared services with a TAFE. This resulted in a list of 11 libraries; three in Western Australia, one in Queensland, four in New South Wales and three in Victoria. Libraries in which my university, La Trobe

University, is involved were excluded to avoid any possible conflict of interest or bias in reporting related to my position as a senior librarian with this institution. I have not included the list of potential libraries in this report due to concerns that the two libraries involved in this research may be identifiable and that would breach confidentiality.

I had hoped to confirm details of each library by using *ALED9 Australian Libraries: the Essential Directory* (Bundy & Bundy, 2009) and then cross-check details on the Library's website. This was more difficult than anticipated. The Directory lists contact names and details of nominated managers, as well as information on staffing size and web addresses. However, both the Directory and the websites tended to list the main university library only, with sometimes location and contact details for the campus library, but rarely any details such as staff and collection size at a campus level. The other difficulty when trying to confirm that a particular library was joint use was that the Directory classified libraries serving either a university or TAFE as 'academic'. Other joint use libraries were marked 'academic/public' or 'school/public' but there was no distinction by classification on joint use university/TAFE libraries. I therefore had to rely on the feedback from the university librarians who responded to my email. The background details provided on the two libraries in this study came directly from the library manager, based on information gathered in the interview, and some preliminary research on the Internet.

## Data collection

Because the initial contact was with the University Librarian who had provided contact details for the manager, both participants had received prior notice that I would be contacting them to invite their participation in my research, with their University Librarian's approval.

Both managers were contacted, via email, inviting their participation in one telephone interview each. Attached to that initial email was a Participant Information Statement explaining the purpose of the research, the data collection process, how the information would be used and how it would be reported, in accordance with ethics guidelines. Also attached to the email was a consent form for the participant to sign. These documents had been previously approved by the La Trobe University Faculty of Education Ethics Committee (Approval number RO66/10)

Once I received the signed consent form, I contacted each participant, via email, to confirm a date, time and a contact number for the telephone interviews. A copy of the interview schedule (see Appendix 1) was also sent to the participant so that they had time to consider their responses. It was made clear to the participants, in the Participant Information Statement, that the interview would be audio recorded and this was reiterated prior to the commencement of each interview. This was executed successfully using an IP telephone on speaker and a digital recorder. I also took notes using an interview protocol, as described by Creswell (2007). This provided a method of systematically capturing the data under broad questions and helped me to not lose sight of the research question in the interview.

At the beginning of each interview, I explained again that I was seeking only the participant's perceptions, that each participant would receive a transcript of their interview and would have two weeks after receiving that transcript to withdraw from this study if they no longer wished to participate. After receiving a copy of the transcript, both participants confirmed, via email, their willingness for their contribution to be included.

The interview questions were piloted with the Campus Librarian at one of the three joint use university/TAFE libraries, where La Trobe University is a partner, as recommended by Creswell (2007) and Yin (2003). The librarian provided a professional assessment on the appropriateness of the language used, whether the questions were clear and objective and whether the questions were open ended enough to capture the participant's viewpoint. It also gave me an opportunity to determine how long the interview may take and to assess my own interview style to ensure that I was not leading the participant in any way.

## **Trustworthiness**

Silverman (2006) argues that a constructivist approach to interviews seeks to capture how participants make meaning of their experiences based on the cultural context, rather than assuming that a 'truth' will be discovered. This has implications for how necessary validity checks are as a participant's perspective does not need to be validated by an external source. However, measures were put in place to ensure that the research was conducted ethically and so that the participants could feel trust in the process.

To ensure that the research was conducted ethically, the research proposal, Participant Information Statement and interview questions were approved by the La Trobe University Faculty of Education Ethics Committee, prior to the research commencing, and the

participants signed a consent form, indicating that they had read all this information before the interviews were scheduled. The participants were assured that they could withdraw from the study should they be unhappy with the process or reporting and that no information, which could identify the participants or their libraries would be used in the report, with only Library/Manager A or Library/Manager B referred to.

To build trust in the process, each participant was given a clear description of how the data would be collected and used, were given advanced notice of the questions to be asked in the interview and an opportunity to check the transcript for accuracy. With member checking such as this, the validity procedure shifts from the researchers to participants in the study. Creswell and Miller (2000) explain:

It consists of taking data and interpretations back to the participants in the study so that they can confirm the credibility of the information and narrative account. With the lens focused on participants, the researchers systematically check the data and the narrative account. (p.127)

Because the original ethics approval did not include provision for asking the participants follow up questions, the transcripts were approved by the participants as an accurate record of the interviews, but were not amended or extended. The questions asked in the interviews were open ended to allow participants to elaborate on answers, to avoid compromising interpretation validity (Lewis, 2009). I also used direct quotes from the interviews extensively in the Discussion of Results to allow the reader to 'hear' the participants' own words.

