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Libraries for the Blind in the  
Information Age  
Guidelines for Development

Edited by Rosemary Kavanagh and Beatrice Christensen Sköld

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## **PREFACE**

Visually impaired people have the same information needs as sighted people. Just as sighted people might read a newspaper, listen to a CD or download electronic information from the Internet, visually impaired people also want access to relevant information in their chosen accessible format.

Developing an efficient library service for print-disabled people is extremely important, because there are significantly fewer books available commercially in accessible formats compared to what is published in print for the general public. The need to build collections in alternative formats and make them available for readers who are unable to browse shelves makes it necessary to develop special services.

These guidelines were developed with input from many people from all over the world, including those who use libraries for the blind, work in them, or have a professional interest in the success of these libraries. The Standing Committee of the IFLA Libraries for the Blind Section wishes to acknowledge and thank all those who contributed. The following persons were primarily responsible for the preparation of these guidelines:

Rosemary Kavanagh, The Canadian National Institute for the Blind

Beatrice Christensen Sköld, Swedish Library of Talking Books and Braille



## 1. Introduction

### 1.1 Purpose of These Guidelines

The purpose of these guidelines is to provide libraries, governments, and other stakeholders with a framework for developing library services for people who are print disabled. Where appropriate the guidelines are supported by examples from many countries around the world.

For purposes of these guidelines, print disabled will be used to describe those who are unable to read print due to blindness, low vision, a learning disability, or a physical disability.

### 1.2 Changes in Library Service Development

In August 1983 the IFLA Libraries for the Blind Section (IFLA LBS) developed a set of recommendations on National Standards of Library Service for libraries for the blind.<sup>1</sup> Since then the Information Age has changed the way our services are organized and delivered. The transformation made possible by the synergy between information and information technology has made it possible for people who are print disabled to access more information in easier and faster ways. Print-disabled readers are more independent than ever, because they can choose the formats and sources of content they require in ways which were not possible before.

The result is that many libraries are increasingly converting their collections to digital holdings. A digital library can take many forms and be used in many ways, as evidenced by the National Digital Library Program of the Library of Congress:

“A physical library is more than a catalogue that points to volumes on shelves. A digital library is more than a database, and the future National Digital Library will be much more than a universal union catalogue. We envision the National Digital Library as a set of distributed repositories of managed content and a set of interfaces (some of which will resemble traditional catalogues) to that content. Some interfaces may offer comprehensive access to the entire resource, while others will be

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<sup>1</sup>International Federation of Library Associations, Section of Libraries for the Blind, *Approved Recommendations on Working Out National Standards of Library Service for the Blind*, ([place: IFLA, August 1983](#)) [page#](#).

specialized by content, by intended audience, or by primary purpose. Some interfaces will be closely tied to a particular repository, while others will provide access to a selection of content from distributed repositories... From the user's point of view, the digital library has the potential, in ways not yet realized and not possible with traditional library resources, to be an extension to every desktop, classroom, and personal library."<sup>2</sup>

Among the key corporate goals of the British Library's Strategic Plan 1999-2002 are that its library will

"Place a high priority on collecting digital materials and developing digital library services to ensure our users can consult new forms of publication, and can benefit from the new means of access available through digital and networking technologies... particular drivers for this priority are the development of new electronic forms of publishing and the increasing importance of information and communication technologies. The growing interest in library services for remote users has been fuelled by the rapid expansion of the Internet. The higher education sector is developing access to electronic publications, while publishers, telecommunications companies, and information providers have joined forces to explore new opportunities. All of these factors are forming a new environment in which the Library will work and which will develop the role of the British Library."<sup>3</sup>

In fact, all sectors of society have been impacted and transformed by new technological developments that have set new standards of service and made computer literacy imperative. Information technology is recognized as one of the most potent forces shaping the 21<sup>st</sup> century.

### **1.3 The Importance of Standards**

With these technological developments and the emergence of electronic publishing and digital libraries, it has become necessary to revise the first set of standards developed in 1983. While there are challenges to producing guidelines with universal relevance, we believe that these continue to be necessary for the development of library services for those who are print disabled.

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<sup>2</sup> "National Digital Library Program," Library of Congress, 1 July 2004  
<<http://memory.loc.gov/ammem/dli2/html/lcndlp.html>>

<sup>3</sup> The British Library, *Strategic Plan 1999-2002* (London: The British Library, [yearpublished](#)) 1999



Leading library service and standards organizations have made many statements regarding digital libraries, but these are often strong on technical standards but do not sufficiently address the need to keep digital libraries accessible for print-disabled users. The National Information Standards Organization (NISO) in the United States has recognized, however, that the goal of setting standards should be to make collections easier to access:

“The goal in using technical standards in information services, libraries, and publishing is to achieve compatibility and therefore interoperability between equipment, data, practices and procedures. Applying technical standards makes information services more accessible.”<sup>4</sup>

The library and information community has adopted a range of standards that facilitate the interchange of library data, promote the inter-operability of library systems, and support national and international networks of libraries. Adherence to standards plays an important role in improving access to the information resources in library collections, in cultural institutions, or on the World Wide Web. The website of the National Library of Australia reports that

“The National Library sees it as important to maintain a watching brief over national and international standards activities to ensure that the appropriate standards framework is in place or under development to support its business objectives.”<sup>5</sup>

In 1994, IFLA LBS endorsed the next generation of talking books (DAISY) and urged that international standards be adopted so that products or techniques in mainstream markets could be used for greater interoperability and information exchange. The intention was to reduce the cost and time involved in providing people who are print disabled with books and materials in an accessible format.

#### **1.4 Disparity of Resources**

In preparing these guidelines, much consideration was given to the fact that there is a vast disparity of resources between developing and developed countries. Many developing countries struggle to meet the

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<sup>4</sup> [www.niso.org](http://www.niso.org)

<sup>5</sup> “National Library Standards Activities,” The National Library of Australia Online, 1 July 2004 <[www.nla.gov.au/services/standards.html](http://www.nla.gov.au/services/standards.html)>

basic means of subsistence for their citizens, and are not able to provide any type of library, let alone a library for the blind.

The print-disabled populations of most countries are among the poorest of the poor. Yet clients of libraries for the blind need telecommunications and information technologies such as computers and talking book machines in order to read. Bridging the digital divide requires reliable phone lines, computers, modems, and a power supply. This essential infrastructure is the exception in developing countries. For example, only 4.78% of the world's population uses the Internet, and most of this use is concentrated in G8 countries. In Sweden and Canada, 73% of people use the Internet, but only 7% of people in China have that same ability.<sup>6</sup>

In addition, to foster braille literacy, trained instructors, expertise in braille standards, and basic materials such as paper and embossers are required.

These are enormous challenges in countries where the majority of people who are print disabled do not attend school. In these countries, poverty is so extreme that governments cannot provide for people with disabilities within their education or library programs. Many families choose to educate their able-bodied children rather than those who are disabled.

There is a further disparity at work. Libraries for the blind, even in relatively developed and prosperous nations, are under-developed compared to public libraries. Most provide access to less than 5% of the materials published in their country.

Nonetheless, it is our view that standards and guidelines provide benchmarks that libraries must strive to attain and therefore we do not believe it is appropriate to have separate guidelines for developed and developing countries. It is not expected that a library for the blind in any country will achieve or exceed all of these guidelines. Instead, we anticipate that this document will form the basis from which strong cases for good services will develop. We hope that, as a first step, these guidelines will raise awareness among professional librarians, library workers, clients, consumer groups, governments, and volunteers. We

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<sup>6</sup> There was a superscript number beside these statistics, but no footnote. There should be a source for these stats about Internet usage.

expect to create a common understanding that results in better library services for print-disabled people everywhere.

## 2. History

### 2.1 Libraries for the Blind

Free library service emerged over the last two centuries as a result of developments in Europe and North America, but the history of the library is as old as humanity's need to preserve its record and share its experiences.

Paralleling the development of libraries in civil society, libraries for the blind emerged to fulfil roles in education, training and lifelong learning for people unable to read print. In the middle of the 19<sup>th</sup> century, women philanthropists in Europe and the United States started doing charitable work for disabled people. Some of these women also founded library services for the blind. Female missionaries, who began distributing Bibles in accessible formats to spread Christianity, were primarily responsible for the founding of libraries for the blind in Asia and Africa. Many libraries for the blind grew out of rehabilitation agencies serving blind and visually impaired people, or as efforts to support the rehabilitation of blind war veterans.

In the United States, however, the government specifically acknowledged a responsibility for the training and education of its blind citizens in the early part of the 19<sup>th</sup> Century. The Library of Congress reports that “fifty-three years after the signing of the Declaration of Independence, this country's first public effort was made in training and educating blind persons. In 1829 the Massachusetts legislature passed the enabling legislation for the New England Asylum for the Blind, later to become the Perkins School for the Blind at Watertown, Massachusetts.”<sup>7</sup>

The April 1904 issue of *Public Libraries* revealed that 18 American public libraries were providing services for the blind. The American Library Association's Committee on Library Work with the Blind made its first report in 1906. The ultimate signing of a law to create a national service for people who are blind in the United States on March 3, 1931, was the result of cooperation between libraries and a blindness organization, the American Foundation for the Blind. These initiatives sprung out of the need to educate and train blind citizens and provide them with an

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<sup>7</sup> Eunice Lovejoy, “History and Standards,” in *That All May Read*, (Washington: Library of Congress, National Library Service for the Blind and Physically Handicapped, 1983) 1.

equitable library service. The establishment of the National Library Service for the Blind and Physically Handicapped (NLS BPH) recognized the need for a separate, national agency involving all levels of government, since public libraries could not support the national infrastructure required to create and distribute accessible content.

In other countries, the path of development was different. Libraries for the blind often developed outside of the mainstream library system as an extension of charitable agencies whose commitment to the rehabilitation of blind people included providing books they could read. For example, in Canada, Australia, and the United Kingdom there is no fully publicly funded national network equivalent to what exists in the United States, Denmark, or Sweden.

Today in the Information Age, the importance of intellectual capital and the role of libraries in transforming social and economic conditions are recognized in both developed and developing countries:

“In Uganda like many developing countries, the structural adjustment programs of the World Bank and International Monetary Fund are demanding drastic cuts in government expenditure. Yet on the other hand, the role of information as a national resource for socio-economic development appears to be gaining fairly wide recognition among government officials and decision makers.”<sup>8</sup>

“Since [the] 1980s, with the overall promotion of socialist modernization in China, great changes have taken place in Chinese public libraries... Public libraries at all levels regard serving national economic construction as the focal point of the work, further developing and enriching their original functions and roles. Practices demonstrate that public libraries can make great contributions to the development of national economy.”<sup>9</sup>

The G8 Finance Ministers of the wealthiest nations took this further, linking information technology to progress and modernization. They

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<sup>8</sup> Sarah Kagoda-Batuwa, “Free Versus Fee: The Challenge of Government Libraries in Uganda,” in *62nd IFLA General Conference Proceedings, August 25-31, 1996*, (place: IFLA, Librarian Economic Policy Research Centre, 1996) [page#](#). [www.ifla.org/IV/ifla62/62-kags.htm](http://www.ifla.org/IV/ifla62/62-kags.htm)

<sup>9</sup> Liu Xiaoqin, “Public Libraries and Economic Development in China,” in *62nd IFLA General Conference Proceedings, August 25-31, 1996*, (place: IFLA, Librarian Economic Policy Research Centre, 1996) [page#](#). [www.ifla.org/IV/ifla62/62-xial.htm](http://www.ifla.org/IV/ifla62/62-xial.htm)

prepared a report for their heads of states and governments, “The Okinawa Charter on the Global Information Society of the G8 Summit in Japan,” which stated: “The essence of the IT-driven economic and social transformation is its power to help individuals and societies to use knowledge and ideas.”<sup>10</sup>

This report further emphasized the importance of affordable access to technology and endorsed a commitment to IT literacy skills through education, lifelong learning, and training for all citizens, including those with a disability. The Charter promised to achieve these goals by getting schools, classrooms and libraries online and ensuring that teachers were knowledgeable about IT and multimedia resources.<sup>11</sup>

In 2000, the World Health Organization estimated that there are approximately 180 million people who are visually impaired worldwide, of which 40 to 45 million are blind. The majority (90%) of these people live in developing countries.<sup>12</sup> Globally this is a significant number, but regionally this represents a smaller, scattered population. As a result, many countries continue to identify the need for a centralized library and production system designed specifically to serve the needs of those who are print disabled. These libraries for the blind are the equivalent of a free public library service.

## **2.2 IFLA Libraries for the Blind Section (LBS)**

The IFLA LBS is one of 37 Sections of the International Federation of Library Associations (IFLA) representing over 135 countries in the world. Its major purpose is the development of library services for people who are print disabled worldwide.

The Section came into existence because of the lack of adequate professional training for those working in libraries for the blind and the need to exchange information and develop common standards. In 1977, a working group for the international coordination of library services for

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<sup>10</sup> Report from G8 Finance Ministers to the Heads of State and Government, “Okinawa Charter on the Global Information Society of the G8 Summit in Japan,” (Okinawa: Group of 8 Finance Ministers, July 22, 2000) [page#](#).  
[www.g8.utoronto.ca/summit/2000okinawa/gis.htm](http://www.g8.utoronto.ca/summit/2000okinawa/gis.htm)

<sup>11</sup> Ibid, [page#](#).

<sup>12</sup> “Blindness: Vision 2020 - The Global Initiative for the Elimination of Avoidable Blindness,” World Health Organization, 1 July 2004  
<[www.who.int/mediacentre/factsheets/fs213/en/](http://www.who.int/mediacentre/factsheets/fs213/en/)>

blind and physically disabled individuals was established under the IFLA Section of Libraries in Hospitals. The working group addressed the need for the following:

- An international inventory of alternative-format resources
- The identification of existing production formats
- The standardisation of these formats
- An effective international loan system
- A coordinated approach to applying technology to production requirements

In 1978, the newly formed Working Group of Libraries for the Blind presented a series of papers at the IFLA General Conference in Strbske Pleso, Czechoslovakia. Twenty-nine librarians from fourteen countries attended. A second conference took the mission further:

“If the Czechoslovakia conference proved to be the budding of a new idea, the 1979 conference in Copenhagen became the flowering of that idea. Ten papers were presented from six nations to an assembled audience of 85 participants from 28 countries.”<sup>13</sup>

With the success of these Conferences, the Working Group in 1979 received Round Table status. The Round Table focused attention on the needs of print-disabled persons within IFLA’s family of libraries and professionals. During the International Year for Disabled Persons (1981) the president of IFLA singled out the work of the Round Table in support of IFLA activities to bridge the gap for library services to disabled persons in general.

