THE CONSULTANT’S ROLE IN LIBRARY DEVELOPMENT

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Who are the consultants? What do they do? Where do they come from? Why are they involved in the development of libraries and information systems outside their homelands? Who hires them? How are they found? And are they effective? What is the role of the consultant in the development of information services in the Third World?

These questions prompted the Section on Theory and Research to sponsor a panel discussion on “The Consultant’s Role in Library Development” at the 44th Annual Meeting of the IFLA in Manila, Philippines, August 1980. The theme of the conference was “Global Information Exchange” and the first time that IFLA has been held in a Third World Country, thus providing an appropriate setting for the discussion of such a topic. The panelists and the keynote represented a variety of countries and backgrounds. Esther Dyer, Assistant Professor of Library and Information Studies, Rutgers University, has worked in Latin America,

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directed a federally funded project to train Spanish speaking librarians, and chairs the AALS Committee on InterAmerican Library Education Cooperation; Professor Mangla, (India) University Professor, a receiver of a great number of consultants from all parts of the world; Russell Bowden, Deputy Secretary, The Library Association, of Britain who had also for 11 years been a developing country librarian in Africa; Carmen Moreno, Chief Librarian, Biblioteca de Mexico, and formerly with the Ministry of Education with a background in all types of library development and another frequent receiver of consultants; Bjorn Tjell, consultant to Africa and other developing countries and advisor to the Danish Library Board on Third World Developments; Don Hausrath, USICA, regional library director for Asia, stationed in Manila and with extensive experience in China.

The following is a revision of the paper developed by Esther Dyer in collaboration with Patricia Layzell Ward, CLAIM, Loughborough University, to provide a framework for panel discussion about the role of the consultant in developing countries. The purpose of the paper and the discussion itself was not to provide a research basis for the consultant, but rather to identify problems and areas in which an association such as the IFLA might enhance the effectiveness of consultants in library development.

The Consultant’s Role in Library Development

The purpose of this section is to provide a framework for the commentary which follows, concerning the exchange of ideas, suggestions, and experiences among consultants and those who have received the advice of extranational consultants. In keeping with the IFLA theme of “Global Information Exchange: Librarianship in Developing Countries,” the focus of this paper is squarely on the role of the extranational consultant in the development of information services in those countries. Why this topic? The role of the extranational consultants is an important
topic for both consultant and receivers of such technical advise.

Important because vast benefits may be derived from such a process as well as many problems that need to be overcome. The contributions of these consultants to the development of library services in many regions of the world are well known. However great these contributions are, there have been and continue to be many problems inherent in a process which superimposes the cultural mind set, technical expertise and varied experiences of individuals from one culture upon the national realities of another country. Problems do exist in this process, yet the problem can be minimized and the contributions and potential use can be maximized.

What is a Consultant?

Various definitions of a library consultant have appeared in the literature. James Lockwood, in his article, “Involving Consultants in Library Change,” adapted a definition of management engineer consultants to Librarianship:

A library consultant may be defined as an individual qualified by education, experience, technical ability, and temperament to advise or assist on a professional basis in identifying, defining and solving specific library problems involving the organization, planning, direction, control and operation of a library. The consultant serves the library as an impartial, objective advisor and is not an employee of its organization.¹

The essential elements of this definition are professional abilities of the consultant coupled with the temperament or personal capability to advise, define or suggest solutions to library problems. Furthermore, emphasis is placed upon the objectivity of the consultant as an outside impartial agent.

Some distinctions have been made between a consultant as one who works on a project from the conception to completion
and a critic who intervenes at a specific point in a project. In practice, these lines are not as defined and the critic and consultant can be considered as one role. Additionally some cynics have described consultants alternately as hired scapegoats, missionaries, change agents and occasionally peacemakers, depending of course on the viewpoint and the image of the project consultant. Indeed while the formal definition of a consultant can be readily accepted, these latter roles are also a part of the consultant's role and may be included in the hidden agenda of both the employer and the consultant himself.