External validity or the degree to which any conclusions may be applicable to a generalised situation, are limited in case study research. I attempted to increase transferability of the findings by applying the same research strategy to more than one site, by conducting, transcribing and categorising both interviews myself to ensure consistency in data collection and analysis, and by making a posteriori judgement (Wiersma & Jurs, 2009) made on the basis that the results represent a reasonable possibility of being applicable in other situations.

Despite my attempts to minimise any negative impact on the validity of this research as outlined in this section, I acknowledge the limitations of the study. The sample is small, including only two out of a possible eight libraries, and only one main data source, the transcript of interviews, was used. An interview schedule was given to the participants prior

to the interviews which, while it allowed the participants the time to consider their answers, may have the potential to lead the interview. Each of these decisions was made for pragmatic reasons: to confine the research and subsequent minor thesis within the timeframe and with regard to the limitations upon my capacity to travel to distant locations to conduct the research.

## Data analysis and reporting

Transcripts of interviews were typed, scanned, categorised and coded thematically, using the data analysis spiral described by Creswell (2007). I used a spreadsheet to record various responses under broad categories, using the critical success factors defined in my Literature Review, and could then sort by sub-themes. This helped to identify which factors were commented on most, what were common themes and to highlight differences in opinions.

Stringer (2007) advises that the "purpose of analysis is to identify data (information) that is pertinent to these issues and questions [posed as research questions]" (p. 100). Using this spreadsheet method, I was able to determine which factors contributed to, or challenged, the successful operation of the joint use library and used these sub-themes in the discussion of results. I have employed a descriptive framework (Yin, 2009) to analyse the data under these headings. The headings suggested by the participants' responses closely matched the critical success factors emerging from my literature review, with the exception of 'plan for evaluation' and so I have used similar headings in the 'Discussion of Results' section. The responses which did not relate to any of the first five headings listed below, were grouped under the broad theme of 'institutional culture,' as they related to the different way the clients and institutions appeared to view their library service.

- Clear written agreements
- Seamless service provision
- Committed and flexible staff
- Manager characteristics
- Space and Location
- Institutional culture

I have elected to present my report on the data as a cross case analysis. In this approach, as described by Yin (2009, p.172), each section is devoted to a separate cross case issue and the information from the individual cases dispersed throughout. In the Discussion of Results, I have provided some background information on each library, but then drawn on both

interviews to explore the major themes which emerged from the data. I have presented this as a narrative, with sub headings to assist with sign posting, but hopefully not as a distraction to the narrative. All direct quotes from the participants have been indented and written in italics. In places where the participants mentioned the names of their institutions, I have replaced the names with generic terminology, to ensure anonymity is preserved.

In the Summary section, I have reflected on what the participants in my study identified as factors which contribute to, or challenge, the successful operations of a joint use library as compared to the factors identified in the literature. In this final section, I also reflect on what I have learnt from this research which I can apply to my own situation and I make some suggestions for further research.

## Discussion of results

Two interviews were conducted, via telephone, with managers of two separate joint use libraries in February 2011; one with Manager A and one with Manager B. After reiterating the purpose of the interview and establishing rapport as one manager to another, each interview began with a series of questions about the size and organisation of their libraries and the reasons for initiating a joint use service. This information is summarised to provide some background information on each library but without identifying the library or the manager. Each manager's perception of what contributes to, or challenges, the successful operations of their library is then explored under the following headings: clear written agreements; seamless service provision; committed and flexible staff; manager characteristics; space and location and institutional culture.

### The participants

While I attempted, in planning this research, to limit the possible participants to a defined group with common characteristics, this proved very difficult in relation to joint use libraries. The two managers interviewed were selected because they were employed in joint use libraries where there was a university and a TAFE working in some form of partnership to provide a joint library service. Library A had initially involved three partners, including a university, a TAFE and a public library, but had disbanded that partnership in favour of sharing only with the university and TAFE. Library B involves three current partners, including a university, TAFE and a secondary school.

I sought examples of libraries where the operation of the library had to be negotiated between the partner organisations, rather than one organisation contracting another for their library services. While both of the sites selected met this criterion, there were still many layers of complexity in how each were funded, with a combination of some aspects of the operation jointly funded and some, separately funded, as well as different aspects of their operations controlled by different institutions. This emphasised how unique each joint use library is and how complex is their operation. It also highlighted the skill required of the manager to operate with a certain level of ambiguity.

The intent of the interviews was not to compare the two libraries, but to identify the factors that each manager perceived contributed to, or challenged, the successful operation of their joint use library. The managers did however agree on many points and these are highlighted

in the discussion to emphasize the potential importance of these factors in a higher education setting.

## The libraries

Library A is a joint use library shared by a university and a TAFE. The campus on which the Library is situated is a shared campus with classroom facilities, including the library, shared by both TAFE and university staff and students. It services a shire of approximately 130,000 people. The university equivalent full time student (EFTSU) population on campus is approximately 500, with the TAFE EFTSU population approximately 11,000.

This library is one of four campus libraries of a metropolitan based university and is situated approximately 40 kilometres from the capital city. The library is also part of a state wide network of TAFE libraries.

