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**Quality – an on-going practice and reflection in a governmental library (1996-2006)**

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***Abstract***

*This paper discusses the different quality concepts and strategies implemented, since 1996, by a governmental specialized library – the Information Unit of the General Secretariat of the Portuguese Ministry of Education, and suggests specific characteristics of how learning of client –centred methodologies is related to Knowledge Management and Competences Management.*

*The Information Unit’s quality journey is analysed in terms of its three stages:*

- 1. Developing and implementing quality models and methods (EFQM – European Foundation for Quality Management - excellence model; CAF – Common Assessment framework, the self-evaluation framework recommended for European Public Administration Services) – 1996-2000;*
- 2. Developing and implementing a quality concept linked to Knowledge Management – 2001-2002.*
- 3. Developing and implementing a quality concept linked to Competencies management – 2003-2006.*

*The strengths, weaknesses, opportunities and threats associated with each of these stages are particularly stressed.*

*Finally, the social impacts of the Information Unit quality on-going practice and reflection are discussed. In this context, two facts are emphasised: in 1998, this information Unit was awarded with the Portuguese Quality Prize for Public Services for its innovative Quality Programme based on the EFQM model; and, in 2004, the Information Unit represented Portugal in several European quality events, namely the 3QC that took place in Rotterdam in September as a best practice for citizen charter and client focus.*

# 1. Introduction

The development of research in the field of quality in Public Administration has given rise to a large number of European initiatives that attempt to motivate governmental services in the construction of a culture of assessment. The aim of this paper is to present a longitudinal case study in a governmental specialized library – the Information Unit of General Secretariat of the Portuguese Ministry of Education - that suggests specific characteristics of how learning of client –centred methodologies is related to Knowledge Management and Competences Management.

## 1.1 Background

One of the main questions which guides research in the field of Quality Management is “Why some experiences are successful and others are failures?” or to put it in a different way, “Why quality initiatives obtain different performance levels?” In this respect, various organizational research lines emphasize different factors: leadership, change management, involvement of all staff, communication process, motivation and satisfaction. The presence of customer is always described as important and this trend has been accompanied by a multidisciplinary view and a wide body of academic and manager-focused research on customer satisfaction (namely SERVQUAL). There is less published material on customer delight through service excellence<sup>1</sup> (Berman, 2005): “delight is a construct related to but separated from satisfaction as it is based on different things (in the same way that dissatisfaction is related to but distinct from satisfaction). While customer satisfaction is generally based on exceeding one’s expectations, customer delight requires that customer receive a positive surprise that is beyond their expectations” (p. 129).

There are seven necessary organizational changes to better deliver delight:

- Being aware of the need for organizational change to establish delight objectives;
- Linking customer delight to bottom-line benefits;
- Looking at world-class customer satisfaction criteria;
- Listening to customer to ascertain what’s important;
- Empowering employees so that they can go “the extra mile”;
- Making measurement of customer delight and loyalty a priority, and,
- Linking focus customer research to benchmark studies

But what are libraries making in this field?

Libraries were once one of the major players in the information industry and until recently they did not feel the pressure of market forces and did not depend on the successful selling of their services (Cook and Thompson, 2000). Users of library

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<sup>1</sup> Kano (1984) developed a satisfier and customer delight model that explains the key differences between concepts: “one cannot merely satisfy customers through meeting their basic and performance needs. Must-be requirements consist of the basic criteria of a good or service that result in extreme customer dissatisfaction if not fulfilled. Since a customer expects and even demands a positive experience on must-be requirements, consumers take these requirements for granted. As a result, while severe customer dissatisfaction occurs if a must-be requirement is not fulfilled, the fulfilling of a must-be requirement does not result in consumer satisfaction” (Berman, 2005, p.130)

services, confronted with wider choice are becoming more and more demanding and the relationships between users and library services will depend to a large extent upon the way libraries redefine themselves to meet these challenges (Hernon and Altman, 1996). What counts is the value of the offer perceived by users. This value must be understood by librarians based on the difference between the expected and perceived value and quality of their services.