By 1982 the Round Table had outgrown its parent Section of Libraries in Hospitals, because it was in fact larger than the combined rest of the Section. It applied for its own Section status in order to achieve a higher profile and access to more funding for special projects. Full Section status was granted in 1983 and the Section launched its first Expert Meeting that year, three days prior to the IFLA Annual General Conference. This first meeting, held at the Deutsche Blindenstudienanstalt (BLISTA), would set the standard for future Expert Meetings.

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<sup>13</sup> Bruce Edward Massis, *Serving Print Disabled Library Patrons: A Textbook*, (North Carolina: McFarland & Company, Inc., 1996) [page#](#).

Over the next 24 years, the Section organized training workshops and meetings among experts from libraries for the blind and other disciplines. These meetings would address issues such as copyright and rights management, braille and audiobook production, library systems, and technologies.

Between 1981 and 2001 twelve Expert Meetings were held in conjunction with IFLA General Conferences in Germany, The Netherlands, Japan, the United Kingdom, Australia, France, Sweden, Spain, Turkey, Denmark, Malaysia and the United States. In addition, eight training sessions have been held in the United Kingdom, Kenya, Japan, India, Cuba, South Africa, and Greece. In 1995, the Expert Meeting in Istanbul provided a forum for discussion among libraries for the blind about the next generation of talking books. At its midwinter meeting in 1996 in Toronto, Canada, the Section formally endorsed its support of mainstream standards and digital technology for the next generation of library systems and services.

In 2003, the Section received a new name. It was changed from Section of Libraries for the Blind (SLB) to Libraries for the Blind Section (LBS). The change was made to maintain a consistent format in IFLA Section titles.

IFLA LBS has used working groups or issue-based groups on a variety of topics, such as collection development and resource sharing, copyright and rights management, library systems and technologies, management and strategic planning, and advocacy and marketing. These groups help to train librarians and focus discussion and direction at the international level on the issues that impact library service for people who are blind. Current information on IFLA LBS can be obtained on the IFLA website at [www.ifla.org/VII/s31/slb.htm](http://www.ifla.org/VII/s31/slb.htm).

The LBS does not implement systems or develop collections, as these are the responsibilities of member libraries. However, the Section is at the forefront of raising the issues that transform library services for print-disabled people. It creates forums for discussion and sets direction for both library service and staff development.



### **3. The Framework for Service**

The democratic right to access to information, continuous learning and culture extends to disabled persons. This section examines how governments and other stakeholders have provided guidelines, service models, or frameworks for an equitable library service.

For more information on IFLA's own statement about this democratic right, see Appendix 1, IFLA Declaration of Fundamental Right to Access and Express Information.

#### **3.1 Mission**

As a first step, governments or agencies should establish the mission of their library service for those who are print disabled. Libraries for the blind provide a service that parallels free public library service for the general population. Their mission and role is therefore no different than that defined for public libraries in the IFLA/UNESCO Public Library Manifesto:

“The public library, the local gateway to knowledge, provides a basic condition for lifelong learning, independent decision-making and cultural development of the individual and social groups...supporting both individual and self conducted education as well as formal education at all levels.”<sup>14</sup>

#### **3.2 Legal Framework**

##### **3.2.1 General**

The legislative basis for most national library services for print-disabled people comes from a variety of sources. Some countries have implemented legislation as part of a public library act, where law requires the public library service to include services to print-disabled people. Others have directly adopted UN resolutions and established systems and networks that may be publicly or privately funded. In a number of countries there is legislation against discrimination based on the extended United Nations' *Universal Declaration of Human Rights* and the implementation of the United Nations' *Standard Rules on the*

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<sup>14</sup> IFLA/UNESCO, *UNESCO Public Library Manifesto*, (The Hague: United Nations, 1994). [www.unesco.org/webworld/libraries/manifestos/libraman.html](http://www.unesco.org/webworld/libraries/manifestos/libraman.html)

*Equalization of Opportunities for People with Disabilities*, and this legislation becomes the basis for a library for the blind.

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**Australia:** The government implemented legislation against discrimination when the Australian Disability Act was passed in 1986.

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### **3.2.2 Library Legislation**

**Library services to print-disabled persons should be established by legislation. Legislation should identify the roles and responsibilities of levels of governments or appropriate authorities in the creation, acquisition, and distribution of accessible content and the integration of the service through mainstream library networks**

### **3.2.3 Copyright and Special Licenses**

Legislation granting copyright exceptions to ensure access to information should be implemented. Copyright laws protect the works of authors, translators, and publishers from being illegally copied. In a number of countries, copyright laws have exemptions for the transcription of literary works into braille, electronic text and talking books for use by people who are blind.<sup>15</sup> Usually these exceptions are limited to libraries for the blind and books or material produced may not be sold for commercial gain. In countries lacking such provisions, the producers of alternative-format material must establish agreements directly with copyright holders. Special licenses offer opportunities to build unique arrangements with publishers or copyright holders and may offer more opportunities for unique and necessary relationships in the provision of content. Mainstream libraries for example use special licenses to access electronic data bases and provide access for their users to many other sources of content. See Section 6.7

## **3.3 The Role of Government**

Many governments have signed and implemented the United Nation's "The Standard Rules on the Equalization of Opportunities for Persons with Disabilities." Rule 5, "Accessibility," in a section titled "Access to

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<sup>15</sup> David Mann, "Copyright Laws and the Rights of Blind People," Royal National Institute for the Blind, *New Beacon* 82/961, (February 1998).  
[www.rnib.org.uk/xpedio/groups/public/documents/visugate/public\\_nbfeb98.hcsp#P4\\_89](http://www.rnib.org.uk/xpedio/groups/public/documents/visugate/public_nbfeb98.hcsp#P4_89)

Information and Communication,” applies specifically to libraries:

“States should develop strategies to make information services and documentation accessible for different groups of persons with disabilities. Braille, tape services, large print and other appropriate technologies should be used to provide access to written information and documentation for people with visual impairments. Similarly, appropriate technologies should be used to provide access to spoken information for persons with auditory impairments or comprehension difficulties.”<sup>16</sup>

All governments should comply with this UN standard to establish a suitable infrastructure and funding for a library service for print-disabled individuals.

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**Denmark, Finland, and Sweden:** In these countries, library services for people who are print-disabled are guaranteed by specific legislation. Some of these countries include library services for print-disabled people in their cultural policy programs. The Swedish Act on Culture For All (1976) says that the state will ensure production of accessible material and the provision of library services to print-disabled people. In Finland, library service is guaranteed by the 1996 Act on the Library for the Visually Impaired.

**United States:** The Prater Smoot Act of Congress established library service for people who are blind or physically disabled in 1931. Although the resulting service is a department within the Library of Congress, it was identified and legislated separately.

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### 3.4 National Strategy

It is recommended that each country establish a national agency with the mandate to set standards and define, develop, and coordinate a national strategy for library services for people who are print disabled. The strategy should involve a nationwide network of all libraries and special agencies with expertise in services to print-disabled people. It also must embrace technology that can provide access to library services, including adaptive technology.

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<sup>16</sup> The United Nations, *The Standard Rules on the Equalization of Opportunities for Persons with Disabilities*, (The Hague: The United Nations General Assembly, forty-eighth session, December 20, 1993), resolution 48/96, annex.  
<http://www.un.org/esa/socdev/enable/dissre04.htm>

For example national coordination for public library type service is a necessity, as disabled populations are small and isolated and therefore require a specialized library service. Around the world these nationwide strategies are shaped in many ways and can be built with both public and private cooperation.

**National Strategies:** National coordination and standard setting is the primary responsibility of several charitably or publicly funded libraries in the world. Examples of publicly funded special libraries with national mandates are found in the United States, Sweden, The Netherlands, Denmark, Norway, and Kenya. Many of these libraries receive all or at least 70 to 80% of their funding from their governments. Examples of charitably funded national strategies are found in both developed and developing countries, such as Greece, Sub-Saharan Africa, and many other African countries. In some developed countries, private not-for-profit charities such as The Canadian National Institute for the Blind, The Royal National Institute for the Blind (U.K.) and the National Library for the Blind (U.K.) are the major providers of a national library. These organizations may receive 70% or more of their funding from charitable donations.

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**Trinidad and Tobago:** The National Library and Information Services (NALIS) has included the delivery of service to blind and visually impaired people as part of its national and regional library services.

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### **3.5 Public and Other Libraries**

Blind and print disabled people require access to public library type services for the general blind public in their communities which also interfaces with other types of libraries such as school or academic libraries. The roles of these community based library services should be developed in co-operation with other national and local agencies. The community based public library, for example, has the best opportunity to become a major access point for all print-disabled readers. All libraries should ensure that their collections and services complement and integrate with national agencies to provide access to as wide a range of materials and services as possible.

### 3.5.1 Public Library Legislation

Governments should ensure that legislation requires public libraries to provide a service that is accessible to all citizens, including those with disabilities. Each public library should develop a clear written policy on services to disabled people, including those who are print disabled. This policy will need to assess local needs, service developments required, and ways of delivering services in the most accessible way for all readers. Consultation and service planning should be undertaken in partnership with the print-disabled community.

Examples of public library legislation are available on the IFLA website at [www.ifla.org/V/cdoc/acts.htm](http://www.ifla.org/V/cdoc/acts.htm).

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**Canada:** The Visunet Canada Partners Program of The Canadian National Institute for the Blind (CNIB) is a program that permits public and educational libraries to use the CNIB's collection of alternative-format materials for an annual subscription fee, so that they may provide direct service to patrons in their community who have a print disability. The program aims to provide convenient access at the local level and to enrich the collections available to users in the communities in which they live.

**Sweden:** In Sweden, public and academic libraries are responsible for lending talking books to all print-disabled citizens. The Swedish Library of Talking Books and Braille (TPB) – a national agency – is responsible for production and cataloguing, as well as a complementary lending service.

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### 3.5.2 Needs Assessment

The public library will need to undertake an assessment of needs in cooperation with the print-disabled community. This will influence the design and layout of buildings and signs, stock levels and a development plan for alternative formats, the provision of adaptive equipment, and a promotional and reader development program.

**United States of America:** The Americans with Disabilities Act ([ADA](#)) provides accessibility guidelines for buildings and facilities, with a specific section on libraries, at [www.access-board.gov/adaag/html/adaag.htm](http://www.access-board.gov/adaag/html/adaag.htm).

### 3.5.3 Service Delivery in Public Libraries

Service delivery should take print-disabled readers' circumstances into account. Patrons may need transportation to reach the library, or services delivered through mobile libraries, home delivery, or postal services.

Staff should be trained to understand the range of needs and to offer appropriate assistance. The IFLA/UNESCO public library guidelines state that "The development of collections should be based on the principle of access for all and include access to formats appropriate to specific client groups, for example braille and talking books for blind people."<sup>17</sup>

According to Jean Machell:

"Information services increasingly rely on electronic modes of delivery. For visually impaired people, direction to accessible websites is vital, and provision must be made of equipment to enable speech or Braille output. This is particularly important in countries where people are unlikely to have access to equipment at home. Information about library services must be available in a range of formats, and electronic catalogues should be fully accessible...The ideal library service is one where each individual, regardless of the degree of visual impairment, has access to the materials and information at the time they are required, in a format that can be used, in the quantities that are needed, and where the needs of the user are understood by the staff."<sup>18</sup>

### 3.5.4 Management of Public Library Service

Libraries whose services are used by both the general public and print-disabled users, such as public or academic libraries have an important responsibility to ensure that they are accessible to all users and that appropriate policies and designs are developed as part of the core values of the organization. Management should strive for goals that establish equity of access as an underlying principle of service.

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<sup>17</sup> International Federation of Library Associations, *The Public Library Service: IFLA/UNESCO Guidelines for Development*, ed. for the Section of Public Libraries by Philip Gill et al. (Munich: Saur, 2001 XVI) 22-23. [www.ifla.org/VII/s8/proj/publ97.pdf](http://www.ifla.org/VII/s8/proj/publ97.pdf)

<sup>18</sup> Jean Machell, *Library and Information Services for Visually Impaired People: National Guidelines*, (London: Share the Vision/The Library Association, LA Publishing, 1996) [page#](#). <http://bpm.nlb-online.org/appendixa2.html>

“Managing library services for people with visual impairment is no different from good management in general: it simply recognises the importance of providing services for visually impaired people in the process. The manager must develop a clear policy or code of practice for disability provision with aims and objectives, strategic plans, procedures, and arrangements for allocating the necessary resources. This policy should include appropriate performance targets, monitoring procedures and accountability, and there should be effective processes for ensuring the quality of services. Promotion and partnerships are also important elements.”<sup>19</sup>

### **3.5.5 Access to Service Delivery in Educational Libraries**

Academic and school libraries must serve students at all education levels, from primary school to post-graduate. Students will need support with core curriculum materials, wider course reading, and research materials. Because there is no commercial publishing market for books for print-disabled students, these students will be heavily dependent on an effective library service with links to other libraries that can provide interlibrary loans.

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**USA:** Recording for the Blind & Dyslexic, a non-profit volunteer organization, serves people who cannot effectively read standard print because of a visual impairment, dyslexia, or a physical disability that prevents them from holding a book. It is a major provider of accessible educational materials within North America and around the world.

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Each academic institution should therefore have a policy to ensure that each print-disabled student’s needs are assessed and a plan is put together to ensure books are provided in the required formats. The objective should be to give students independent access to any materials they need. Every resource in a library needs to be targeted to this goal: “Managing integrated services for disabled students pervades all the resources the library manager controls – staff, money, automated systems, collections, IT, services and space.”<sup>20</sup>

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<sup>19</sup> Andrew McDonald, “Library Service Policy and Management,” in Linda Hopkins ed., *Library Services for Visually Impaired People: A Manual of Best Practice*, (London, The Council for Museums, Archives and Libraries, 2000) 6.1.3. <http://bpm.nlb-online.org/chapter6.html>

<sup>20</sup> Ibid 6.1.4.

Libraries need to ensure an established system is in place so that texts are made available in time for a print-disabled student to complete his course work. Personal reading services for the student may, in some cases, be the most appropriate means of ensuring timely availability of materials. A transcription service should also be available.