The descriptors applied to the consultant's role vary as a function of the expectations of the employer and the ability of the consultant to fulfill both stated and unstated objectives. Ultimately, success for both employer and consultant depends upon communications, definition and agreement on shared objectives, common perception of the problem, agreement as to preferred approaches to the problem and the parameters of the project. Among the obstacles to understanding is that of intercultural communications. Definitions of the problem identify cultural differences, such as space, time territoriality and social conventions as blocks which must be overcome or neutralized. Additionally, the human contacts made by the consultant are brief, lacking both past and future as well as many factors such as space and social practical are at variance with the accepted mode of the consultant's culture. Take, for example, the space difference between American and Middle Easterner. The American prefers a substantial distance between himself and others in conversation. On the other hand, when someone from the Middle East, for example, wants to have an exchange of ideas, wants to accent a particular feeling in conversation, he tends to move closer and closer to his colleague. Without meaning to do so, it is quite possible for the American to back away, to literally back himself in a corner as the Middle Easterner moves forward to make his point. In the jockeying for culturally acceptable space, understanding of the content of the interaction may be lost or in the
extreme, each may perceive a degree of hostility in the other where none exists. The consultant, like the traveler, is adrift in a new social structure, without links to past and future. The consultant meets contemporaries, those who share a community of time. The essence of the consultants’ experience is that he and his colleague become “consociates” . . . individuals who actually meet, share ideas and space as well as time.\textsuperscript{3}

Knowing about a culture, values of time, space and priorities are important for successful interaction with other professionals. Some people never experience that often used phrase “culture shock”. A strange culture can place many demands on the consultant, resulting in mounting pressure of fatigue, strangeness, overtaxed health and encourage feelings of separateness and intellectual inability to react to new situations and needs of daily living. Some consultants, as well as the leisure travelers, never experience culture shock and are flexible enough in life style to be able to adapt more readily to new situations and to new patterns of interaction.

**Situations that lead to the employment of consultants**

There are a variety of considerations that lead libraries, national planning agencies, universities, and international agencies to seek the services of a consultant. A classic consulting situation exists when “desired expertise is lacking for significant portions of a project and when the period of required expertise is delineated.”\textsuperscript{4} Domestically, in the United States, the single most common situation is that of facilities planning. Internationally, the motivating force is by and large the overall lack of trained librarians in developing countries and their interest in technical expertise. Sometimes, foreign aid or international agencies make funds available for special projects and they customarily include extranational consultants as part of a standard package along with equipment and long term training of nationals. Generally speaking, the reasons for employing an outside consultant include:
technical expertise; specialized skills; fresh ideas; ability to focus on specific problems; objectivity and ability to exercise additional influence on decision makers.

Typical projects for consultants include: long range planning, local surveys, collection development, architectural considerations, automation, development of bibliographic systems, library education, establishment or improvement of national library services, development of specific types of libraries and their functions within the parent organization. Within these rather broad examples of consultant projects, the function of the consultants range from influencing funding or governing agencies towards a particular viewpoint to mediating conflict within the existing system, providing a nonbiased, nonpolitical source of information, encouraging linkages and improving communications among professionals reviewing current organization structures and recommending long range plans for development. A perceived benefit of employing a consultant is that of providing funding credibility . . . the consultant with little vested interest supports for the world outside the library the need for additional resource allocation, increased budgets and staff requirements. Often, however, this is unrealistic since the range of the consultant's suggestions and ability to suggest improvements is limited by the hidden agenda of the employer and perhaps the financial interest of the consultant in being recommended for future employment and by the international organization. It may be difficult to satisfy the two masters—the host country and the international agency.

How are consultants found?

The process is neither scientific nor uniform and often comprised of serendipity and the invisible college instead of full information and adequate appraisal of a consultant's credentials. The majority of consultants are found through the invisible college, that person-to-person interaction of professionals, and the
experts used by such agencies as UNESCO, OAS, and CIDA. To use a personal example, last year I was contacted by the Instituto do Livro in Brazil to teach a course on public and school library development. I had never to my knowledge met anyone from this organization nor applied for such a position. My name surfaced through this invisible network. . . someone I had met at a professional meeting several years earlier. Once it was determined that I could arrange my schedule to meet their needs I was hired. My credentials were sent only about two weeks before I arrived. While in Brazil I was asked to recommend people for future consulting positions and thus perpetuated the network I criticize. The whole situation points to the need for developing countries to have an adequate review process for consultants under consideration.