Better library performance depends on numerous external and internal factors such as the status of library, the degree of library management autonomy in decision-making; the professional level of managers and employees; the internal quality of work life and employee loyalty (Weingand, 1997; IFLA, 1996; Jordan, 1998). According to Fialkoff (1998), *libraries need marketing knowledge* to develop new services or make changes of the existing ones to satisfy their users better and to improve their organizational status and image to different stakeholders.

Information scientists have long been interested in: library surveys (1948, Royal Society Scientific Information Conference); how people, used information in relation to their work (Paisley, 1960); user needs and user behaviour (Line, 1967; Bates, 1979; Darwin, 1983); user information seeking behaviour (Wilson, 1979, 1981; Ellis, 1987; Kuhlthau, 1991). We have assisted to small scale studies and others which addressed methodological issues, theoretical frameworks of models of information behaviour and, more recently, integrated approaches to information seeking and retrieval research. Issues like the use of libraries' collections, catalogues and electronic resources are disseminated between LIS professionals all around the world. Information gathering and information seeking, passive attention and passive research are new terms that describe new advances in academic and workplace environments.

Wilson (1981, 1996)'s information behaviour models developed the concept of information needs related to the role of information in a user's everyday life and work<sup>2</sup>, introducing information behaviour in the context of an individual's environment, social role and psychological, affective and cognitive needs. An increasing number of researchers have begun, since 1996, giving attention to context-focused research (Pettigrew, 1999).

The need to recognize new knowledge, assimilate it, and apply it in libraries policies and strategies originates a new ability, referred as *absorptive capacity* (Cohen and Levinthal, 1990). *Absorptive capacity* can have an important role in innovation, library performance outcomes and in intraorganizational learning (Ochoa, 2004a; Ochoa, 2004b). Methodologies to listen users needs have *potential absorptive capacity*, which includes knowledge acquisition and assimilation in library procedures, products and services. It is necessary to study this issue in addition to prior research done. According to Durrance and Fisher (2005), the emerging question is *what difference do libraries and librarians make?* Or putting it in other words *what difference do libraries to meet customer needs?*

## 1.2 Research

The rapid pace of change that we all experience demands an unparalleled learning response from organizations. Major economics, social and technological pressures from

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<sup>2</sup> As mentioned by Harris and Dewdney (1994) people tend to seek information that is easily accessible, preferably from interpersonal sources such as friends, relatives or co-workers rather than from institutions or organizations.

all around the world have forced the European Union (EU) to claim Lisbon Strategy (2000) with a new emphasis on knowledge. Thus, to transform Europe in “the most competitive and dynamic knowledge-based economy in the world capable of sustaining economic growth with more and better jobs and greater social cohesion”, training and learning have become the expression of purposes until 2010.

In Portugal, INCITE – the Portuguese Association for Information Management - has developed a conceptual and methodological line of investigation (2005-2007) for formulating hypothesis and theories on customers’ needs through a different outlook about strategic dimensions of users’ roles, perceptions and satisfaction in governmental libraries.

One stream of research in organizational studies that has focused on both the internal service functioning of organizations and the relationship of that functioning to customer satisfaction has come to be “linkage research” (Wiley, 1996). In this line of thinking and research, the frequent interaction between customers and employees is used as a basis for the hypothesis that what employees experience in their work is correlated with the experiences they provide for customers, and that it is these customer experiences that can translate into customer satisfaction (Oliver, 1997; Schneider *et. al.*, 2005). This theme has been investigated in a number of studies of diverse service organizations, but, till now, it remained unexplored in governmental libraries. Early writings on quality in libraries emphasized the role of customer satisfaction and begun to examine this link more closely (Pinto and Ochoa, 1999).

In the current attempt to understand the strategic dimension of service focus on customer demands in governmental libraries, this study parallels recent work on quality research in which researchers have distinguished, not only between generic dimensions and activities to listen customers, but also between organizational strategies and organizational learning. Our hypothesis is that libraries who emphasize the importance of service quality will be especially likely to take the necessary steps to create a new internal behaviour (organizational climate) that will drive them into a new culture and interest in customer needs.

Special attention was devoted to study customer satisfaction as the principal criterion for measuring the quality of user service process. As defined by A. Lakos (1998), a “*Culture of Assessment is the attitudinal and institutional changes that have to occur in order for library staff to be able to work in an environment where decisions are based on facts, research and analysis, and services are planned and delivered in order to maximise positive outcomes and impacts for library clients. Culture of assessment is an integral part of the process of change and the creation of a customer-centred culture*” (p.278).