Digital sources of information are vital to students, and academic libraries will need to ensure that sufficient workstations are equipped with appropriate adaptive technology. Academic libraries should also be providing guidance about accessible websites that can be used for research.

Increasingly, students are participating in higher education programs by distance learning. Academic libraries must establish accessible postal and electronic services for these students to ensure that they are not disadvantaged and ensure that distance education programs meet standards of accessibility for equitable participation for disabled students.

For more information, see **4.3**, “Students.”



## 4. Customer Care: Meeting User Needs

### 4.1 General

Print-disabled users are a diverse community. Some are retired seniors; others are students or people employed in many different professions. Some may have multiple disabilities.

Libraries for the blind must meet the needs of this diverse community of print-disabled persons and provide services in all kinds of different institutions such as schools and homes for the elderly. The UNESCO Public Library Manifesto recognizes diversity as part of its service, and libraries for the blind should adopt an equally inclusive approach: “The services of the public library are provided on the basis of equality of access for all, regardless of age, race, sex, religion, nationality, language, or social status.”<sup>21</sup>

In the developed world, elderly people with low vision are the largest user group among people who are blind. However, it should be noted that adults and young people are often the most demanding users, because they are attending institutions of higher learning, working, or developing their careers. They often require books or information to support learning or professional needs. In the developing world, even more users fall into a younger age group, and are likely to need support for their education or work.

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**Canada:** Performance indicators from the CNIB have shown that clients below the age of 65 are the most demanding users. They are active in primary and secondary school, university or college, the workplace, or as professionals. They represent only 30% of the user population but use 70% of service hours and require more materials in alternative formats.

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### 4.2 Children

Print-disabled children have the same reading needs as other children. They require access to a range of reading experiences and opportunities for literacy.

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<sup>21</sup> IFLA/UNESCO, *UNESCO Public Library Manifesto*, (The Hague: United Nations, 1994). [www.unesco.org/webworld/libraries/manifestos/libraman.html](http://www.unesco.org/webworld/libraries/manifestos/libraman.html)

### **4.2.1 Reading Needs of Children**

Print-disabled children are at a disadvantage, because they do not have the ability to browse collections and select their own books. Parents, teachers, and librarians need to work together to help these children to develop a healthy appetite and curiosity for reading.

Lead by Kerstin Fellenius of the Stockholm Institute of Education is studying eight blind children supplied with braille, slates, and styluses at a very early age. The project, not yet complete, has shown so far that these children have the same reading skills as sighted children of the same age.

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User studies and research have shown that children exposed to braille at an early age, even if they cannot read it, develop stronger reading skills.<sup>22</sup> Studies also show that children who are blind like to choose their own books and will use several formats for reading.

### **4.2.3 Scope of Library Service**

Children will be learning and reading at home and at school, and a model that provides library services to children in schools best meets their needs.

Pre-schoolers, children, and youth need a broad range of literacy materials and activities, including braille, large print, tactile, and audio books. Simple tactile and multi-sensory materials and dual format books combining print and braille help young children to share books with adults and peers, and to learn about the connections between print, embossed braille, spoken language and story. Content should include fiction and non-fiction books. Older children, while benefiting from audio books, may also use both large print and braille for personal and educational reading.

Children require reference and information services in accessible formats and a catalogue they can use to make their own reading choices.

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<sup>22</sup> Kerstin Fellenius, *Reading Skills of the Visually Impaired, Experiences from Reading Training of Eight Pupils* (Stockholm: Stockholm Institute for Education Press, 1996) 89.

#### **4.2.4 Electronic Sources and Web-Based Services**

Children and young people are increasingly competent with electronic media. Electronic data transfer allows libraries to develop master copies of digital books and makes it possible for schools to download and transcribe texts into a desired format based on a child's need. Libraries should select accessible and appropriate websites as part of their services and provide links to other resources or activities that provide information, stimulate the imagination, and extend learning opportunities. For more information, see **6.12**, "Content from Websites."

#### **4.2.5 Reading Development Programs**

Reading development programs encourage children to develop an early interest in reading and sustain a lifelong interest in literature. Parents can also be encouraged to foster their child's reading development through these programs. Libraries for the blind have historically taken strong positions as advocates of braille literacy and have provided supporting programs to encourage strong braille writing and reading skills.

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**United Kingdom:** The National Library for the Blind's Fiction Café at [www.nlbuk.org](http://www.nlbuk.org) provides a menu of books for children categorised by reading preferences.

**Canada:** The CNIB Library for the Blind produces a bi-annual audio magazine for children called *Kidsworthy*. Each issue builds on a theme or topic with appropriate reading lists. *Kidsworthy* has a young client editor who conducts an interview with a children's author in each issue. The CNIB Library also runs a Braille Creative Writing and Accuracy Competition to encourage braille literacy and hosts a summer reading program. An online service called the Children's Discovery Portal provides a moderated chat, accessible games, and a wealth of age-appropriate information. ([www.cnib.ca/library](http://www.cnib.ca/library))

**Sweden:** The Swedish Library of Talking Books and Braille has an interactive website for children. The site includes a variety of accessible computer games. ([www.tpb.se/](http://www.tpb.se/))

**Netherlands:** In the Netherlands, there is a Kid's Corner on the FNB website. The site has interactive discussion groups about different subjects, stories and poems by children, children's authors as guests, computer and Internet usage tips, games, puzzles, and software. FNB

also publishes four audio magazines for children aged 6 to 12.  
(www.fnb.nl)

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### **4.3 Students**

Print-disabled students at school, college, or university have the same need for textbooks and supplementary reading material as those who read print, but face the continuous problem of not receiving material in time for course work and exams. As increasing numbers of people who are blind pursue life-long education, students will be depending more and more on a comprehensive library service to support learning trends including distance education. Students also need access to computers with adaptive technologies in school and community libraries in order to participate in the same learning process as their peers. Libraries should provide students who are print-disabled with training in the use of available resources for research.

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**Jamaica:** The computer-training laboratory for the Ministry of Labour is located at the Salvation Army School for the Blind, providing accessible workstations to students at the school when the laboratory is not in use by the government.

For more information, see **3.5.5**, “Access to Service Delivery in Educational Libraries.”

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### **4.4 Working Adults**

Print-disabled people in various professions need books and information to support continuous learning in the workplace and advance their careers. It is therefore important that libraries for the blind work with employers and instructors to support the professional requirements of working adults. It may be necessary to provide on-demand transcription or reading services for highly specialized content.

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**Canada:** The CNIB Library’s Information Resource Centre (IRC) and Service de recherche documentaire (SRD) provide reference and information services to all blind and visually impaired Canadians in both French and English. Reference information is transcribed for the user into his or her format of choice. Reference librarians work closely with other academic and public libraries to support the information and

reference needs of children, students, working-age adults, and seniors. Similar services are also available in other countries.

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#### 4.5 Multicultural Groups

Libraries should be able to serve print-disabled people from different cultural and linguistic backgrounds. Literature in other languages can often be obtained by interlibrary loan. If alternative-format materials are unavailable in a particular language, the national agency should arrange to provide such material by partnering with another organization.

The International Directory of Libraries for the Blind<sup>23</sup> prepared by the IFLA LBS is a helpful tool for locating a partner agency for an interlibrary loan arrangement. Libraries for the blind should cooperate by providing updated contact information for this resource. Some libraries for the blind maintain online public access catalogues that also include their multicultural holdings.

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**Sweden:** The Swedish Library of Talking books and Braille acts as a lending centre for books in many languages. In 2002, as many as 47 languages were represented in its collection of talking books.

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#### 4.6 Seniors

For many countries, the fastest growing population of users of libraries for the blind are seniors and older adults. Elderly people may want to read for leisure, for an interest or hobby, or for researching health or travel information. Some may have an interest in learning braille to foster their independence (by labelling drug prescription bottles, for example). Consequently, libraries should expect to develop programs that are targeted to support the literacy and reading interests of this group.

Many elderly people live in retirement or nursing homes and need a library service that works in cooperation with these organizations. Libraries for the blind should also be mindful that the next generation of seniors will have grown up in the Information Age and will be more familiar with a range of information technologies than the preceding generation of elderly blind users. Their expectations for information and

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<sup>23</sup> M. Nomura M. et al, eds, *International Directory of Libraries for the Blind*, 4<sup>th</sup> Edition, (The Hague: IFLA Headquarters, April 20, 2000). See <http://www.ifla.org/III/misc/4edition.htm> for more information.

service will be based on their own experiences with free public library services.

## 5. Cooperation and Networking

### 5.1 General

Although libraries for the blind are specialized, they do not fundamentally differ from other types of libraries. As information and documents are located all over the world, good libraries have always functioned as part of national and international networks. All libraries for the blind should be aware of collections held in other libraries and borrow less popular items from these sources. Good professionals need to maintain awareness of the copyright requirements and protocols for borrowing or lending materials to other libraries for the blind.

Libraries for the blind should support their work with direct links to specialized agencies (for example, rehabilitation agencies) serving those who are print disabled.

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**Canada:** The CNIB combines its library service with vision aids and rehabilitation teaching. This national service provides Canadians who are blind with access to both a collection developed by professional librarians and expert technical and vision aid training to help readers use this content.

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### 5.2 Sharing Resources and Expertise

Cooperation and the sharing of resources and expertise have been intrinsic to the development of library services for people who are print disabled. A cooperative approach is imperative for developing collections, embracing future technologies, and sharing resources.

International organizations such as IFLA LBS offer opportunities for these common links to be made.

**DAISY Consortium** (Digital Accessible Information System): DAISY developed from initiatives taken by the Swedish Library of Talking Books and Braille to create navigable content for students using digital audio files. The Consortium today has a membership of over 30 libraries for the blind in Europe, Asia, and North America, with DAISY software distributed in more than 100 countries. Such cooperation is vital for creating common standards, exchanging expertise, influencing vendors

and ensuring interoperability and content exchange among libraries for the blind.

### **5.2.1 Interlibrary Loan**

Lending between libraries has been a long-established practice and is a part of every effective library service. No library service can provide an absolutely sufficient range of subjects and number of titles and copies. Consequently, libraries function as part of a wider network providing many more books and subjects than a single community could afford. Interlibrary loans do not replace the need for strong local collections, but they do expand the collection available to readers.

While all libraries should provide an effective interlibrary loan system, it is particularly important, given the expense of creating and producing alternative-format materials, that libraries for the blind with small collections and limited resources seek materials on interlibrary loan. This should happen as a first step, unless heavy demand requires that a particular title should be produced and held locally.

### **5.2.3 Reducing Costs through Cooperation**

Many libraries purchase or locate alternative-format materials from other sources to avoid the costs of original production, which, as of 2004, can be as high as \$12,000 USD for a single book. Libraries should consult online catalogues and other relevant sources to see if a book can be found in an alternative format elsewhere before thinking about producing it for themselves. For example, libraries should not produce any of the classics, as these are often available on websites and in databases such as Project Gutenberg (<http://promo.net/pg/>). Keep in mind that content found on websites and databases still needs to be catalogued and classified by libraries that use the content.

Libraries should also thoroughly explore opportunities to participate in coordinated production. For example, portions of production could be shared between different institutions.

In developing countries, opportunities to work with other libraries or agencies are the key to reducing costs and creating service opportunities. Service support can be shared across a region, a number of countries, or within a national or public library. There are frequent examples of cooperation in many developing countries.



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**Jamaica:** The Jamaica Society for the Blind (JSB) and the Jamaica Library Service (JLS) work together to serve blind people across the island. JSB trains blind people and cooperates with JLS, which delivers talking books and braille books to readers through their parish libraries or a bookmobile service. In cooperation with the Rotary Club, the Kingston and St. Andrew branches of JLS have provided an adaptive workstation for blind users.

**Finland and Sweden:** The Celia Library in Finland, and The Swedish Library of Talking Books and Braille cooperate to avoid duplicating the production of Swedish literature in talking books or braille.

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### **5.3 Connection to other Libraries and Agencies**

An important task for a national agency is to create and sustain networks with public, academic, and school libraries. It is also necessary to accommodate external institutions such as homes for the elderly, resource centres for disabled people, schools, and nursing or retirement homes.

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**USA:** The Library of Congress, National Library Service for the Blind and Physically Handicapped, is built on a network of cooperating agencies at federal, state and municipal levels. The network includes public libraries and regional libraries for service delivery and distribution. The service is modelled on the premise of a free public library service.

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#### **5.3.1 Working with Blindness Agencies**

Agencies that provide or advocate for service to print-disabled people often conduct or assemble information on consumer demographics, needs, trends and behaviour. They are likely to be on top of the latest vision aids and technologies and are already providing training to clients or assisting in troubleshooting adaptive devices. Since many people who are blind use both a library service and the services of these agencies, there are substantial opportunities for partnership in supporting adaptive technologies and understanding consumer needs. Libraries for the blind should leverage these partnerships rather than duplicating services that are often quite costly to begin with.

## 6. Collection Development

### 6.1 General

A library's collection is the heart of its service and a reflection of its mission. Building a collection to meet the needs of a community requires consideration of its demographic, economic, cultural and racial diversity. People unable to read print due to a disability are a diverse clientele with the same reading needs as any other group. They require collections that include popular materials, information to support lifelong learning or course work, on-the-job educational resources, and books for all ages, including for children and youth. Jean L. Preer writes, "any collection is a dynamic organism, continually changing and growing. A well-selected item added to a collection enhances other items in that collection. An item is never an isolated work: it is related to others."<sup>24</sup>

Collections built for print-disabled readers should include an emphasis on health and vision-related information and represent national cultural collections (these are the books that will be difficult or impossible to get from other sources, since a nation is usually the expert in its own literature).