Another means of choosing professional consultants is through reputation and publications. Obviously, a person's publications reflect his or her interests and may demonstrate levels of competency. However, reputation is an intangible measure. For example, someone who has an excellent reputation in his native country, and who has become well regarded by the library establishment may not be flexible enough to adapt time honoured principles of one country to the experiences of a developing one. And, in fact, this highly regarded consultant may offer pet solutions to library problems and may take the attitude that since this is how it is done in New York, London or Munich the same approaches are valid in Lima, Kingston, Addis Ababa and Cairo. Invariably, employment of such a consultant, often one who has never been abroad before, leads to disenchantment, frustration and failure to adequately resolve the problem at hand. Other sources of consultants are derived from advertisements by the consulting firms or individuals themselves.

Use of a single consultant as opposed to a team is another common initial problem faced by employers. A single consultant is most appropriately employed in such situations as course development, library education seminars and self-contained
studies. In other words, where a specialist or expert’s advice is needed for a specific limited period. One of the major difficulties encountered by the single consultant is the lack of peer support, the inability to communicate with other experts on locations and the need to operate alone. At times this problem can be alleviated by the use of consulting teams, thus providing the opportunity for diversification, interaction and additional input from both outside and inhouse sources. While both consultant and employer strive for the ideal in the initial problem negotiation and establishing of understanding, subsequent problems that arise may ultimately be beyond both their control. Such factors as changes in government, policy, legislative barriers, political exigencies, bureaucratic snafus, staff changes and lack of clerical support or acts of God can be cited as examples of uncontrollable forces. In order to minimize these problems, at least one local expert conversant with library politics and ministry of education procedures should be assigned to the consultant or consultants as a trouble shooter and liaison officer.

What are the qualifications and qualities of a good consultant?

The most important is the intangible asset of flexibility and cultural tolerance.

Precisely those qualities which cannot be evaluated by traditional means such as position or publications. The ideal consultant is culturally tolerant, is adaptable and able to understand the people with whom he will work and possesses the ability to listen to inhouse priorities and assess the capability of adapting to the new environment. While the consultant’s technical expertise is essential, in specific situations it is often the generalist who can put together the various strands of librarianship and apply those ideas which best fit the problem at hand and bring together in a team effort the ideas of specialists.

Perhaps the best consultants are those judged to be “mavericks” of the profession. Maverick is an Americanism that
refers to the lone steers who shunned the herd, crossing the plains. Mavericks very often are on the cutting edge of change, not afraid to voice unpopular opinions and to defend positions that are at odds with the norm. High prestige from the library community may even be synonymous with rigidity and bias towards one system.

Lastly, consultants may be suggested or even mandated by such organizations as OAS or UNESCO. Here much depends upon the political clout of the program directors. The variance in the quality of consultants is great.

The current informal and formal structures are inadequate. An international clearing house could be established to form a data base of potential and active consultants, including curriculum vitae, language skills and availability. The organization to develop such a base would be, of course, the IFLA. National associations might assume responsibility for development of a roster of consultants within their respective committees. For example, The International Relations Committee of the American Library Association has developed "Criteria for the Selection of Consultants to Serve Abroad" (see pages 7, 8). Included in that list is the mandate that the Association develop a roster of qualified consultants. Other national associations could develop similar lists within their countries and the cumulation of these lists could be combined into an international data base maintained by the IFLA. Annually updated, this data base could provide a first step in creating an appropriate resource for consultants search. Thus a broader base would be established for international organizations and countries to search for better matches between job descriptions and consultants qualifications. The problem is to contact a variety of appropriate skills, not simply those in favor with national organizations and to provide a mechanism for evaluation of consultants. In addition, such a clearinghouse managed within IFLA might encourage a "two-way" flow of consultants, including use of experts from so-called "developing countries" in already developed countries. We have much to
learn from each other.