The university and TAFE collections, within the library, are shelved separately, with approximately 21,000 print items; approximately half owned by the university and half by the TAFE. There are nine library staff, six employed by the university and three by the TAFE. The Library is co-managed by the university employed Library Manager and the TAFE employed Learning Hub Manager.

Library B is a joint use library shared by a university, a TAFE and a senior secondary school. The campus on which the Library is situated is a shared campus with classroom facilities, including the library, shared by the TAFE, university and school staff and students. The university EFTSU population on campus is approximately 1,150, the TAFE EFTSU population is approximately 900 and the senior school population is approximately 450. The campus is situated in a large regional town of approximately 65,000 people and is 400 kilometres from the nearest capital city. The Library is approximately 200 kilometres from the main university campus library in another regional city. The library is also part of a state wide network of TAFE libraries.

The combined collection has approximately 50,000 items which are interfiled. There are 12 Library staff; some of whom are employed separately by the university, TAFE or school and some whose positions are jointly funded by the partner institutions. The Library Manager is employed by the university but the position is funded jointly by the partners.

## Reasons for joining

The managers interviewed have been in their positions for nine and sixteen years respectively and had been employed early in the history of their joint use library. They understood the reasons for the library's formation and had been instrumental in developing services to meet the diverse needs of their clientele.

In both libraries, saving money was cited as the main reason for joining.

*I don't think that there was anything driving it except, as these things are, a thought that if we all combined, it would save money somehow, to be quite honest.*

*[Manager B]*

This translated into improved resources for their combined student base, an opportunity for the university to expand into new geographical areas and for the TAFE to attract more students, all at a lower cost than if each institution tried to do this alone.

*He [the local federal councillor] was very keen to get a university into [the town] and the only way this was going to happen was if there was some sort of joint partnership...It was a way for [the university] to expand up north without it costing too much money.*

*Since the [university] has been with the TAFE there has been a lot more activity around that campus so it is a lot more vibrant now. This encourages more students.*

*[Manager A]*

The shared higher education campus was also seen as a way of raising the educational aspirations and qualifications of the local population.

*It was also a way to raise the number of professionals or people who have degrees in the area because this is a fairly low socio-economic area. [Manager A]*

This is a similar ambition to that outlined in the recent Bradley Report (Bradley et. al., 2008) although the solution is seen to lie more now in making each sector more competitive, rather than encouraging shared resources between universities and TAFEs.

It is noteworthy that both libraries are situated on a shared campus. This means that both the university and TAFE campus, and for one campus also a senior school, is on the same

site, even though they are separate institutions, so the sharing of a library is a logical consequence of sharing of resources on that shared campus.

*If there were three libraries at one campus you can see that that is probably a bit of nonsense. And I think in one sense everyone has got more than they would have had if they were stand alone libraries. [Manager B]*

It also means that there is some form of campus wide agreement on sharing library services. However, each institutional library has still retained various responsibilities such as collection development and payment of staffing, so there is considerable complexity in the arrangements which govern the sharing.

Both managers agreed that the joint use library had enabled each institution to provide more for a reduced financial outlay. This is consistent with the reasons for joining cited in Bundy's (1997) review of joint use libraries in South Australia and McNichol's (2003) review of joint use libraries in the United Kingdom. The reasons included a larger number of staff, which enabled longer opening hours, and a bigger pool of resources, with the opportunity to read more widely.

In both libraries, the university library was seen to be better resourced and the TAFE clients benefited from the more extensive funding. This appeared to be related to the fact that the library is seen as an integral component of university study and is funded as a core resource, whereas the funding for TAFE libraries, according to Manager A, was more fluctuating.

Manager B acknowledged that while a more extensive collection offers breadth, it can also be more confusing for a specific cohort because the resources are not as targeted to that one group.

*I think a lot of students feel that in some way, in terms of print resources, it isn't what they want...They feel a bit at sea because the collection is a lot bigger than they are used to. [Manager B]*

When asked what were the most important factors for sustaining a successful joint use library, Manager A responded having the partnership principles well documented and agreed to; adequate funding from both partners; committed and dedicated staff and good communication between managers. Manager B identified the following as crucial factors; the commitment of staff to the concept of a joint use service, having all library staff employed by one institution, managing client expectations and staff who are flexible and

good team workers. In the remainder of this chapter, I will discuss each of these aspects in more detail, using the headings suggested by the relevant critical success identified in my literature review. The factors which did not relate directly to one of the aforementioned categories, have been grouped under the heading of institutional culture, as they related to the different approach to library services by each institution.

### Clear written agreements

Because the libraries studied were situated on shared campuses, in both cases there existed some form of written campus level agreement. For Library A, this is a legal agreement at the campus level which includes mention that the library service would be shared and governed by a Library Advisory Committee (LAC). This is supported by an operational agreement at the library level which, although not a legal document, specifies the library's operating principles and specifies operational details, such as opening hours. This agreement is reviewed annually by the LAC. Membership of the LAC includes the Library Manager, the TAFE learning hub manager and their two respective supervisors.