In the Information Age, the advent of the Internet and electronic publishing is changing the way in which collections are created, managed and accessed. Not all material or content for a collection needs to be located on shelves. Content can be housed remotely on Internet websites and in other digital libraries. The CNIB Library's requirements for a digital library point to the many possibilities for housing information:

"One of the most distinguishing characteristics of a digital library is in the nature of ... information existing not in a single physical location but in various places (not always evident to the user) and accessible through the use of widely available tools such as a Library's online catalogue as well as the variety of search engines available today on the Internet. This capability results in the creation of virtual collections, through the joining of similar resources distributed across a number of repositories,

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<sup>24</sup> Jean L. Preer, *Collection Building and the National Library Service for the Blind and Physically Handicapped*, (Washington: National Library Service for the Blind and Physically Handicapped, Library of Congress, September 21, 1994), 8.

which together combine into a resource far greater than the sum of its parts.”<sup>25</sup>

## 6.2 Collection Development Policy

A collection development policy, defining a strategy for building the collection and the library’s position on intellectual freedom, should be created and distributed to readers, staff and other stakeholders. The policy should be used to guide the selection, maintenance, and evaluation of content, regardless of its source or location, and give stakeholders an understanding of the scope of the collection. Many libraries do not have policies for developing collections for print-disabled people. A study in the United Kingdom observed that only 14.5% of libraries that responded to a survey had a written policy on the selection of materials.<sup>26</sup>

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**Sweden:** In 1981 the Swedish parliament passed a bill stating that 25% of books published in the country must be made available to print-disabled library patrons as talking books.

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## 6.3 Collection Development Plan

A collection development plan should identify over a minimum period (for example, three years) the title and copy goals for the overall collection on an annual basis. The plan should cover the subjects, formats, and special collections and areas that are to be developed, weeded, or replaced and the methods of archiving. The collection development plan should also state the type of service promised to clients over the minimum period identified. Everyone in the library should be aware of the collection goals to facilitate planning in other departments as well.

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<sup>25</sup> The CNIB Library for the Blind, *Digital Library Conversion: A Requirements Statement for the CNIB Library for the Blind*, (Toronto: The Canadian National Institute for the Blind, 1999), 6.

<sup>26</sup> Margaret Kinnell, et al, *Public Library Services for Visually Impaired People: Report to the Library and Information Commission*, (place: Library and Information Statistics Unit, Loughborough University, 2000) [page#](#).  
[www.mla.gov.uk/information/legacy/lic\\_pubs/executivesummaries/rr071.html](http://www.mla.gov.uk/information/legacy/lic_pubs/executivesummaries/rr071.html)

## 6.4 Selection Criteria

Each library should establish criteria for the selection of materials. These should reflect the needs of the community and be balanced to consider things like a wide range of subjects, recreational and information needs popular books, literary classics, and timely materials. The UNESCO Public Library Manifesto states that collections and services should not be subject to any ideological, political, or religious censorship or commercial pressures.<sup>27</sup>

A first and essential step is looking for other sources for titles selected for the collection. A title should never be produced without checking to see if it has been produced in the format required elsewhere. Duplication is costly for both the reader and the agency.

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**Canada and Sweden:** Both the CNIB Library for the Blind and the Swedish Library of Talking Books and Braille have identified savings of several million dollars by acquiring already produced or mastered titles.

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The selection criteria document should state that the selection of material should never reflect the views of the library or its board, staff or volunteers. The criteria should be supportive of intellectual freedom as endorsed by many professional library organizations including IFLA.

### 6.4.1 Published Works and Works of Enduring Value

Given the cost of creating content in alternative formats and the lack of these materials, preference should be given to published works and works of enduring value and recognized merit.

### 6.4.2 Consultation

The needs of readers should be primary. Reader requests should be routinely gathered and analysed when selecting material to be produced and added to the collection. Professional selection practices and tools should be used, such as consulting with other libraries, specialists, authors, or publishers and reading journals, periodicals, publishers' catalogues, and reviews.

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<sup>27</sup> IFLA/UNESCO, *UNESCO Public Library Manifesto*, (The Hague: United Nations, 1994). [www.unesco.org/webworld/libraries/manifestos/libraman.html](http://www.unesco.org/webworld/libraries/manifestos/libraman.html)

## 6.5 Balance and Scope

Barriers to accessible content are significant for people unable to read print due to a disability. In most developed countries only 3 to 5% of print material is available in an accessible format.<sup>28</sup> Libraries for the blind should strive to annually increase the number of new titles and books added to the collection in relation to the categories and subjects required to meet individual and community needs.

Books added to the collection should meet standards required for the general population. Therefore it is unacceptable to build a collection consisting primarily of abridged material if this is not the standard applied to the general population.

The reading requirements of print-disabled people are no different from the general population. They require books generally available in public libraries. While classic works of literature are important and readily available in electronic format, they are not necessarily desirable for readers wanting a public library-type collection. Consequently, libraries should include the transcription of popular content as part of the cost of acquiring and developing an accessible collection.

Formats such as braille, audio books, descriptive videos, electronic books, books that combine print and braille, and tactiles should reflect the needs of the community and the pressures or demands on the collection.

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**Canada:** The CNIB Library for the Blind offers recent, commercially published, unabridged books on CD or cassette to provide depth to its collections. Offering accessible commercial books gives clients more choice when these titles are so recent that libraries for the blind have not yet produced them in alternative formats.

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## 6.6 Copyright Clearance and Acknowledgement

Staff should be trained and familiar with copyright legislation and requirements. Libraries should develop procedures to secure copyright clearance before the release of the item in alternative format. Abuse of

copyright by a single library jeopardizes the ability of other libraries to obtain future permissions or concessions from rights holders.

### **6.7 Licenses**

In addition to copyright legislation, establishing special licensing arrangements with content providers and creators can provide advantages and increase content particularly in terms of electronic collections and databases. Staff with experience and competence in negotiating special arrangements should investigate opportunities for licensed access to content. Many examples of similar licensing arrangements exist in public and academic libraries.

### **6.8 Gifts and Donations**

Gifts and donations of materials from individuals, other libraries, or other sources are important in expanding a library's collection and giving breadth to its content, particularly when so little content is available to readers who are print disabled. However, a library has the right to refuse material it considers to be of no value to its readers. Before accepting donated material, the conditions of donation should be clearly determined. A library should always reserve the right to apply its collection development policy in evaluating, withdrawing, discarding or adding materials.

### **6.9 Material of Cultural or National Significance**

Every effort should be made to preserve content of national or cultural significance in alternative formats. A repository agreement with a national library service should be established to secure this content.

### **6.10 Organizing and Cataloguing Collections**

A library's collection, including websites and remote collections, should be organized and classified by subjects, categories, themes and formats. This catalogue should be available on the Internet for clients unable to visit the library so they can browse and select their books independently. An electronic catalogue is also essential to keep track of stock or inventory.

### **6.10.1 Bibliographic Standards**

Collections should be organized and catalogued according to accepted international or national bibliographic standards such as MARC. These standards not only permit inclusion in other catalogues but also permit the exchange of records between systems. Libraries without strong cataloguing skills should consider importing cataloguing records, many of which are available free of charge, by partnering with other major libraries to obtain cataloguing support.

### **6.10.2 National or Regional Union Catalogues**

A library for the blind should include its bibliographic records in a national or regional union catalogue where these are available. Publishing this information allows the library's holdings to be presented to a wider audience while providing convenient access wherever readers are located.

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**USA:** The Library of Congress has created a union catalogue for alternative-format holdings. Many major libraries for the blind are providing their records to this catalogue to facilitate interlibrary loans and information about content. IFLA has endorsed this catalogue and encouraged its members to add their holdings to it in order to create a single resource for all libraries for the blind. The catalogue is available on CD-ROM.

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### **6.10.3 Online Catalogue Access**

Online access is a spin-off of automated cataloguing systems. Many print-disabled users in the developed world are computer literate and are accustomed to receiving library services at home or at their place of business. Online catalogues allow users to browse independently using adaptive technology. This raises the level of service and provides greater satisfaction because of the direct link between the user and the collection.

## **6.11 Linking to Other Collections**

Building collections increasingly involves partnering with other libraries. The need for a variety of subjects and special collections (for example on blindness or braille music) and multilingual and multicultural requirements make other collections invaluable. Libraries for the blind

must position themselves to so they can link electronically to other libraries by standardizing the organization and cataloguing of bibliographic records.

### **6.12 Content from Websites**

The Internet offers accessible content in an array of subjects. However, electronic content from websites is not only vulnerable to alteration and misrepresentation, but also to complete inaccuracy. Electronic content selected to form part of a remote collection should be carefully screened before it is endorsed for the reader. Libraries building collections on the Internet need a trained professional on staff who is able to access and authenticate Web-based resources efficiently. Libraries should implement a process for reviewing links to Web-based resources on a regular basis, just as any physical holdings would regularly be developed or weeded.

### **6.13 Measurement Standards**

Not all standards for book collections apply to libraries for the blind. For example, libraries as a general guide use 1.5 to 2.5 copies per capita to determine the size of a book collection for a given community, as recommended in *The Public Library Service: IFLA/UNESCO Guidelines for Development*.<sup>29</sup> Among libraries for the blind, however, there are typically fewer titles and more copies. Therefore, using this standard may provide an inflated indicator of the comprehensiveness of the collection, especially considering that patrons of libraries for the blind have a greater need for library service – they read, on average, more than double the titles per year compared to the general public. Even among public libraries, smaller communities do not benefit from using this standard to provide them with enough choice and variety.

It is recommended that libraries for the blind set measures that are appropriate for their community. A factor to be considered is the growth rate of blind populations in developing and developed countries – the more this population grows, the more their need for a larger library collection. As mentioned previously, in 2000 the World Health Organization estimated that there are approximately 180 million visually

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<sup>29</sup> International Federation of Library Associations, *The Public Library Service: IFLA/UNESCO Guidelines for Development*, ed. for the Section of Public Libraries by Philip Gill et al. (Munich: Saur, 2001 XVI) 70. [www.ifla.org/VII/s8/proj/publ97.pdf](http://www.ifla.org/VII/s8/proj/publ97.pdf)



impaired persons in the world. The majority of these people live in developing countries.<sup>30</sup>

## **6.14 Collection Maintenance and Preservation**

Every library should have a frequently updated plan to preserve, store, weed and maintain its collections. Braille books need to be placed appropriately on a shelf to avoid flattening the embossed dots and or damaging the binding. Audio books on tape are subject to tape breakage or disintegration and have an average shelf life of five years. Shelves housing hardcopy braille or audio materials should be bolted to the floor for safety.

The electronic environment offers more flexibility in maintaining collections. For example, braille copies can be produced as needed from electronic masters rather than stored on a shelf.

Material discarded should be disposed of in a manner that prevents illicit duplication, sale, or abuse of copyright agreements.

### **6.14.1 Storage and Preservation**

Libraries should develop a preservation and storage plan based on accurate and up-to-date information. The plan should include guidelines for appropriate climatic storage. Research is necessary to find appropriate storage media (tapes, CD-ROMs or paper) that will endure over many years. The plan must ensure that the collection could be replaced in the event of a natural or other disaster. It should also ensure that as technology changes there is appropriate software and hardware to convert master collections.

### **6.14.2 Weeding Shelves**

Weeding is a process to regularly review the collection and remove books that no longer meet collection needs. Some libraries weed annually while others weed every three years. It is imperative that weeding practices should address:

- Titles and copies no longer in demand
- Outdated reference or non-fiction titles
- Availability of shelving and storage space

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<sup>30</sup> "Blindness: Vision 2020 - The Global Initiative for the Elimination of Avoidable Blindness," World Health Organization, 1 July 2004  
<[www.who.int/mediacentre/factsheets/fs213/en/](http://www.who.int/mediacentre/factsheets/fs213/en/)>

- Removal of cataloguing information so staff and patrons do not come across records for materials that have been weeded

#### **6.14.4 Digital Repositories and Archiving Systems**

As libraries for the blind develop digital content, they will need to establish the policies, strategies and systems that will support electronic repositories and archives. These should be developed in relation to the production and distribution strategies of the library and take into account the access and storage requirements for multi-media formats.

## **7. Access to Service and Collections**

### **7.1 General**

Libraries for the blind need to develop strong policies and procedures to ensure that clients can obtain information and leisure reading materials in the formats of their choice and choose the most efficient methods of delivery. Such policies should clearly set out the conditions of service for when and how borrowed materials are to be returned to the library.

Libraries should be aware of the variety of software and hardware solutions used by print-disabled people as they create and expand digital collections. Examples of such solutions include screen reading software, screen magnification software, soft or refreshable braille displays, and braille note takers. This is essential for designing networks and electronic delivery mechanisms. Staff should be competent in helping clients resolve technical problems.

Libraries should also consider access methods that are more widely available; the telephone and the computer are two good examples.

### **7.2 Playback Equipment and Access to the Service**

Libraries for the blind should provide simple but effective technologies tailored to their patrons' needs to ensure access to their collections. Playback devices and software programs should be provided without charge, and so included as part of a library's capital and operating budgets. Policies and procedures should be developed outlining ownership and the conditions under which this equipment will be provided, maintained, and replaced. Although comparisons are made to public libraries (which do not provide free equipment, for example CD players for patrons to view library videos), a majority of public library patrons are not print-disabled and do not require special access devices in order to read. However, more public libraries today are providing computer workstations and access devices on site. Some public libraries do provide equipment on loan.

Alternatively, a case can be made to seek or lobby for a government-funding program to accommodate the added expense of reading technologies for a person who is print-disabled.

### **7.3 Reader Training and Awareness**

Libraries need to develop a strategy for engaging readers and providing them with training. Training users in the use of new services and in new technologies that support these services is essential. Libraries should make users aware of new services or changes to existing services. Many libraries for the blind accomplish this through alternative-format newsletters or special training sessions. The Internet can also be an effective mechanism for introducing users to a new service and guiding them through it.

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**Zambia:** A computer and technology training centre opened in Zambia after the library there held a very successful workshop in basic computer skills for people who are blind. Called Touch for Progress, this initiative trains blind people in computer skills and complements other services offered by the library.

**Sweden:** The Open Media Open Learning program provides public library training on adaptive technology and the Internet to patrons with a print disability. A key success factor in this project was the recruitment of trainers with disabilities. Patrons responded well to peer training.

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### **7.4 Conditions of Use**

All materials distributed should indicate the conditions of use. For example, some talking books may indicate that only people with a print disability can use them.

#### **7.4.1 Electronic Content and Digital Rights**

Conditions for using electronic content and the owner of its digital rights should be made clear to those who access a digital service. As more libraries engage special licenses that permit the use of electronic files and content, it is essential that patrons are aware of these special licensing arrangements and any consequences if violated.

#### **7.4.2 Ensuring Protection of Electronic Assets**

Libraries should investigate levels of password protection or other rights management software solutions to ensure owners' rights are protected. Electronic content is especially vulnerable because of the ease of copying and distribution. In negotiating access arrangements and conditions with copyright owners, it is essential that the agreements

include clauses that protect the library and the copyright owners from inadvertent abuse. Libraries should seek the widest possible distribution rights in order to be able to share resources with other libraries that work in a common language while at the same time offering protection to rights holders. This will require all partners in the network to agree to the same standards for such an exchange.