The consulting process: things to ask or know before a project begins

Depending upon the level of complexity of a given project, anywhere from a single consultant to several teams and hundreds of individual activities may be involved. To be sure this latter type is rare, but consider the vast social project for libraries in Iran in the early 70's with Nassar Sharify. In order to assure that both consultant and employer are in agreement as to the process, development and anticipated outcomes, a structured process is desirable. The key phases in the planning and development of such a project might be organized along the line of a traditional management model:

1. Acquire environmental knowledge, political/cultural/professional etc.
2. Establishment of understanding of the perceived problem
3. Diagnose actual problem
4. Feedback to client
5. Establish understanding
6. Preliminary goal and position statement
7. Commitment to the project
8. Resource Analysis
9. Conceptual Planning
10. Plan approval
11. Master planning
12. Final commitment
13. Staged Implementation
14. Evaluation and redirection of plan

In reality however, the consulting process is seldom so organized and may involve constant reevaluation and redefinition of the project's parameters. Answers to certain basic questions by the
library agency should be provided for the consultant including the following:

1. What is the nature of the problem to be addressed?
2. What are the anticipated outcomes of employing a consultant?
3. With whom will the consultant or consultants work?
4. What is the history of the problem and what alternatives have been proposed and rejected or accepted and failed?
5. What are the parameters of the problem, time constraints, budget requirements and staff allocations?
6. What previous studies relate to this topic?

While it is important to establish understanding as a first step in the consulting process, invariably there are differences between paper descriptions of employment conditions, expectations and environment and the reality of the situation. It is often essential to go through the process of establishing a contract with the client, if a suitable and workable report is to be prepared.

Consultants are involved in a variety of levels of activity, ranging from high level policy intervention in which the consultant is asked to represent the library or the agency and act as an advocate for a particular program, project or policy to specifically defined and contained projects within the library or agency itself. Other levels of activity may be interorganizational in nature, requiring the consultant to act as a mediator in the development of, for example, resource sharing, library systems, or networks. Still other projects may be more specific, such as the development of a serials data base, a special collection or training project.

The consultant’s grasp of the national reality of the situation is often limited. In a small town in the Colombian mountains, the UNESCO sent a doctor to help establish a regional clinic. Upon arrival the doctor, to his dismay found that surgical instruments were being sterilized by boiling. He was quite disturbed at the lack of suitable equipment and immediately requested
an autoclave. The most expensive autoclave arrived in due time and the doctor proudly plugged it in and prepared for an operation, assuming that he could use his new gadget to sterilize the instruments. No sooner had the autoclave been plugged in than not only did the lights in the hospital go out but the generator for the whole town was blown out and did not operate again for a week. The autoclave, to my knowledge, still sits in the rural hospital, a monument to modern technology and its uselessness in certain situations. So, too, the library consultant must be careful to propose appropriate solutions, not simply cosmetic changes from his own country. Alternatives should be appropriate to the environment in which they will exist. There is an example of a country striving to develop a library school and national library. Staff is comprised mainly of inhouse trained librarians with a few masters level librarians who have trained abroad. Not surprisingly, an extranational expert was brought in to help in the planning for these agencies. Among that consultant's recommendations was one better suited to developed countries, namely that the library employ only master's librarians. No interim process or training program was indicated. How unrealistic, yet not atypical of unimplemented plans proposed by inflexible consultants whose perceptions of local realities are clearly based on home environment. The consultant often becomes a "point of reference" for the development of a particular library. Even when the report is tendered or the project officially completed, for the consultant, the rippling effects of even a short term of consultancy may be far reaching. For example, there is the question of professional commitment, of the invisible college, of professional and of personal contacts that continue far beyond the limitation of a consulting contract, and this may involve advice on future plans, on additional consultants, on the training of personnel in library school abroad.

It is important to realize that both the employer and the consultant assume a risk in the contractual process. While employers are wagering budget allocations and scarce resources,
they retain the perogative to replace a consultant or reject a
final report and seek additional advice. Consultants, on the
other hand, risk their reputations with each project and their
future job prospects. Reputations will be either enhanced or
diminished as a function of the satisfaction of the employer. In
cases where the host library or site for the project differs from
the actual employer (such as an international agency) the possi-
bility of satisfying both agencies may be difficult. The inter-
national agency may have its own agenda. To whom is the con-
sultant responsible? If the host library is not satisfied then the
consultant has not fulfilled his mission; on the other hand if the
international agency is not pleased the consultant is not likely
to secure employment from that source in the near future. Con-
sultants should be careful to choose projects for which they
possess the necessary skills or can amass a team with such skills.
In other words a project in which there is a good chance of success
and in which the requirements of the job are clearly delineated.
A brief summary of the consultant-employer situation may
be stated as "Let the employer beware, the consultant take care."