*We sign off on that on a yearly basis. And it basically stipulates how we run the library service. That is not an actual legal document – just a signed document between the two library managers or the libraries. [Manager A]*

At Library B, there is only a loose Memorandum of Understanding at the campus level.

*What governs this whole campus is an MOU and the MOU is so loose that – like, it's probably not a legal document that could be enforced anywhere...There are no written guarantees of a whole lot of things. [Manager B]*

Any operational issues are decided within the Library by a process of collaboration with the different institutional library staff.

*Well basically we do it in-house. If we think we ought to change this because TAFE students need this or school students need that, I will go and talk to the librarian who is concerned with those students. And then we might discuss it at a staff meeting and open it up to everyone. [Manager B]*

In both interviews, the participants explained that most times the joint use library operated smoothly, despite some lack of clarity in their written agreements, but it was at stress points, or when a difference of opinion did develop between members of the different institutions,

that a written agreement was most needed. For Manager A, the agreed principles were important because any decisions could be measured against those principles.

*So everybody has a joint understanding that we want seamless service. We want the students not to really be able to tell who is servicing them, that type of thing. That the facilities are meant to be joint. Just because the [university] is paying for the furniture, doesn't mean that [the TAFE] students can't use it. That's the sort of misconceptions that come in when you don't have that sort of thing documented.*  
[Manager A]

Tong and Kisby (2009) describe how the University of Central Florida, in the USA, achieved this in the written agreements with a number of their joint use university/community college libraries, explaining that specifying shared goals and expectations helped to develop a culture of collaboration.

For Manager B, a clear written agreement would remove the reliance on goodwill alone.

*And the library has nothing really underpinning its existence except an agreement by the people who started it and the goodwill of the people here who want it to keep continuing.* [Manager B]

Both managers interviewed expressed a desire for clearer written agreements. This echoes Bundy's (2007a) assertions that a broad memorandum is necessary and should address the following; shared vision and mission; division of costs; staffing and staff development; information and communication technology; management and role of a governing board; future space needs; and evaluation. Further more, he stipulates that "the agreement should be supplemented by policies and procedure documents which are the responsibility of the library manager and which can be regularly revised during the life of the agreement" (p. 7). My own joint use library is governed by a broad memorandum, lacking the detail recommended by Bundy. In the absence of such detail, there is more pressure on me, as the manager, to negotiate and collaborate regularly with the university and the TAFE to find approaches that satisfy all.

## **Seamless service provision**

How the libraries operate in terms of what is and what is not shared varies greatly. The clients of the two libraries in this study shared a building, and the facilities within that

building, and strived to have no differentiation of service at the desk. Each institution purchased their own resources and, to some extent, employed their own staff.

Library A has separate collections, circulation systems and technology for students and staff of each institution within the library building, although students approaching a service desk were not aware of two circulating systems operating. They could borrow from either collection and the library staff at the desk issued the book on the relevant system. Rather than diminish a sense of 'one library' the manager argued that it provided a simpler system, which resulted in a better service for each client group. It was simpler because each collection and system was geared to that group of students and a better service because it gave the students immediate access to the wider networks that they were entitled to, either the entire university system or the state wide TAFE system. The manager explained that this set up ensures that the student has access to a library service equal to anyone from that institution at another campus, but also equal access to others using the joint use library.

*We try to offer two kinds of seamless service in that they get everything that they would get at another campus of their own institution and seamless in that if they ask a question at the desk anyone will answer it. [Manager A]*

Library B has a more complex sharing arrangement with some staff and resources paid for separately by the institutions involved and some funded jointly with all partners contributing. All collections are interfiled and available to all users, with one university owned circulation system used, although the items owned by TAFE also appears on a separate TAFE network catalogue. Because the negotiation to provide joint funding for these resources was done at the campus level, the Manager reported few problems for the Library in obtaining what it needed.

Despite the need for compatible technologies within the library emphasised by Breivik et al. (2005), only Library B had computers that are owned jointly by the partners and can be used by any student or staff member. In Library A, the computers for university students and for TAFE students were situated in separate areas of the library and accessed different networks. The manager explained that they had tried dual logins on shared computers but found that it created problems with maintenance, as neither institution would take responsibility for repairs. Having separate technology meant those lines of responsibility were clear and response times to address maintenance issues were improved. The issue therefore seemed to be more about having clear lines of responsibility for computer and network maintenance, than having to use one system for all clients. This highlights the

dependence of educational libraries on other parts of their institution, such as IT departments, to operate effectively. Even if the library staff are fully committed to a shared service, they need to work with other departments outside of the library who may not share the same imperatives.

### **Committed and flexible staff**

The importance of employing staff who were committed to the concept of a joint use library was emphasised by both managers. This began with recruiting staff who understood what working in a joint use library may involve and could identify with the joint use concept.