## **7.5 Reader Services**

Many libraries have staff that is trained and familiar with its collections and sources of content. The unique requirements of a library for the blind means that staff should have access to the reading histories of library patrons in order to provide the best use of the collection to these readers. Staff should support the reading needs of patrons who call or write for their assistance in selecting materials. Staff should also be required to sign confidentiality agreements and to ensure the integrity and privacy of patron information. Some countries have developed ethical guidelines for professional librarians.

## **7.6 Methods of Delivery**

There are many opportunities for delivering books and information to people who are blind or visually impaired. Good libraries should remain aware of these opportunities, which are changing quite rapidly.

### **7.6.1 Free Postage**

Free Postage (Cecogramme) for the blind has been available for over a century and is a privilege supported by many countries through the Universal Postal Union. Libraries should ensure that they meet the definition of an institution serving the blind in order to benefit from this agreement. It is important that the custodians of library service do not abuse this privilege. Free postage is a fundamental necessity for libraries for the blind.

### **7.6.2 Mobile Libraries**

In many countries, arrangements can be made with other library services or other agencies to use their facilities for reaching clients in remote areas or simply to share some of the delivery costs. Mobile libraries can include everything from motorized vehicles to boats, mules and camels. It is possible to use a mobile library service as a means for training

people in remote areas on how to use computers and adaptive technology.<sup>31</sup>

### **7.6.3 Internet and Electronic Mail**

With the Information Age and the convergence of computers and telecommunications technologies, the Internet, Web-based systems and electronic mail offer opportunities to distribute content cheaply and efficiently across wide areas of the world. However, these depend on services such as telephones and electric systems being in place, and therefore may not be possible or reliable in every situation.

### **7.6.4 Telephone**

The telephone offers a good opportunity for patrons to connect to a library for selecting books and obtaining services. In some countries, the telephone is used to distribute newspapers and provide access to the catalogue for placing holds on material. Telephones can be a widely available form of technology that many print-disabled people are already familiar with, providing a possible alternative to computer access.

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**Israel:** The Centre for the Blind in Israel uses the telephone to allow patrons to select their own books and navigate through the catalogue.

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### **7.6.5 Networks, Libraries and Other Agencies**

The goal of a library for the blind should be to provide delivery in places users are most likely to gather. In some countries, the delivery of materials is arranged through public libraries as part of the delivery network or for special accommodations. Radio also offers a means for delivering audiobooks and information. At the local level, delivery of braille and talking books to nursing homes can be arranged through a public library or any organization that regularly visits. Blindness organizations are another place where people can collect or return library books.

## **7.7 Overdue Material**

A library's service is impacted if significant portions of its collections are

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<sup>31</sup> Robert Pestell, *Mobile Library Guidelines*, Professional Report #28, (The Hague: IFLA, Mobile Libraries Roundtable, 1991) [page#](#).

unavailable for use because patrons are holding items beyond due dates. While a majority of patrons are diligent in returning materials, outstanding books limit availability for others. It is important that patrons are notified about overdue materials and made to feel that their cooperation enhances the service for other readers. Libraries for the blind may want to offer a longer loan period if the majority of the collection is circulated through the mail.

## **8. Production of Alternative Formats**

### **8.1 General**

Libraries for the blind are the major producers of books, documents, and other content in formats that can be read by those who are print-disabled. Traditionally, audio and braille are the primary formats for books and magazines. Today, digital technologies and translation software programs allow multiple accessible formats (including braille, audio, electronic text, and large print) to be produced from a single "tagged" source file using a mark-up language such as XML.

### **8.2 Audio Production**

Centuries ago before any tactile reading system for people who are blind appeared, information was read aloud. Over time, recorded books and information became popular because they could be enjoyed independently and shared or loaned to others. For many years, audio production of books was the only way of accessing information for many blind people who had neither the opportunity to learn braille nor, in some cases, the ability. Audio recordings are still the most popular medium that most blind or visually impaired people use to read. These recordings are known worldwide as "talking books." Talking books have existed in many different formats through history, including cassette tapes and vinyl discs (records).

#### **8.2.2 Analogue Recording**

Over time, talking books have been recorded on both vinyl and tape, though tape became the more popular option, especially when compact cassettes appeared in the 1970s. The portability and robustness of compact cassettes together with easier recording techniques made this format the most widely used. The masters for these tapes were usually recorded in one of two ways:

- Two-Track (Two sides/normal speed): This format, which was used by the music industry, can be played on any standard tape player. The length of the final recording reflects the original length of the blank tape (60 minutes, 90 minutes, etc.).
- Four-Track (Four sides/half-speed): The Library of Congress in the United States introduced this format. Four-track recording uses



special equipment that operates at half the normal speed of standard recordings to create the masters. The normal duration of the tape is multiplied by four, reducing the space needed to store and package a book on cassette. This technology requires special equipment for production and playback. Copyright issues influenced the Library of Congress in deciding to adopt this special format, because it protects content from illegal copying and distribution.

### **8.2.3 Transformation to Digital Collections**

The analogue world is rapidly changing. Optical carriers such as CD-ROM and CD Audio are spreading very quickly. Longer durability, excellent sound quality, high portability, low price and high storage capacity are a few of the main assets with these mediums. The music industry's shift from analogue to digital has resulted in a change in the availability of analogue technology. Organizations and libraries serving print-disabled people are preparing for the transformation to digital technology.

Anticipating the demise of the analogue format, a number of libraries for the blind and other stakeholder organisations formed the DAISY Consortium to develop an international standard and software to produce talking books digitally. In the United States, the National Information Standards Organization (NISO) adopted DAISY standards. NISO is a non-profit organization accredited by the American National Standards Institute (ANSI), which develops and maintains information standards for publishing, technology, media, and library sectors. According to NISO:

“Information is the key ingredient for success in business and scholarship today and standards are the foundation of all information systems. Technical standards provide the infrastructure that makes information systems and databases less expensive to develop, easier to use, and universal in value.”<sup>32</sup>

The transformation to digital technology began in 1996, more than fifteen years after the birth of compact discs. A digital talking book in the DAISY format offers browsing capabilities to print-disabled users that are similar to those enjoyed when reading a book in print. “Navigation” is the term used most often in connection with DAISY books, meaning that readers

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<sup>32</sup> “About NISO,” National Information Standards Organization, 15 November 2001, 1 July 2004 <[www.niso.org/about/](http://www.niso.org/about/)>

can easily locate chapters and pages, place bookmarks and use and index. DAISY books usually have human-voice narration. These books can also contain the full text of the book being recorded, as well as images or other multimedia content, so that everything can be synchronized and enjoyed as a whole for a wider range of print-disabled users.

DAISY books use MP3 compression techniques so that a single compact disc is all that is required to store almost every book. DAISY books are played on special playback devices or computers that have DAISY software. Books in the DAISY format may be structured or unstructured (allowing lesser or greater levels of navigation). The decision on how much structure to provide is a question of balancing resources with user needs and is made by the producing library.

#### **8.2.4 Impact of Digital Audio on Library Services for Print-Disabled Users**

Digital audiobooks can be stored in many different ways, for example on servers or CD-ROM discs. From the original electronic and audio files, it is possible to produce many different formats, for example braille and electronic text. This allows libraries greater flexibility in how they produce, store and distribute their collections.

#### **8.2.5 The Transformation of Reading**

The transfer to digital talking books will set higher reader expectations for navigating books. Libraries for the blind need to establish internal standards for representing published works as digital audiobooks. Standards establish the levels of structure that will be used to make books and documents navigable. Therefore, libraries should develop standardized production plans for both materials that are being converted from analogue to digital and for future digital collections.

These standards ensure that future collections can meet reader expectations and allow print-disabled students, seniors, children or professionals to access information conveniently and effectively.

## 8.3 Braille Production

### 8.3.1 General

According to the IFLA Guidelines for Library Service to Braille Users, “Braille is the parallel to print as the reading medium for blind persons.”<sup>33</sup>

Braille is the only internationally recognized reading and writing system for blind and partially sighted people that has been approved by UNESCO. The ability to read and write independently has the same socio-economic benefits for blind people as literacy has for all people in civil society. Studies have shown that those who are able to read braille are most likely to attend university and to have higher rates of employment than those unable to do so.

The system was founded in 1825 by Louis Braille (1809-1852) who lived in France and was blinded himself as a child. Braille is a system of embossed or raised dots, with six dots per symbol in 63 different combinations with a blank cell providing a space:

#### The Braille Alphabet (English)

a	b	c	d	e	f	g	h	i	j	k	l	m
⠁	⠃	⠉	⠇	⠑	⠖	⠎	⠈	⠊	⠋	⠏	⠍	⠎
n	o	p	q	r	s	t	u	v	w	x	y	z
⠞	⠕	⠏	⠑	⠗	⠑	⠟	⠥	⠧	⠦	⠨	⠩	⠵

In many languages there are two types of braille — uncontracted (where each letter has a braille cell to represent it) and contracted (a format for compressing more writing on a single page). Some languages do not use contracted braille. The braille characters representing Latin letters were part of the original set of braille characters created by Louis Braille. Today, they are still common to various languages using the Latin alphabet. Letters with accents and other diacritical marks, as well as punctuation marks, are represented differently in various languages.

Several braille authorities exist nationally and internationally. The World Braille Foundation (which documents best practices for braille literacy) and the World Blind Union Literacy Committee are resources on braille

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<sup>33</sup> IFLA Section of Libraries for the Blind, *Guidelines for Library Service to Braille Users*, ([place](#): IFLA, August 1998). See Appendix B for these guidelines.

and music braille and can be contacted for further information and the latest developments.

In 1998, the IFLA LBS *Guidelines for Library Service to Braille Users* were approved by IFLA and endorsed by UNESCO. See Appendix 2 for the text of these guidelines.

### **8.3.2 Braille Production**

Before the advent of computers, braille was produced manually using hand frames, styluses, or braille typewriters. These processes were laborious and it could take many years to produce a print book in braille.

In the 1970s, computers and electronic embossing machines were introduced, making it much faster to produce a braille book and create multiple copies.

Today, most braille publications are created using translation software. Electronic text is automatically translated into the braille code, embossed on paper, and tagged or bound as required. Braille can now be proofread on screen or from an initial hardcopy. Electronic text is created by scanning a print book or by converting digital text files directly using a braille translation program.

### **8.3.3 Braille Paper**

Braille producers typically give considerable thought to the type of braille paper that will fit their needs. Paper is expensive in some countries and not easily obtained. Some embossers do not handle certain types of paper and some grades of paper do not bind well. Others may not have a long shelf life. A wide range of materials are used for hard copy braille production, such as manila, thermoform, or recycled paper as appropriate. In countries where paper is expensive and hard to obtain, recycled paper is an alternative which can be explored.

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**Nigeria:** The Nigerwives Braille Book Production Centre creates textbooks and other materials on waste paper originally used as annual report covers by large companies. Nigerwives use Everest Index embossers to braille on these recycled materials. In 1996 this organization received the Ulverscroft Munford Research

Award for their outstanding work transcribing textbooks for blind children.

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### **8.3.4 Archiving Braille Files**

Libraries for the blind must identify options for archiving digitally produced braille books, so they will be able to produce or replace future copies. If the final version of a file is saved, braille layout is preserved, allowing the later production of extra copies. However, if contracted and uncontracted braille might be requested, it is necessary to also store the electronic text version of the document. If the production is XML-based, storing one version of the file will enable the production of multiple formats, as demand requires.

### **8.3.5 Training and Certification of Braillists**

In order to produce correct braille, libraries must have braillists who are trained and certified. A trained braillist must know the rules of braille appropriate to the country and language and be aware of the appropriate braille authorities. Many libraries for the blind have training courses. In the United States and Canada it is possible to receive training and become a certified braillist through distance training courses. See [www.brl.org/formats](http://www.brl.org/formats) for more information.

### **8.3.6 Paperless Braille and Electronic Text**

With the dawn of the digital revolution, it is possible to have refreshable (also called soft) braille displays or keyboards. These might be portable devices or a keyboard attached to a computer, at a library workstation for example. This has greatly enhanced access to information by visually impaired computer users and offers an alternative to hardcopy braille.

## **8.4 Pictures and Graphics**

### **8.4.1 General**

Print books, especially schoolbooks, study materials, and user guides, tend to rely more and more on pictures, illustrations, diagrams and graphics. These illustrations are considered to be an important part of the learning and reading process. The text in children's books is often strengthened or clarified by illustrations. Diagrams and graphics add

information in many textbooks. A schematic drawing of a washing machine offers a quick understanding. Therefore it is important to transform pictures and graphics into an accessible format for readers who are print-disabled. One such format is a tactile graphic.

However, converting visual images into a tactile graphic involves adjusting details within the image, because complicated representations cannot be easily read tactually. People who are blind also need training in how to read and interpret tactile graphics.<sup>34</sup>

There are several techniques for making tactile graphics. In most libraries for the blind, one or more of the following methods are used:

- Swellpaper (micro capsule paper)
- Vacuum-formed (thermoform)
- Embossed (produced on a braille printer)
- Textile pictures

Illustrations and graphics can also be described in an audio format.

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**United Kingdom:** The National Centre for Tactile Diagrams, University of Hertfordshire, produces tactile material and trains and conducts research on tactile graphics. Please see [www.nctd.org.uk](http://www.nctd.org.uk).

**Netherlands:** In 2002, FNB produced 48,000 new tactile drawings to go along with braille textbooks, and reproduced 80,000 tactiles from their existing database.

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#### 8.4.2 Description

Description is the most cost-effective way of substituting graphical information in braille and talking books. When describing graphics, a standardized procedure that limits the description to the essential information is recommended.

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**Netherlands:** The Dutch Libraries for the Blind have produced guidelines on audio description, including general guidelines for

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<sup>34</sup> "What are Tactile Graphics?" National Centre for Tactile diagrams, 1 July 2004 <[www.nctd.org.uk/WhatareTGs.asp](http://www.nctd.org.uk/WhatareTGs.asp)>

diagrams, graphs and information technology. They are available on the FNB Website at <http://projects.fnb.nl/tedub>.