In response to the broad, general outline of the consulting
process, emphasizing the need for intercultural communication
and adaptation, the national reality of the reactors drawing on
a variety of personal experiences from all areas of the world
brought additional problems and questions to the attention of
the forum.

The following list of important facts to be considered in the
consulting process is a synthesis of the comments made by the
reactors during the Standing Committee on Theory and Research's
panel discussion in Manila. In reviewing the transcript of the
session, it is interesting to note the common themes which
emerged in the comments of the reactors from the developing
countries who have received a number of invited as well as "sur-
prise" consultants, and the consultants themselves who have
worked in developing countries.
Important Factors

1. The consultant must have or be able to achieve a thorough knowledge of the environment, politically and culturally as well as an understanding of the role of the library and its administrative constraints.

2. Clear definitions of the problems and a realistic expectation as to the goals and objectives of the project before the consultant is chosen.

3. An understanding of the cultural, academic, and experiential background of the consultant as major factors in their selection.

4. A developmental approach to the selection of consultants, which involves the local staff.

5. More reliance on local experts and experts from the same regions

6. Consensual agreement between the local staff and the consultant as to the problem, goals and objectives of the project and a realistic agreement about the anticipated results of the consultants' work.

7. Involvement of local staff at all levels of activities, with particular emphasis on project continuation beyond the limits of the consultants tenure.

8. Emphasis on bidirectional flow of communications between consultants and local staff.

9. Clearly determined parameters for the consultants especially those with access to the ministerial levels.

10. Feedback from consultants and local staff to international agencies.

11. Promotion of exchange of information among developing countries.

12. Outside evaluation of projects whenever possible.
Conclusion

The result of this panel discussion at the IFLA's 46th general meeting was to provide a forum for discussion of the consulting process, to share experiences of both consultants and receivers of consultants in several different areas of the world. It is hoped that the discussion will continue, that the profession will develop appropriate criteria, evaluation tools, and a better mechanism for identification of consultants with appropriate skills and matching them with specific projects in developing countries.

Notes


2. Edward C. Stewart, "The Survival Stage of Intercultural Communications" photocopy np, nd. For more information on Stewart's theories of intercultural and cross-cultural communications see: Edward C. Stewart, American Cultural Patterns: Cross Cultural Perspective (La Grange Park, Ill: Intercultural Network, Inc. 1972)

3. See Stewart, "Survival Stage of Intercultural Communications".

4. Lockwood, p. 502

5. Since this paper was written, the IEE, International Education Exchange, NY, has developed a consultant's database for all areas. Consultants are charged for listing their names but employers may query the data.
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BIBLIOGRAPHY

A case study of Guatemala, outlining approaches to teaching information techniques and discussion of communication satellites and the use of paraprofessionals as links between the library and the village.

Discusses the value of information in the Third World not just for monetary gain, but for its own sake. The differences between information rich and information poor societies can be minimized by giving culturally relevant information and technology.


The reasons to employ consultants, and how they can be cost effective. The specifications and background information consultants have to be provided with in order to do adequate construction and Improvement Porposals.


Parker, J.S. “Regional Cooperation in Library Services; An Opportunity for Developing Countries”, IFLA Journal, 2, (1976): 1–33. The 1975 Sevensma Prize winner. Studies environmental and structural problems in regional cooperation of developing countries in the library field. Proposes three rich models: Type 1, exchange of data between libraries. Type 2, one information library supplies data to others as needed. Type 3, a center distributes information to members. Discusses in detail the characteristic problems, and potential outcomes.


Sorgwe, C.M. “Library Services in a Developing Country”, Nigerbiblios 4 (January 1979): 17–21. Explores the ways in which governments can, with the right library authorities, plan and form library services in developing countries, by
a participant.


Details the FID (Federation Internationale de Documentation), the IFLA (International Federation of Library Associations) and UNESCO (United Nations Educational, Social and Cultural Organization) library programs and the problems they often encounter in creating library programs that are responsive and acceptable to the needs of specific cultures.