*So basically you choose your staff so that they have understanding of what their role is in the partnership. And staff who are committed to actually working quite well with both parties. [Manager A]*

The managers made this very clear during the employment interview, including questions on how staff said they would interact with students and staff from another institution, looking for an attitude of willingness to be flexible and inclusive.

*More and more I think, I look for people who may not have the exact skills you want but they may demonstrate the right attitude and I will go for that every time. [Manager B]*

This was consistent with the importance placed in the literature on staff who were flexible and committed to the concept of a joint use library. As Quinlan and Tuñón (2004) state, joint use libraries work when “Librarians truly share a commitment to serving both groups” (p.126).

Both managers stressed the importance of library staff who could work as a team and were dedicated to assist all clients, but they had divergent opinions on whether it was desirable for the staff to be employed by the same employer. Manager A commented that staff employed by different organisations was a positive factor, as institutional staff had a deeper understanding of the needs of their own clients and felt more committed to protecting their interests.

*I think when you have staff provided by one organisation, in terms of my perspective of it, you actually lost something. Because they are not in the one management line as the student organisation they do lose some perspective on where that*

*organisation is going. I tend to find that by having the separate staff, you have staff who are really expert in what their organisation needs. [Manager A]*

Manager B disagreed, indicating that the different employment conditions which exist when staff are employed by different organisations created additional challenges. This manager expressed a belief that most other joint use libraries overcame this by having all staff employed by the one institution. I have not found this to be the case in my reading of the literature; in the three joint use libraries in which my university is involved, and for the two libraries included in this study. My staff are employed by different institutions and it does create challenges when trying to monitor leave or assign staff to rosters. Manager B believed that a single employer would simplify the management of the library

*We are unusual as a joint use library in that joint use libraries usually have a single employer – if they are trying to be successful... it would make life a lot easier.*

*[Manager B]*

Depending on which institution the staff member in Library B worked for, their working hours, salaries and employment conditions differed. Some staff were required to work at evenings and weekends, for example, and some are not. While most times staff overlooked these differences and worked harmoniously together, Manager B explained that, at times of stress, those differences caused additional resentment.

*You are working with colleagues who have different hours, different remunerations, different holidays. All of those things at times, I think, rankle with people who work here but a lot of the time those things can be pushed to one side. But if it is something that right from the beginning you would find intolerable, I always say to people, if that is your feeling please do not accept this job. [Manager B]*

This underlines a need for compromise and conciliation, not only amongst the staff who work together, but in the manager, who must find a solution that will be acceptable to all staff.

Joint staff development can also present challenges. In both libraries, training on desk related duties seems to be offered jointly to all staff but all other staff development was managed by the institution to which the staff member belonged. Manager A explained that this was more related to the individual's role, rather than the institution to which they belong and that, even in the one organisation, not all staff received the same level of staff development.

*Again that doesn't really relate to being separate organisations, it is more about what people do in their jobs. So our liaison librarians will have staff development that some of my other [university] staff won't go to because it doesn't relate to what they do, if that makes sense. [Manager A]*

Manager B tried to offer joint staff development activities, where possible, but found that difficult if the costs were high enough that it required funding from all partners. Getting all partners to agree that an activity was relevant and worthwhile could be challenging, particularly if the activity was aimed at improving services to one particular cohort.

*Sometimes I can find money out of our budget but if you need to go cap in hand it is really hard to get three partners at once to agree that they will give money or allow travel to an event that is not really relevant to the school or the TAFE. That is the hard thing – to do staff development all together when the staff are recruited from three partners. [Manager B]*

## **Manager characteristics**

While the commitment and attitude of library staff is important to the successful operation of a joint use library, the characteristics and attitude of the manager is crucial. In the absence of clear written agreements, one consistent set of library systems and staff employed under the same working conditions and expectations, the manager must be able to cope with a level of ambiguity and be able to negotiate a solution that will be acceptable to all.

The managers interviewed identified skills in diplomacy, negotiation, compromise and good communication as critical to managing a joint use library. These skills are necessary to work in partnership with other managers and staff within the library, over whom the Manager may have no supervisory control, as well as executive staff from partner institutions who the Manager is not employed by.

*In some ways it is an impossible situation because you have a responsibility to manage the place but you don't have the full authority. Any authority I have here is really based on the goodwill of those people who aren't really in my direct line of supervision. [Manager B]*

Further challenges can be found when the staff member's institutional supervisor may not agree with the manager's priorities.

*If you are a school librarian or a TAFE Librarian, you actually – in a line sense – report to someone else as well as to me. In some ways that's a problem because we could be in conflict in what I see as a something I could reasonably ask you to do here but your immediate superior in TAFE or in the school might think it is unreasonable.*

*[Manager B]*

This diluting of a manager's authority over their staff led Bundy (2007a), Hamblin (2007) and Haycock (2006) to conclude that a single professional library manager was preferred.

Manager A, who shares management with a TAFE librarian, felt that shared management can work as long as communication is open and decisions are discussed before implemented.

The Manager had worked with one co-manager who had not communicated well, and the manager described this as *'probably the worst 18 months of my life'*. The manager concluded that the personality of the manager has a lot of influence on how the partnership works.