Several case study researches used a narrative approach<sup>3</sup>. The value of narrative methodologies is increasing in organization studies<sup>4</sup> (Rhodes and Brown, 2005):

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<sup>3</sup> Researchers from INCITE conducted interviews of staff and library top management.

<sup>4</sup> According to Rhodes and Brown (2005), the history of narrative in organisation research is relatively brief: the earliest explicit uses of narrative approaches to inform methodology in management and organization theory date from the 1970s. As the research focus on organizational culture and symbolism grew (1980 and 1990), so did the use of narrative to explore the meaning of organizational experience. Complementing the idea that people in organizations are storytellers and that their stories constituted valid empirical materials for research, a related methodological position soon began to be articulated developed new methodological positions. Today, narrative research is multi-faceted and is

“organizational story and storytelling research has produced a rich body of knowledge unavailable through other methods of analysis” (Stutts and Baker, 1999, p.213). In particular, we are interested in examining customer needs studies as a form of narrative. Our goal is to provide theorists and practitioners with an additional interpretative lens ...” Among its various attractions as an approach for studying strategy, narrativity emphasizes the simultaneous presence of multiple, interlinked realities, and is thus well positioned for capturing the diversity and complexity present in strategic discourse”(Barry and Elmes, 1997, p. 3).

A narrative view of customer focused library strategy may stress how language is used to construct meaning<sup>5</sup> (Weick, 1995) and may explore ways in which different libraries stakeholders create a discourse of orientation (whether about becoming, being, or having been) to understand and influence one another’s actions. A narrative approach assumes that strategy telling fundamentally *influence strategic choice and action* (Barry and Elmes, 1997).

Another key contribution of this methodology is the attention it focuses *on temporal issues in organizations*: “rather than viewing organizations as static, homogeneous and consistent entities, narrative approaches demonstrate the process characteristics of organizations and can render both the paradoxes and complex causal relationships inherent in organizational change open to analysis”(Rhodes and Brown, 2005, p. 177) and by *listening to, documenting, analysing and reporting the different stories* that people tell about their organizations, narrative researchers brought the subjective experience of people in organizations within the focus of research (Rhodes and Brown, 2005, p.178)

In examining how quality approaches impacts LIS professional competencies and users informational behaviour, our approach is linked to strategic outcomes. Thus, the perspective taken in this study is one of strategic management and aims to: a) develop a model to characterise the available empirical research on user studies and quality management; b) evaluate the existing research methods through a case study; and c) suggest some specific directions for future research from a strategic management perspective (Altshuld and Witkin, 2000).

Consistent with evidence-based theory, it reports the findings of the case study on the Information Unity of the Ministry of Education and, especially, its model – *Needs driven organizational strategies (1996-2006)*, which suggest a useful starting-point to identify and classify the dominant perspectives in the study of customers needs in Portugal.

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used in several studies, providing a methodological position through which to engage not with a presumed neutral ‘real world’, but with the complex nuances of the ‘lived’ world.

<sup>5</sup> Donald Polkinghorne (1988) explains: “Narrative is a form of ‘meaning making’...Narrative recognizes the meaningfulness of individual experiences by noting how they function as part of the whole. Its particular subject matter is human actions and events that affect human beings, which it configures into wholes according to the roles these actions and events play in bringing about a conclusion...The narrative scheme serves as a lens through which the apparently independent and disconnected elements of existence are seen as related parts of a whole.” (p.36)

## **2. Pilot study : the Information Unity of the Ministry of Education (1996-2006)**

The Information Unity of the Ministry of Education has developed a quality program since 1996 based on an original model of client-centred strategy (Fig.1). During the last ten years, it has been developing and implementing quality models and methods (EFQM – European Foundation for Quality Management's excellence model and CAF – Common Assessment framework, the self-evaluation framework recommended for European Public Administration Services)<sup>6</sup>.

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<sup>6</sup> This Information Unit was the first Portuguese public service to develop a quality program and the first one to implement CAF. It is a best practice recognised in Portugal and in Europe. In 2003 and 2004, it represented Portugal in quality European events.