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### **8.4.3 Swellpaper**

Swellpaper is an inexpensive method of producing tactile pictures. The master drawing is produced on swellpaper either by hand or using a computer program such as Corel Draw, Illustrator or CAD-CAM. Swellpaper is coated paper that reacts to infrared heat. A sheet of swellpaper consists of two thin layers: one carrier layer (plain paper) and one swell layer. When heated the swell layer will rise a few millimetres. The dark ink parts attract more heat than the lighter surrounding parts and will swell into a tactile picture.

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**Sweden:** The Swedish Library of Talking Books and Braille has published a manual in English on design and production of graphics on swellpaper called *A Guide to the Production of Tactile Graphics on Swellpaper* that can be ordered from [info@tpb.se](mailto:info@tpb.se).

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### **8.4.4 Vacuum-formed Graphics (Thermoform)**

There are several methods of making vacuum-formed graphics. Thermoform is one of the most common ones, and requires a thermoform duplicator. This method is used for making two-dimensional pictures such as maps, and requires the creation of a mould. The mould is then covered in a sheet of plastic and heated to capture the picture in the plastic when it cools. Thermoform requires special equipment to protect staff from gases.

### **8.4.5 Embossed Graphics**

Embossed graphics are also known as braille graphics. These are images made up from dots and usually produced using a braille embosser. There are also embossers that are specially designed to produce graphics, which provide better results. Some braille software suppliers sell special images that can be imported into the braille translation software.

### **8.4.6 Collage Images**

Images in children's picture books can be made out of natural materials such as textiles, wood, sandpaper and leather. Natural materials help children to distinguish the different elements in an image. The base for collage images can either be handmade or cut out with a laser after

being made in a mould. The image can be fixed on cardboard, and pages with braille and large print can be added. Collage images also provide a way for parents or nursery schools to become involved with making books for small children.

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**Finland:** Some students in various Finnish colleges of handicraft and art make unique illustrated albums for young children who are blind and are customers of the Celia Library in Helsinki. As of 2002, the Celia Library has a collection of approximately 300 textile picture books. More information about making textile picture books can be obtained from [www.celialib.fi/letsmake.html](http://www.celialib.fi/letsmake.html).

**Sweden:** Since the mid-1990s, The Swedish Library of Talking Books and Braille has produced children's picture books with illustrations in various materials. The master pictures are drawn using software such as Corel Draw or Illustrator. Material is then chosen which is cut out with a laser and then pasted into a silkscreen printed book with the text in braille and large print.

**Europe:** Tactus, a European project, creates children's books with textile pictures in various materials. Each title is published in several European languages. Please see [www.tactus.org](http://www.tactus.org).

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## 8.5 Large Print

### 8.5.1 Need and Copyright

It is estimated that over 60% of clients who use libraries for the blind or the rehabilitation services of blindness agencies have some vision and are able to read large print.<sup>35</sup> With the aging of the population in many countries, demand for low vision services is expected to increase sharply. Many people enhance their residual vision by using magnifying devices or modified print and very often seek out rehabilitation agencies to help them select the best vision aids. These clients also use their public library's large print collections.

Unlike the production of talking books and braille, large print is excluded from any copyright exemptions. It is therefore important for libraries for

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<sup>35</sup> [Source?](#)



the blind to reach agreements with copyright holders to allow for the production of large print. However, not all large print material need to be produced in-house by a library or agency; often books can be acquired through interlibrary loan or cooperative arrangements with public libraries. See 5.3.1, “Connection to Expert Agencies.”

### **8.5.2 Enlargement**

The easiest way to enlarge print is to use an ordinary photocopying machine. However, with this method it is not easy to copy large amounts of text, such as entire books. It is best to limit material enlarged this way to ordinary offset prints and typed sheets.

In many countries, schools and libraries have collective agreements with copyright holders regarding photocopies that also apply to enlargement.

### **8.5.3 Electronic Text**

One way of producing enlarged text is to use electronic files and then print out the text in the desired typography. In most cases, 14 to 16 point is used, which is easily achieved with a word processor. Copyright has to be cleared if it is a protected text.

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### **8.5.4 Print on Demand**

Publishing on demand provides the best method of precisely matching a reader’s need with the right typography. The equipment for print on demand can easily be adjusted, offering the reader the precise typeface they prefer.

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**Belgium:** The Atelier Helen Keller makes large print textbooks on demand for school children in the typography deemed suitable for the child.

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### **8.5.5 Font Size and Type**

Preferences regarding font size and the colour of text and its background vary depending on someone’s specific sight condition. In many countries, production centres for large print recommend Arial or Verdana as a font. The size of the letters should not be larger than 16 points. People who need to read texts larger than 16 points are encouraged to use readings aids that further enlarge the text to suit

individual requirements. These aids can include special equipment such as a CCTVs or computer software programs that enlarge print.

Several projects around the world have addressed or are currently looking at standards for large print and appropriate fonts for low vision users.

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**USA:** Lighthouse International has published recommendations on reading and text legibility based on research it has done. Lighthouse has also published guidelines on color, contrast, typography, and font size. Please see [www.lighthouse.org/research\\_main.htm](http://www.lighthouse.org/research_main.htm).

**Europe:** The Tiresias project has made recommendations for large print and developed a special font that is easier for people with low vision to read. The font has been adapted for all European languages and can be obtained from [www.tiresias.org/fonts/index.htm](http://www.tiresias.org/fonts/index.htm).

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### **8.5.6 Commercial Publishers**

In the English-speaking world, there are many large print publishers who produce a significant numbers of titles annually. However, these books are mostly fiction and do not provide the range and depth of material suitable for a library collection that will meet the reading needs of a diverse print-disabled community. Consequently, libraries for the blind will need to consider the production of large print content to meet these needs.

## **9. Management and Marketing**

### **9.1 Employing the Right Skills**

#### **9.1.1 General**

Libraries for the blind require a wide range of skills for success and relationship building. Our organizations require experienced and well-trained managers and staff who are able to provide leadership and motivation in a rapidly changing environment of technology and service needs. A good knowledge of the business of librarianship and the needs of the users of this specialized service are required. Consequently, the staff complement should include support staff, professional librarians, paraprofessionals or technicians (in countries where this applies), and staff with unique specializations, for example children's and music librarians.

#### **9.1.2 Role of Professional Librarians**

Librarians are trained to understand the collection, organization and distribution of books and other content. They manage a wide variety of systems and tools. Their experience allows them to be familiar with many content sources, to recognize and authenticate reputable information, to understand networks and their operation, and to negotiate copyright and licensing arrangements.

Modern librarians possess considerable knowledge of information technologies and systems. This experience is usually acquired through professional training in librarianship or through equivalent experience. Many librarians manage very complex systems and multi-branch services with large budgets. The value of this experience and training should not be underestimated in planning the human resource complement of libraries for the blind.

Librarians who are professionally trained or have years of experience should be expected to perform some of the following at a management level:

- Provide leadership and motivation
- Develop effective relationships with governing and funding agencies
- Maintain knowledge of pertinent legislation including copyright and disability legislation
- Plan, develop, and implement policy

- Build and maintain networks with other organizations
- Negotiate financial and budgetary matters
- Manage library resources and staff
- Plan and develop library systems
- Manage adaptive technologies and user interfaces
- Manage change in a dynamic environment
- Facilitate marketing, promotion, advocacy and lobbying

### **9.1.3 Other Skills**

Other specialized skills required include skills in the management of

- Information systems
- Technical aids
- Narrators for audio production
- Braillists and tactilists
- Web development and electronic publishing

## **9.2 Training**

### **9.2.1 General**

Training should be one of the foremost goals in the development of staff. The most valuable resource in a library is its human capital. In these resources reside the skills, expertise, experience and history of an organization. Consequently, in addition to special courses and training in management and technical skills, in-house training and attendance at conferences both national and international is vital in the development of staff. Because libraries for the blind are usually national organizations, comparable experience and expertise are only available in international relations and activities.

### **9.2.2 Training and Staff Development**

A minimum of 1% of the total operating budget should be applied to staff development.

### **9.2.3 Role of Library Schools in Professional Development**

Library schools and professional associations should provide training about library services for print-disabled people to potential graduates and continuing education students working in such libraries. It is equally important that students and professionals are made aware of the

barriers that exclude disabled people from services. Instead of adopting the medical model (“What’s wrong with these people?”), library staff needs to be trained to adopt the social model (“How do we remove the barriers that prevent these people from using our services?”).

Social inclusion means that library service providers must identify the physical, sensory, cultural and psychological barriers that prevent or deter print-disabled people from using their services and take appropriate steps to remove or reduce them. Such understanding needs to function at all levels, particularly management.

Library schools should address issues facing print-disabled readers as part of the regular curriculum, as indicated at an IFLA workshop on the issue in 1993:

“When educating librarians, the library schools must give the students sufficient knowledge to be able to provide a professional service to the borrowers served by the library system. If the library system has a goal of serving all borrowers, also the handicapped ones, the students must learn how to do so. And in my opinion there is only one way of giving them background and that is by integrating knowledge of the specialised services in the ordinary curriculum. It is not at all sufficient to offer special courses for the few interested students. In that way the libraries will never be able to integrate all users and give them services on equal terms. All librarians must have a basic knowledge of the special needs of all users groups.”<sup>36</sup>

#### **9.2.4 Sensitivity Training for Disabilities**

Many libraries for the blind hire both sighted and visually impaired staff. Each library should foster sensitivity to blindness. Sighted staff and volunteers need to learn how to engage and work respectfully with blind staff and library patrons. This culture of awareness should start at the management level and become part of the values of the organization, as reinforced by the following activities:

- Sensitivity training
- Demonstrable management support
- Organizational values that are inclusive of all staff

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<sup>36</sup> Winnie Vitzansky, “Libraries For All: But Do Library Schools Educate the Librarians For All?” *Interaction Between Library Schools and Specialized Library Services* [workshop], IFLA General Conference and Council Meeting, (Barcelona: IFLA, 1993).

- Appropriate resource allocation for adaptive and other devices that make work possible for staff who are blind

The values of the library or organization should reflect an enlightened view of disability, emphasising that attitudes are often a much greater barrier than the physical problems faced by disabled persons.

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**Canada:** When new staff is oriented at the CNIB Library, they must sign confidentiality, ethics, and values agreements. Part of the orientation process includes sensitivity and sighted guide training. A resource for this can be found at [www.cnib.ca/eng/publications/pamphlets/when\\_you\\_meet.htm](http://www.cnib.ca/eng/publications/pamphlets/when_you_meet.htm).

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### 9.3 Ethics, Values and Awareness

It is vital that libraries develop ethical standards and values for dealing with patrons and make all staff aware of these standards. Staff should be sensitive to the needs of clients, to privacy issues and to the legislative obligations of the libraries they work for. Library staff should also be aware that print-disabled people have greatly reduced access to information compared to the sighted population. In industrialized countries, the majority of visually impaired people are elderly and require support as seniors in addition to support about blindness.

“Awareness raising of staff in libraries is fundamental for the direct improvement of services, and for the understanding of the importance of libraries in the process of change. At a more basic level, awareness raising of staff in libraries [is] also required in order to not breach anti-discrimination legislation and what might follow from that.”<sup>37</sup>

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<sup>37</sup> Susanne Bruhn, “The Road to Equity and Excellence: An Australian Experience in Establishing Staff Training in Library Services for People with Disabilities,” *Joint Workshop between Section of Education and Training, Section of Libraries Serving Disadvantaged People and Section of Libraries for the Blind*, (place: IFLA, August 26, 1993).

## **9.4 Recruitment and Training of Volunteers**

### **9.4.1 General**

In many countries, library services for people who are blind use volunteers as part of the human resource complement. The staff to volunteer ratio varies from situations in which there are ten staff for each volunteer to others where there are seven volunteers for every staff member.

The use of volunteers can be both a positive and negative statement about a community. On one hand, it endorses community values, where it is considered appropriate to donate time to improve the quality of life for others. On the other hand, it can be perceived as a way for societies to avoid funding services from the tax base. Some societies are too poor to have a tax base at all, and so volunteers are absolutely essential.

In some countries, the relationships established with volunteers are a critical public relations exercise given volunteer numbers and their range of deployment in an operation.

Whatever the philosophy behind the decision to use volunteers, they are no different from paid staff and should be expected to fulfil the aims and objectives of the operation. It is therefore necessary that good human resource skills be applied in the selection, recruitment, interviewing, and management of volunteers.

### **9.4.2 Recruitment**

Volunteers should be selected and recruited based on appropriate skills, made aware of the scope of the job, and asked to commit the time required by the library. All jobs assigned should have a job description. The library should have a good knowledge of each volunteer especially if he or she will be working with a patron. This process is no different than hiring paid staff. Some organizations require a criminal record check for volunteers.

### **9.4.3 Job Assignment**

The patron must always be the focus of library services. For example, volunteers must be assigned work in the area of greatest need, which will not necessarily be their preference. Work assigned such as braille transcription or talking book narration must be completed on time.

#### **9.4.4 Training and Rewarding Volunteers**

It is important to develop training programs for volunteers who are involved in either delivering service or producing content. Often volunteers will bring skills that can be shared with paid staff, but more often they require training to make an effective contribution. Training can be scheduled several times each year and include not only the specific techniques required but also attendance at conferences which broaden their scope and understanding of the work they do. A program for recognizing and rewarding volunteers should be developed and be sensitive to what would be considered appropriate by them. For example volunteers donating their time may consider some gifts extravagant.

#### **9.5 Health and Safety and Working Conditions**

The health and safety of staff and volunteers must be a priority, and good working conditions are an important factor in a positive and healthy working environment. The following should be kept in mind

- Risks to health and safety should be routinely identified and corrected.
- Ergonomically sound furniture and good working conditions should ensure that staff are productive and do not become injured because of poor facilities.
- Systems and workstations should be maintained and repaired within reasonable timeframes to maintain productivity and staff morale.
- Systems and workstations with any necessary adaptive technology products should be in place for new blind or visually impaired staff prior to their arrival. These systems should be maintained to the same standards that are provided for other staff in the operation.

#### **9.6 Operations and Planning**

##### **9.6.1 General**

Managers of libraries for the blind must have the capacity to translate user needs into a credible service plan and then act on it. Good leadership expands possibilities for print-disabled people and the organizations that serve them. Such leadership must advocate for the importance of library services for print-disabled users.



Leaders must also emphasize the importance of an organization's interconnectedness to other libraries and agencies that enhance its content and facilitate its service growth and development. Nationally, an organization must engage politicians and other stakeholders including print-disabled consumers. Internationally, a library for the blind should be in contact with organizations of and for the blind such as the World Blind Union, its affiliates, and other world bodies such as UNESCO.