Manager A identified, as a particular challenge, the constant changes in the position of the TAFE Learning Hub Manager, which made establishing a shared vision more difficult.

*So that's a big challenge because every 12-18 months you have to start your partnership relationship with them again. And bring them up to speed on where you are kind of heading and what the partnership philosophies are. [Manager A]*

Even though Manager B did not need to co-manage with another librarian, the manager experienced similar challenges in trying to explain to new supervisors the principles behind the operation of the joint use library. This meant not only having to confer with one's own institutional supervisor but also the relevant heads of the other partner institutions.

*The complexity is...just trying to explain it to someone, they just look at you disbelievingly. How does this actually work... [When] there is new people come in or you get a new TAFE director or a new head of campus, all that negotiation has to start up again so that this person is bought in to how people think the place operates. And you always get that stunned look on their face. [Manager B]*

Manager B also emphasised how important it was for the manager to be able to develop a good working relationship with senior administration staff.

*...if there wasn't goodwill from any of the three partners, I would find it very hard to stay in this job. Because we have no underpinning agreement of any sort that we can fall back on or refer to, it is part of my role to liaise with campus executive here and keep them on side and keep them informed because I don't have and they don't have an underpinning agreement. [Manager B]*

While this implies that a great deal of goodwill was present, and that the manager was an effective communicator, the manager explained that the goodwill is tested at times of stress.

## Space and location

The participants did not identify space and location as a critical success factor for their joint use libraries and yet their comments are relevant to this issue. Bundy and Amey (2006) emphasise the importance of having a joint use library sited close to their client base, which can be a challenge when those clients are based on two different campuses or dispersed over a city or town. Because both libraries reviewed were situated on a shared campus, the proximity of the library to other university and TAFE facilities was not a problem. The managers spoke positively of their library's position at the heart of their campuses.

However, both participants felt some frustration with the capacity within their existing library buildings to meet a range of client needs. They appreciated that their libraries were situated at the centre of each campus but wanted more flexible spaces within. As with all libraries, how well the facilities can be made to match client needs is tied to funding levels.

Manager B reported that having an open plan building that could not accommodate this variety of learning needs, did create problems with noise levels in the library.

*The architecture of the Library is a big barn sort of space and that doesn't help contain noise to one place. It transmits beautifully from level one to level two. [Manager B]*

This was particularly resented by the university students who felt that the library should be a quiet place of study, which Manager B notes may be an unrealistic expectation in a modern educational library.

Manager A explained that a new building was in the planning stages as the current library, situated in an old TAFE building, did not allow for modification to be made to meet changing needs.

Both participants emphasised that these varying needs were related more to the changing nature of higher education, where a variety of learning spaces are required to cope with quiet study and with interactive group work, that differing needs of TAFE and university students in a joint use library.

*They are concepts that make sense for any library...the space needs to be flexible because, as we're seeing, the libraries are needing to have less space for collections and more space for group study...more of the social spaces, spaces where the students come to actually work as opposed to just borrowing books and taking them.*  
[Manager B]

## **Institutional culture**

From my review of the relevant literature, I suggested that a significant area which may present challenges for a university and TAFE sharing a library was their different institutional cultures. This was not supported by the manager's responses. There was little direct mention in either interview on the impact of different institutional cultures. However, their responses to other questions alluded to different approaches between university libraries and TAFE libraries in relation to the students' expectations of their library, their need for assistance with developing information literacy skills, the degree of formal evaluation expected and the levels of funding provided by the home institution.

Manager B identified one of the greatest challenges to the successful operation of the joint use library was managing the expectations of the different client groups.

*We have different expectations from the different student groups. And the university people whether they're young or old often think that I've come and I should hear a pin drop in the library...They believe that you should shush everyone and have them absolutely quiet. School kids, I think, often see their library as a place to socialise. So that is completely, immediately, at odds. TAFE people, I think, go between both of those. And I lot of TAFE people I have to say...we never see them.* [Manager B]

Both participants commented that the university and TAFE clients shared a common educational goal, although at a different level, and that they had more in common than a

university sharing with a school or public library. Manager B commented on the different levels of assistance required as an example of this. It was observed that much of the TAFE training was offered now as pre-packaged learning resources, with limited expectation that TAFE students will need to work beyond the sources already provided. Information literacy for TAFE students was therefore focused on orientation to the library. It was noted that the university students are expected to read more widely and to research more independently.

In both libraries in this study, information literacy was conducted separately for client groups by the librarians employed by that institution. While staff at service desks handled any enquiry from any student, regardless of institution, further training or more complex questions were referred to the institutional librarian.

*...what we find is the level of information literacy needed across the two institutions is different...So each [TAFE] class comes in to do an introduction but they don't do much past that. At [the university] the focus is on embedding information literacy.  
[Manager A]*

The evaluation process also differed between institutions sharing the joint use library. In both libraries, the university partner conducted more regular, formal evaluation of client satisfaction, as part of a university library wide process. Both managers commented that it was more difficult to obtain feedback from TAFE clients in this way, even though they were included as a client group on the survey, because they were not as accustomed to responding to online surveys or to regularly checking student email as were their university counterparts.

Other methods were used by Manager B to gather feedback from TAFE clients, such as visiting teaching classes to discuss library support, but it was acknowledged that many TAFE students do not see a need to use library services.

In terms of internal review of the joint use service, Library A has an annual review of their operational agreement which allows adjustments to be made in response to feedback from the university library manager and the TAFE library manager. Library B employs a variety of client feedback mechanisms, such as a library blog and suggestion box, but only makes adjustments to the operational processes of the library as the need arises. This supports the assertion made by Bundy and Amey (2006) that few joint use libraries have regular planned evaluation of their processes.

Another issue, which appears to relate specifically to the organisational culture, is the level of funding provided for library services. The university tended to provide more generous funding and were more willing to fund longer hours, which are accepted as essential for a university library. Manager A identified this as a major challenge to the success of the operation of the joint use library.

*Because we are not joint in that one institution pays for the joint staffing, the TAFE is free to reduce their funding when ever they want to...Every time they get a funding cut the first place that gets a funding cut is their libraries.*

*In my mind the most difficult part of the partnership is the fact that the TAFE just don't get funded anywhere near adequate for their needs, let alone a joint partner needs. [Manager A]*

While Manager B did not specifically mention funding levels, the issue was raised when discussing staffing, that university employed staff had to work at nights and weekends, but TAFE and school employed staff did not. This raises the question, often faced by managers of joint use libraries, whether one partner should have to pay for a service that they would not normally offer, yet are gaining benefit from.

In this section, I have provided the manager's responses organised according to the critical success factors identified in the literature review. Although the managers did not raise issues that fell outside of this organisational framework, they did place a different emphasis on what was most important. This will be discussed in the following section.

## Summary and recommendations for future research

The literature on joint use libraries over the past decade indicated a number of key factors which, depending on their execution, can contribute to, or challenge, the successful operation of a joint use library. These included the commitment of staff to the principles of a shared service; the provision of adequate space and location; provision of a seamless service where possible; quality staff under the direction of one leader; drafting of clear written agreements and a plan for ongoing evaluation.

There is a paucity of Australian literature on joint use libraries involving a university and TAFE. This research helps to address this gap, albeit in a very limited way given the size of the sample studied. The key factors which the two managers interviewed identified were very similar to those critical success factors identified in the literature, with some variance in opinion on the value of having staff employed by the one institution and what seamless service provision entails.

The participants agreed that the commitment of staff, including managers and institutional administrators, to the principles of a shared service was extremely important. This was emphasised in many aspects of their conversation. Both managers emphasised the importance of this when recruiting new staff and what challenges it can present when it is lacking. Both managers spoke of the importance of inducting new staff into an understanding of the shared service.

There was also agreement of the importance of clear written agreements. Manager A wanted the partnership principles documented in a written agreement to ensure commitment to delivery of a seamless service, while Manager B emphasised the need for a written agreement to underpin the operation of a joint use library to reduce the emphasis on goodwill alone.

In addition to a commitment to the concept of a joint use library, the quality of the staff was emphasised, in particular the need for flexibility, team work, compromise and goodwill. As one manager mentioned, these are characteristics useful in any workplace, but even more vital in a workplace shared by staff of more than one institution. Although the literature supported the employment of staff by one institution to avoid resentment over different working conditions, one manager strongly supported this, whereas the other argued that

having staff employed by different employers improved the quality of service offered to each client base.

The literature recommended the appointment of one single manager as "a simpler, more efficient and less ambiguous form of management" (McNichol, 2008, p.69). Although the desire for one single manager was not specifically mentioned by the participants, Manager B did cite, as a challenge, the difficulty of trying to supervise a range of staff who have no official reporting line to the manager. Manager A works with a co-manager and felt that this worked as long as the communication was good and that one manager considered the impact on the other manager before a decision was made. Manager A did, however, comment on how difficult it was when the position of co-manager changed regularly; therefore some consistency in the relationship appears to be important.

Both managers agreed with the literature that the provision of adequate space and location was important, although they felt that this was a consideration for all libraries and not specific to joint use libraries. This can be an issue when the partner organisations are not situated together, but both libraries in this study were located on a shared campus and so it was not identified as an issue for them. The managers also believed that the kinds of flexible spaces required within the library building were common to TAFE and university and reflected changing educational approaches to more group work and problem based learning. Both managers had experienced more problems when trying to combine with a non-higher education partner, such as public or school library, because the differences in client expectations were more marked.

Both managers strived to deliver a seamless service to the different clients in their libraries. By seamless, they meant that any student entering the library could approach any staff member and be assisted without prejudice. It did not mean, as much of the literature suggested, a need for combined collections, circulation systems and technology. For these two managers, those kinds of differences were manageable and, for Manager A, the library operated more effectively when the systems were kept separate. Accepting that the systems were separate, but concentrating on how clients are approached and served, seemed to work better for them.