### **9.6.2 Policy Development and Planning**

Policy development and planning exercises are fundamental to an operation and its clients, founders, stakeholders, and governing bodies. Both provide a statement on the service and its limitations and develop a road map to achieve common goals within the organization. Policies and plans should be developed and documented to clearly indicate the intent and purpose of the service. They should be made readily available to staff, patrons, volunteers, donors, and other stakeholders.

Policies are important statements of service possibilities and limitations that set parameters for staff and manage expectations for patrons.

### **9.6.3 Strategic and Operational Planning**

Planning should occur with those who most value the outcomes of the service and include short- and long-term goals, objectives, and performance measures.

Strategic plans should be:

- Preceded by a needs assessment review and an understanding of current achievements and the relevance of the present service.
- Clear about the plan's goals and objectives and the timelines for meeting them.
- Specific about the means that will be used to achieve goals, including budgetary, financial, capital, and human resource projections.
- Resilient, allowing for the reassessment of needs and priorities over the lifetime of the plan.
- Reviewed regularly and updated at an agreed-upon time frame
- Used to determine performance results according to appropriate measures. These results should form the basis for a board or governing body to evaluate management and staff .

An operational plan gives expression to the goals of the strategic plan by identifying available resources and achievable timelines, in other words, the processes needed to realize goals. It is the mechanism through which the strategic plan is adjusted in a given year.

#### **9.6.4 Financial Planning and Accountability**

A financial plan accompanies the strategic and operational plan and supports the goals and objectives of both. Forecasting exercises are necessary in the course of the year for planning outcomes and anticipating expenditures and potential deficits. Analysis of costs and plans for the renewal or maintenance of capital acquisitions, equipment, and facilities should be a continuous part of the financial plan. As the production of alternative-format reading materials is very expensive, the unit costs of several functions and activities should be routinely available and used to monitor cost trends.

#### **9.6.5 Budget Responsibilities**

It is imperative that staff is aware of their financial and budgeting responsibilities and held accountable for meeting budget goals and for all expenditures for which they are answerable. Expenditure approvals and appropriate systems for purchasing should be in place and approved by either the governing body or management as appropriate.

#### **9.6.6 Management of Relationships**

One of the key roles of managers in libraries for the blind is the cultivation and management of relationships with funding agencies, governing bodies, donors, foundations, or special organizations such as "Friends of the Library." In establishing and maintaining networks and cooperative relationships and alliances with local, national or international agencies, the manager is responsible for enhancing services and nurturing the positive reputation of the library.

#### **9.6.7 Management of Resources**

Libraries for the blind acquire and produce content, which can consume as much as 50% of their operating budgets. Staff and human resource costs can also represent more than 50% of a library's operating costs. Consequently, it is important that managers deploy these resources

effectively. Spending on library resources should be aligned with the operational plan and result in the overall effectiveness of the operation.

Some critical factors apply in any system:

- Procedures for recruitment of staff and volunteers should be clear and supported by an interview and a credible, fair, and transparent selection process; applicants should be aware of any equalisation or affirmative action plans.
- The role of every employee should be clearly defined and outlined.
- Internal communications should be effective and ensure that each staff member is well prepared with the tools and information needed for his or her job. Staff should also be aware of any new developments, and any policies, procedures, and legislative requirements that apply to their jobs and the operation.

## **9.7 Library Systems, Technologies and the Management of Change**

### **9.7.1 General**

Few libraries use the variety of technologies and range of systems that libraries for the blind have for the acquisition, production, and distribution of accessible content. Although this will vary with the size of library operations, the concept of an integrated digital library system has entered the lexicon of libraries for the blind. Our libraries now require numerous systems – circulation, cataloguing, acquisition, online access catalogues, and standard library service tracking and management systems – all customized to accommodate the special needs of patrons. When these can be integrated into one seamless whole, the operation can perform much more efficiently.

In addition, office applications such as word processing and spreadsheet programs, e-mail, and other communications tools form part of the systems infrastructure. To these will be added electronic production systems, mark up languages, special software for recording and managing digital audio materials, adaptive technologies (soft or refreshable braille devices, speech synthesizers, translation software), and production tracking systems. A new generation of electronic delivery, archiving, and repository systems are also being developed for multimedia resources. New developments in user interfaces covering a

number of different access methods for disabled users are also on the horizon.

### **9.7.2 Awareness of Technological Developments**

It is imperative that managers are aware of technological developments. Managers should be able to appropriately evaluate, select, acquire, and deploy potential new systems. Any new system selected should have the capacity to easily integrate into the infrastructure and staff members need to be fully trained in its use. Above all, any systems chosen should not place blind or visually impaired staff at a disadvantage or reduce their effectiveness on the job.

Technology convergence also promises adaptive technology products that are yet to be anticipated. For example, there are now mobile phones that employ personal digital assistants (PDAs) and screen reading software – a product that was barely conceived five years ago. See **9.7**, “Library Systems, Technologies and the Management of Change.”

### **9.7.3 Change Management**

Managers must be aware of the impact of change on an operation and its staff, patrons, and other resources. Shifting demographics, social and economic conditions, and the rapid development of technologies will necessarily impact libraries and change the way services are organized and managed. Change will be ongoing and continuous. Library management must develop the means to anticipate change and plan for its impact on both patrons and staff. In libraries for the blind where the majority of patrons are elderly but rely on technology to read, the ability to convey change in a positive way is very important. Libraries need to make sure patrons are comfortable with new systems and access technologies. ~~Library management must develop the means to anticipate change and plan for its impact on both patrons and staff.~~

### **9.7.4 Future Developments**

Managers are obligated to anticipate future developments and to ensure that their systems and services are prepared to address new changes and maintain their effectiveness. Trends should be understood and communicated to key bodies and staff in the operation and addressed in future planning exercises.

## 9.8 Analysis, Evaluation and Measurement

### 9.8.1 Needs Analysis and Monitoring

A key role of management is to conduct user needs analysis regularly to ensure the service is in line with what patrons need. Managers need to develop techniques to conduct needs assessments and user profiles and determine the appropriate frequency for using these techniques.

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**United Kingdom:** Share the Vision commissioned a survey of users, ex-users and non-users of all library services for visually impaired people.<sup>38</sup>

For more information, see

[www.lboro.ac.uk/departments/dils/lisu/public.html#stv2](http://www.lboro.ac.uk/departments/dils/lisu/public.html#stv2), which contains the full text survey and useful guidance on how to conduct a general survey of a representative sample of visually impaired people (in particular in Appendix 3, A Note on the Research Process).

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### 9.8.2 Monitoring Effectiveness

Along with assessing needs, your library service should be monitored for effectiveness on an ongoing basis to identify areas for improvement. Surveys are effective tools for gauging patron response, but anecdotal information from users is also valuable as an indication of new or growing problems and the need for the closer examination of a service. Statistics on collection use or other activities can reveal developing trends, and they should be rigorously collected and used consistently to maintain their reliability.

### 9.8.3 Performance Indicators

No operation can be successfully managed if its results cannot be measured. Collecting statistics related to resources, staffing, and activities is an essential activity for management. Statistics provide data for planning, a means of benchmarking service, and guidance for informed decision-making. In addition, they provide some point of reference for a comparative analysis with similar operations.

Some statistics are particularly valuable to support goals and objectives, solicit more funding, and identify user trends. For example:

- Titles and copies of books and magazines added to the collection annually

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<sup>38</sup> J.E. Davies et al, *Out of Sight But Not Out of Mind: Visually Impaired People's Perspectives of Library and Information Services*, (place: Library and Information Statistics Unit, Loughborough University, 2002) [page#](#).

- Items circulated annually
- Visits to websites
- Items sent out or received for interlibrary loan
- Total number of patrons
- Staff and volunteers as a ratio of population or target audience

## **9.9 Marketing and Advocacy**

### **9.9.1 General**

Print-disabled users are very often among the poorest of the poor in many countries, usually isolated from others with similar disabilities. Because the majority of people who are blind tend to be elderly, they are reliant on libraries for the blind to aggressively advocate on their behalf. In addition, special techniques are required to market to this group and to make them aware of library service opportunities. All staff should recognize their role and responsibility in promoting and advocating for the needs of these users. Marketing and advocacy initiatives must also engage a wide group of stakeholders, including other agencies and the general public who could support the work of the library.

Many potential users do not know about their rights or the possibility of using accessible-format material through libraries for the blind and similar agencies. Therefore, in each country, the national agency and the library community must market their services to

- Potential patrons
- Existing patrons
- Associations for people who are print disabled
- Blindness agencies
- Educators
- The commercial market (e.g. book publishers)
- Decision-makers and government officials

### **9.9.2 Marketing and Promotions Policy**

Each library should have a written communications, marketing, and promotion plan to guide how it publicizes its services. The plan should include methods of evaluating promotional programs. Points to consider when creating a communications/marketing plan:

- Strategies for reaching target audiences in appropriate formats

- Ways of targeting politicians, educators, librarians, community leaders, and industry and technology developers and leaders
- Marketing through other agencies and partners
- Promoting your organization through the media
- Involving patrons as champions of their own needs
- Successful role models
- Addressing patron concerns
- Measures for evaluating the success of communication strategies
- Tools for regular communications with patrons, for example braille, electronic text, and audio newsletters that promote your library service

### **9.9.3 Working with the Media**

Library staff should be trained to appropriately promote your library's service when responding to media enquires. It is a good idea to have at least one person designated for media relations, so that your strategy will be coordinated and handled consistently through this one individual. Your communications/media relations contact(s) should be able to write media materials such as press releases. They should be familiar with techniques for speaking with the media and being interviewed on radio, in print, and on television. They should also be able to promote your services via computer and telecommunications networks including the creation of library websites. Finally, they should be able to identify and train patrons and other spokespeople to speak to the media.

When marketing library services for people who are print-disabled, it is valuable to cooperate with consumer organizations. These organizations usually have different means of communicating with their members (for example, newsletters and websites), which can be used as channels for information from your library.

### **9.9.4 Participation in Community Life**

One of the most effective promotional strategies is the participation of well-informed library staff and committee or board members in community activities. Examples include membership in

- Charitable organizations
- Pertinent professional organizations
- Blindness organizations
- Consumer groups
- Umbrella associations and advocacy groups

### **9.9.5 Evaluation**

Your organization should carry out a regular evaluation of its marketing and promotion programs and ensure that the results of each evaluation are taken into account when planning future programs.



## 10. Quality Assurance

Library management should establish a model for ensuring a high quality of services to print-disabled patrons that is consistent with your approach to quality assurance in general. It is vital to consult patrons and involve them in the process. Operational guidelines are important so that all staff members in the library know what is expected and how they can maximize the support available. While it is important to have mechanisms in place to get feedback from patrons, it is even more important to listen to the issues raised and take appropriate actions in response to the feedback. Accessibility of service should be a core feature of libraries upon which their performance is judged – it should not be regarded as an optional extra.

The quality assurance model should include:

- Liaison and communication
- Service levels or standards
- Performance indicators
- Monitoring
- Accountability
- Feedback from customers
- User forums
- Questionnaires
- Performance assessment
- Response to complaints in an appropriate format
- Benchmarking

## GLOSSARY

**academic library** Any library that supports students, whether at the primary, secondary, post-secondary, or post-doctoral level.

**accessible website** A website that works well with adaptive technology equipment, so that it can be used by people who are print-disabled.

**adaptive/accessible technology** Technological equipment or systems that increase, maintain, or improve the functional capabilities of a person who is disabled. Also acceptable: access technology, access devices, adaptive devices. Examples of adaptive technology include refreshable (or soft) braille displays, screen-reading software, and screen-magnifying software.

**advocacy** Public and often organized support or lobbying for an idea, development, or way of doing something, for example for disability rights or specific legislation.

**alternative/accessible format** A format that conveys visual information to a person who is print disabled. Some examples are braille, audio, large print, descriptive videos, and electronic text.

**analogue recording** A recording method that uses analogue (non-digital) technology. Analogue recording uses signals corresponding to physical criteria, such as the magnetic particles on a cassette tape or the grooves on a vinyl record.

**audiobooks** A narrated book in an audio format, such as on CD or cassette. An audiobook may be commercial or non-commercial, and abridged or unabridged. Non-commercial, unabridged books created specifically for print-disabled readers are usually called talking books.

**bibliographic standards** Standards for organizing and cataloguing books and other library resources. These standards allow libraries to organize collections and share records between systems. An example of a bibliographic standard is MARC.

**braille** [noun] a tactile system of reading and writing used instead of the printed alphabet by people who are blind or visually impaired. In braille, groups or “cells” of six raised dots represent letters, numbers,

punctuation, contractions, and commonly used words. **braille** [verb] to transcribe written material into braille.

**braille embosser** A machine connected to a computer that produces hard-copy braille; a printer for braille.

**braille literacy** The ability to read and write braille. For people who cannot read print because of blindness, braille is the only way to obtain literacy skills such as spelling, grammar, and punctuation.

**braille notetaker, braille notetaking device** A portable, electronic device with six keys used to enter and store braille text. Output methods may include downloads to computers or built-in speech synthesizers and refreshable (soft) braille keyboards.

**braille proofreader** A person who compares a braille text to its print counterpart to check for any errors that may have occurred during translation.

**braille translation software, braille translation program** A computer program that converts electronic text to electronic braille and vice versa. One popular program is the Duxbury Braille Translator (DBT). ([www.duxburysystems.com](http://www.duxburysystems.com))

**brailist, braille transcriber** A person who translates print into braille using either a manual device such as a Perkins Brailler (a typewriter for braille) or braille translation software.

**CCTV (closed-circuit television)** A system that uses a stand-mounted or hand-held video camera to project a magnified image onto a video monitor, television screen, or computer monitor. CCTVs can be used by people who have low or partial vision to enlarge hardcopy print text such as the pages of a book or document.

**collage images** Images, usually in children's picture books, that are made out of natural materials such as textiles, wood, sandpaper and leather to provide a tactile sense of the objects represented.

**collection development (policy and plan)** A collection development **policy** is a document that guides the selection, maintenance, and evaluation of content for building a library's collection. A collection development **plan** identifies more specifically how the policy will be put

into action on a year-by-year basis by identifying goals and the steps to achieve them. A collection development plan might cover acquisition, weeding, subject area development, and service delivery goals, for example.