Neither manager volunteered evaluation as contributing to, or challenging, the successful operation of the joint use library. Even though both libraries undertook various forms of evaluation, they still appeared to be related to the requirements of the individual institutions rather than a joint use library evaluation. This does not mean that regular evaluation of the

joint use service may not improve the service in the libraries investigated, only that the managers did not perceive this as an issue.

## Key factors

In agreement with the experiences of other joint use libraries, the managers interviewed perceived that the quality and commitment of staff, as well as the quality of the written agreement, are major contributors to the successful operation of a joint use university/TAFE library. Other factors which these participants identified as key factors in ensuring the successful operation of a joint use library were managing the expectations of diverse client groups; having adequate funding from all partners involved; and good communication between all key players.

What was not mentioned is the impact of each of the partners being part of a joint use library, as well as part of a larger network of libraries for that institution. Sullivan (2006) acknowledges the difficulties in meeting the needs of both the individual institution and the joint use library, "These compromises can place limits on the flexibility of each organisation and, at times, may impact the ability of each to focus exclusively on its primary mission" (p. 579). As a manager of a joint use library, I find that the need to comply with university library directives does, at times, make it difficult to make decisions which may be in the best interest of the joint use library. Even though the libraries at both sites in this study were one of several for the universities involved, and also part of a state wide network of TAFEs, this need to accommodate two sets of institutional directions and priorities were not mentioned as a challenge.

What emerged from the managers' responses is that with the right attitude, and goodwill from the library staff and administrators, even a seemingly difficult situation can be made workable. Both managers described a history of their joint use libraries where they had tried a number of approaches and had adapted their processes accordingly. An example of this is in Library A, when individual banks of institutional computers replaced the dual log-in computers available to all students due to ongoing problems with maintenance. Their libraries did not always match the ideal environment as described by McNichol (2008) and Bundy (2007a), yet had survived for a decade or more. As Bundy observed "One simple measure of success, given past joint use library failures, is survival" (p. 6). Both managers were clearly proud of their libraries and of their staff. While they identified a number of challenges, they also felt that their libraries were fulfilling the initial aims of their

establishment – to pool resources to provide a good quality library service to their clientele. They achieved this with limited funds, but a willingness to negotiate and compromise.

A specific aim of my research was to gain an understanding of the factors which contribute to, or challenge, the successful operation of a joint use higher education library to inform future development of the written agreement governing my own library. As a result of this research, I have recommended that we include the following in our new activity schedule; a statement of partnership principles, a commitment to certain levels of funding, a commitment to collaborative decision making, consideration of shared staff development and regular evaluation of the joint use arrangement, as well as the effectiveness of the service to its diverse client base.

### **Recommendations for further study**

In this research, I explored the perceptions of two managers of existing joint use libraries. As the pool of university/TAFE libraries in Australia is so small, it would be desirable to interview all managers of those libraries to explore further what factors contribute to, or challenge, the successful operations of their joint use libraries and to determine whether any common key factors emerge.

As the quality of staff and of the manager was identified as important, it would be interesting to try and define what characteristics are desirable and provide guidelines to joint use libraries on recognising these qualities in new recruits and building on these qualities in existing staff.

As most joint use libraries are small and regional, they have a diminished capacity to offer staff development. Further research could also explore how joint use libraries identify what is needed to develop their staff and how they find the means to provide it. This would be useful not only for other joint use libraries but for any small library with limited funds.

Finally, the idea of documenting partnership principles in a written agreement could be further researched. Staff of existing joint use libraries could be surveyed to determine what principles they believe underpin their operations and to investigate whether these principles are documented anywhere. For the benefit of my own joint use library, I would like to have that conversation with my own staff and the key administrators of both institutions to define those principles to be recorded in our new activity schedule.

## Appendix A: Interview Schedule

### Interview Schedule

#### JOINT-USE ACADEMIC LIBRARIES

1. What is your position in the Library? How long have you been in this current position?
2. Describe how your joint use library works?  
[How long has this been a joint use library? Reasons the library became joint use? Kind of agreement? What is shared and not shared in the Library by each institute?]
3. What do you believe are the benefits of a joint use library?  
[What does the university gain from the joint use library? What does the TAFE gain?]
4. What aspects of the joint use partnership are most challenging?
5. What would you identify as the 3 most important factors in sustaining a successful joint use library?
6. There are relatively few joint use university/TAFE libraries in Australia. Why do you think that there are not more?
7. There are 5 areas which Alan Bundy, a leading expert on joint use libraries in Australia, argues must be addressed if the joint use partnership is to succeed. Please comment on the following in relation to joint use libraries, from your perspective;
  - a) Space and location
  - b) Staff (and Staff development)
  - c) Technology
  - d) Role of the governing board
  - e) Evaluation/review
8. What other aspects of a joint use service contributes to or challenges its successful operation?

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