**copyright** The legal right granted to an author, composer, playwright, publisher, or distributor to exclusive publication, production, sale, or distribution of a literary, musical, dramatic, or artistic work.

**DAISY (Digital Accessible Information SYstem)** A set of standards and software developed by the international DAISY Consortium for recording digital, human-voice talking books designed specifically for people who are print disabled. (For more information, see [www.daisy.org](http://www.daisy.org)). DAISY books can be read on a digital talking-book player or using software packages.

**description** The process of narrating visual information to make it accessible for someone who is print disabled. For example, in creating an alternative-format version of a textbook, key graphics, maps, or illustrations may be described in an audio format to provide the student with all of the necessary information.

**descriptive (or described) videos** Video recordings (usually movies or television programs) that contain added narration describing setting and actions between dialogue sequences.

**digital rights management** The process of ensuring that the rights of a copyright holder are protected when the content in question is in a digital form. Electronic content is especially vulnerable to copyright violation because of the ease of copying and distribution. Digital rights management may involve the use of password protection, encryption, or other software solutions to ensure owners' rights are protected.

**digital repositories/archives/collections** Any information that is stored in a digital or electronic format. This could include books, magazines, or newspapers (in electronic braille or text formats) sound or video files (for example, streamed talking books), or commercial databases such as encyclopedias.

**digital talking-book machine, digital talking-book player** A talking-book machine that uses digital (binary) technology and has many advantages for a user who is print disabled, as a result of the fact that

the human narration has been synchronized to digital text. Digital talking books can be easily navigated and allow for features such as bookmarks and indexing.

**electronic braille, e-braille** Braille in its digital format. Electronic braille appears on a computer screen as braille dots and may also be read using a refreshable braille keyboard or a braille notetaking device.

**electronic text, e-text** Print in a digital format, such as ASCII. Electronic text can be read by people who are print disabled using methods such as screen-reading software or screen-magnification software.

**electronic books** Books in a digital format, such as electronic text or electronic braille.

**embossing** Producing hard-copy braille. Raised dots are produced on paper manually using a slate and stylus, or using a braille typewriter or computer printer.

**interlibrary loan (ILL)** A cooperative arrangement between libraries, where users can borrow items from other libraries within the system.

**IT** Information technology; computer systems and software applications.

**large print** Text that is printed larger than the standard print size used by sighted people so that it can be read by someone who has low vision. In most cases, 14 to 16 point text is used; low vision readers may use additional vision aids to enlarge the text further as required.

**low vision** Difficulty recognizing a face across the street or reading a menu in a restaurant. Low vision cannot be corrected with regular glasses, contact lenses, medication, or surgery. Another term for visual impairment.

**magnification software** See screen-magnification software.

**MARC** Machine-Readable Cataloging. An international, standardized format for computerized bibliographic data developed by the Library of Congress to simplify the exchange of catalogue records.

**measurement standards** Quantitative standards that act as guidelines in building a library collection. For example, one standard suggests that there should be 1.5 to 2.5 books per capita to determine the size of a collection for a given community. Measurement standards may need to be adjusted to account for the unique needs and circumstances at libraries for the blind.

**mobile libraries** A library outreach service where books travel to patrons, especially to those in remote areas or to patrons who would otherwise have a hard time visiting a library. Mobile libraries can use everything from motorized vehicles to boats, mules and camels.

**narrator** A person who reads books or documents out loud so that they can be recorded and made available in an audio format.

**paraprofessionals** Trained library staff or technicians who support professional librarians by performing high-level technical work like cataloguing and serials control.

**PDA** Personal digital assistant. A lightweight, portable computer used as a personal organizer.

**performance indicators** Measures of how well an organization is meeting its goals, for example, the percentage of newly selected books that are successfully transcribed into alternative formats and made available to patrons within a certain time limit.

**playback equipment** A device for playing an audiobook, for example a CD player, a cassette player, or a digital talking book player or software package.

**print-disabled** A term referring to anyone who has difficulty reading print. This can be because of a physical disability that makes it impossible to hold a book, because of a perceptual or learning disability such as dyslexia, or because of blindness or visual impairment. Hyphenated before the noun it describes, but not after a linking verb.

**print-on-demand** The ability to create a book when and if it is needed by a reader.

**quality assurance** A process of ensuring that the services provided by a library have met the needs of its patrons and the standards of the

profession. Quality assurance is judged based on statistics and other performance indicators such as qualitative feedback from patrons, staff, and volunteers.

**reader services** Services provided by trained staff who specialize in meeting the reading needs of patrons. Reader services staff are collection experts and answer questions about a library's resources and services as well as recommending specific titles and authors, often based on a knowledge of a patron's past reading preferences.

**refreshable braille displays/keyboards** A device that is used to read electronic braille. The keyboard displays braille cells via small, raised pins that change to represent what is being typed or read. A refreshable braille keyboard may be attached to a computer (to display in braille whatever text is being read or written) or built-in to a braille notetaking device. Also known as soft braille displays or keyboards.

**repository agreement** A written statement from a public library agreeing to serve as a repository to preserve materials of national or cultural significance.

**screen-magnification software** A program that magnifies what is displayed on a computer monitor for the benefit of a reader who has low vision. The reader may change the degree of magnification and set other preferences according to his or her needs.

**screen-reading software** A program that describes, using synthetic speech, the contents of a computer screen for the benefit of someone who is print disabled. One popular application is called JAWS for Windows. Screen-reading software can be manipulated to jump around a screen and to "read" a screen in whatever way the user requires.

**selection criteria** The set of standards used by a library to decide whether or not to include materials in the collection. Criteria might be based on subjects to be targeted, formats required, languages the collection should reflect, patron age-groups, and so on.

soft braille displays/keyboards See refreshable braille displays/keyboards.

**swellpaper** Coated paper consisting of two thin layers, a carrier layer (plain paper) and a swell layer that reacts to infrared heat. Master drawings are produced on the paper either by hand or using a computer

program such as Corel Draw, Illustrator or CAD-CAM. When heated, the dark ink parts attract more heat than the lighter surrounding parts and the swell layer will rise by a few inches, creating a tactile picture.

**tactile (tactile graphic)** A three-dimensional image created using materials of different sizes and textures and then copied using a thermoform process. Tactiles can represent maps, charts, diagrams, or illustrations and are often bound into braille books or accompany audio recordings. Because “tactile,” used as an adjective, has a commonly understood definition (“of or connected with the sense of touch”), care should be taken to make the meaning of “tactile” as a noun referring to these three-dimensional images clear by using supporting words and phrases.

**talking book** An unabridged audiobook that is specifically designed for use by people who are print disabled.

**talking-book machine, talking-book player** A portable machine for playing a talking book.

**transcription** The process of translating any written work into an alternative format.

**unabridged** A book in its complete, full-text form, as opposed to an abridged book, which has been shortened.

**union catalogue** A catalogue for an entire library system or group of cooperating libraries.

**Universal Postal Union (UPU)** An international organization that provides a forum for cooperation between postal services in 189 member countries. The UPU fulfils an advisory, mediating and liaison role, and renders technical assistance where needed. It sets the rules for international mail exchanges and makes recommendations to improve the quality of service for customers. The UPU provides Free Postage (Cecogramme) for materials in restricted formats for people who are blind or visually impaired.

**vision aids** Any device that helps someone who is visually impaired to maximize his or her remaining vision, for example, CCTVs and hand-held magnifiers.



**weeding** A process to regularly review a library collection and remove books that no longer meet collection needs because they are out of date or no longer in demand.

## **APPENDIX 1: IFLA Declaration of Fundamental Right to Access and Express Information**

### **Meeting in Glasgow on the occasion of the 75th anniversary of its formation, IFLA declares that:**

IFLA proclaims the fundamental right of human beings both to access and to express information without restriction.

IFLA and its worldwide membership support, defend and promote intellectual freedom as expressed in the United Nations Universal Declaration of Human Rights. This intellectual freedom encompasses the wealth of human knowledge, opinion, creative thought and intellectual activity.

IFLA asserts that a commitment to intellectual freedom is a core responsibility of the library and information profession worldwide, expressed through codes of ethics and demonstrated through practice.

### **IFLA affirms that:**

- Libraries and information services provide access to information, ideas and works of imagination in any medium and regardless of frontiers. They serve as gateways to knowledge, thought and culture, offering essential support for independent decision-making, cultural development, research and lifelong learning by both individuals and groups.
- Libraries and information services contribute to the development and maintenance of intellectual freedom and help to safeguard democratic values and universal civil rights. Consequently, they are committed to offering their clients access to relevant resources and services without restriction and to opposing any form of censorship.
- Libraries and information services shall acquire, preserve and make available the widest variety of materials, reflecting the plurality and diversity of society. The selection and availability of library materials and services shall be governed by professional considerations and not by political, moral and religious views.
- Libraries and information services shall make materials, facilities and services equally accessible to all users. There shall be no

discrimination for any reason including race, national or ethnic origin, gender or sexual preference, age, disability, religion, or political beliefs.

- Libraries and information services shall protect each user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted.

IFLA therefore calls upon libraries and information services and their staff to uphold and promote the principles of intellectual freedom and to provide uninhibited access to information.

## **APPENDIX 2: Guidelines for Library Service to Braille Users**

### **Background**

In November 1994 the Intergovernmental Council of the UNESCO General Information Program approved the new revised text of the UNESCO Manifesto for Public Libraries. The Manifesto was developed in co-operation with the International Federation of Library Associations (IFLA) Section of Public Libraries. The Manifesto proclaims two significant statements:

“The Public Library, the local gateway to knowledge, provides a basic condition for lifelong learning, independent decision-making and cultural development of the individual and social groups.

This Manifesto proclaims UNESCO’s beliefs in the public library as a living force for education, culture and information, and as an essential agent for the fostering of peace and spiritual welfare through the minds of men and women.

The services of the public library are provided on the basis of equality of access for all... specific services and materials must be provided for those users who cannot, for whatever reason, use the regular services and materials, for example linguistic minorities, people with disabilities or people in hospital or prison.”<sup>1</sup>

Among the missions of the public library identified in the Manifesto are the development of information and computer literacy skills and the support for and initiation of literacy activities and programmes. The Manifesto urges decision-makers at national and local levels and the library community “at large and around the world” to implement the principles of the Manifesto. UNESCO has endorsed braille as the only tactile script parallel to print.

Public libraries have a fundamental responsibility to braille users and providing access to braille books and services is an integral part of the purpose and missions of libraries as supported by both IFLA and UNESCO.

Society accepts the strong association between literacy, education and individual economic and social well-being as well as the prosperity of a community, its neighbourhoods and nation. Surveys of blind and visually

impaired people conducted in North America and Europe by organisations such as The Swedish Library of Talking Books and Braille,<sup>2</sup> the Washington State Library for the Blind and Physically Handicapped (WSLBPH)<sup>3</sup> and the CNIB Library for the Blind<sup>4</sup> reinforce what is accepted amongst the general population i.e. that strong reading or literacy skills enhances employability, opportunities for higher learning, and independence. In all three studies those who learned braille as their original reading medium and used it extensively were more likely to develop positive reading habits, were employed at higher rates and most likely to acquire graduate degrees. Neither technology nor taped recordings are acceptable substitutes for an ability to read and write in both the sighted and blind communities. The foundation of literacy in both communities is the ability to read and write print or braille. The following principles are intended to extend the spirit of the Manifesto to all types of library service for blind and visually impaired users where literacy and access are critical factors in empowering those unable to use print.

### **Principles of Library Service to Braille Users**

Braille is the parallel to print as the reading medium for blind persons. Libraries should be willing to promote the importance of braille and facilitate access to this resource for members of the community who are blind. The following key principles are fundamental to all types of libraries where the service can be accessed by a blind member of the community. Libraries should:

1. Provide seamless access to braille collections through whatever means are appropriate to their countries such as cooperative endeavours, referrals to sources of supply, interlibrary loans or resource sharing with other libraries or the development of collections as applicable.
2. Encourage the inclusion of all braille holdings in National or Regional catalogues as appropriate.
3. Promote the inclusion of braille in ongoing literacy programs.
4. Include braille or print braille versions of books in library programs such as story hours, literary discussions in order to encourage young blind children to read along with their sighted peers.

5. Include braille collections in their catalogues of library holdings or where technically feasible link to other library braille holdings.
6. Educate Library board and staff regarding braille as the means of literacy for blind and visually impaired persons.
7. Use braille as a medium for communicating with blind and visually impaired braille readers within the community.
8. Promote the availability of library services in braille in the community served.

### **Guidelines for Developing Braille Collections**

The following guidelines are the minimum that is required for adding or accessing braille books or information from other networks and sources for use by a braille reader in the community:

1. The accurate reproduction of the contents of a published print edition of a work shall be a foremost requirement of books or materials transcribed to any medium that results in a braille product such as hardcopy braille or electronic disk.
2. When content such as graphics or illustrations or advertising for magazines have been omitted there should be a statement to that effect.
3. Braille books shall conform fully with the currently applicable codes as approved by the recognised standard setting body in each country.
4. Each Braille volume should include the following:
  - A title page including the complete title, the author's name, the number of braille volumes, which make up the title and the pages in each volume.
  - Statement of copyright date and copyright holder as it appears in the print version.
  - The publisher's description of the book and information about the author from the book jacket.
  - Magazines should include on the front cover the title, month and year of issue; volume and issue number.
  - Magazines should include the names of main editors.
  - Editorial address of the commercial magazines

5. Tactile illustrations should be encouraged in the provision of information.
6. Packaging of hardcopy braille shall be of a quality to protect the braille book from damage in the mail or during transportation and should be able to be easily repackaged by the user for return.
7. Labelling should be provided in both print and braille on the cover.
8. National copyright requirements and legislation must be observed.
9. Bindings should be appropriate to support the book and protect the height of braille dots while safeguarding pages and preventing them from being easily ripped out. Books should be able to lie flat for reading.

**Notes:**

<sup>1</sup> Unesco Public Library Manifesto, 1994

<sup>2</sup> TPB: Underlag för fördjupad anslagsframställning budgetåret 1993/94

<sup>3</sup> Ryles, R. The impact of Braille Reading Skills on Employment, Income, Education and Reading Habits. *Journal of Visual Impairment & Blindness*, May – June 1996

<sup>4</sup> Understanding Braille Literacy and its Impact on Library Services to Blind Canadians. Committee on Excellence, CNIB Library for the blind

Submitted by:

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