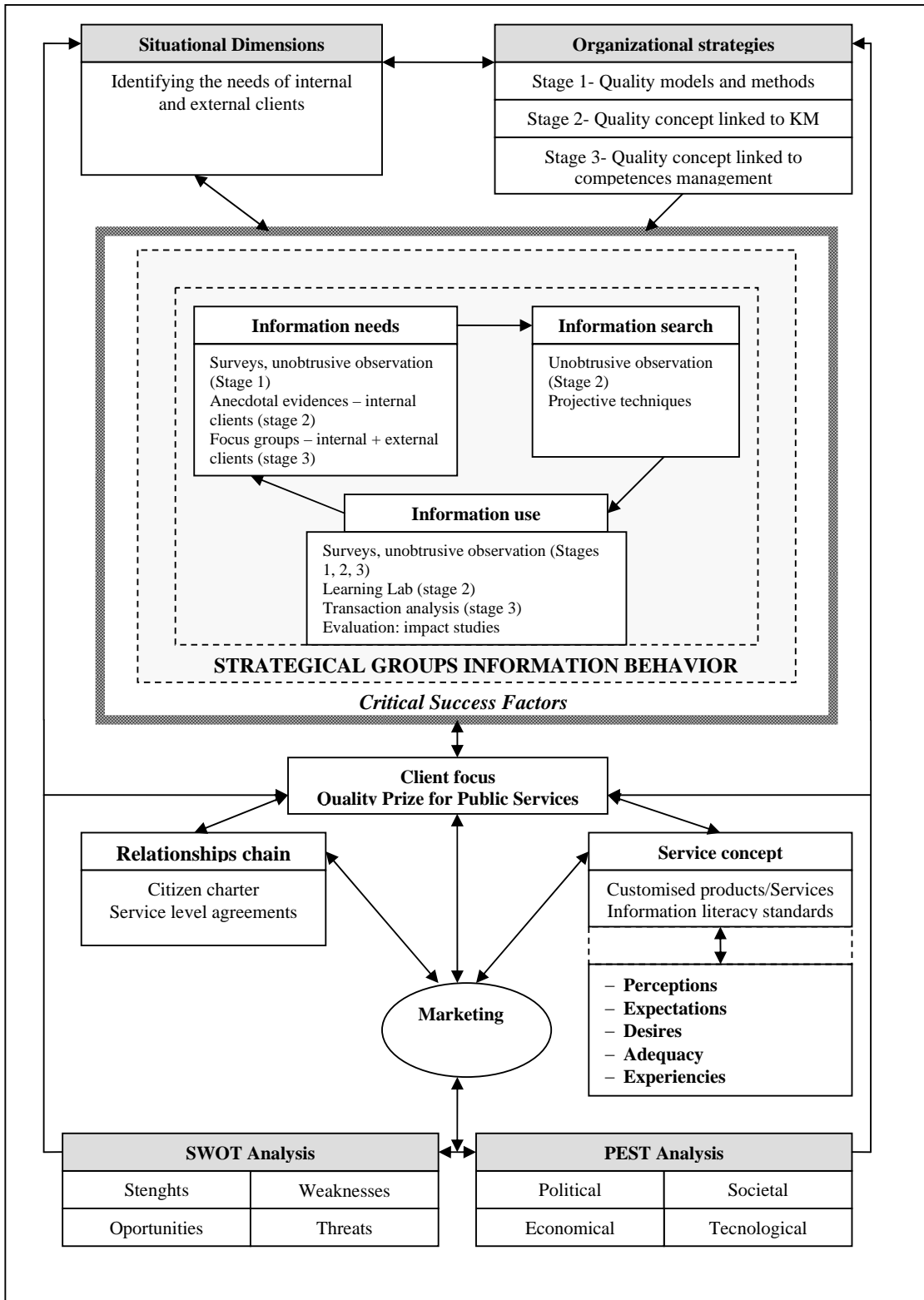


Fig.1 - The Needs-driven organisational strategies model of the Information Unit of the Ministry of Education (Portugal) (1996-2006)



In 1997, the Information Unit established its NEEDS DRIVEN ORGANISATIONAL STRATEGIES (1996-2006) model, a framework for monitoring and evaluating user behaviour in Information Seeking and Information Use, using a mixed approach of qualitative and quantitative methodologies. It should be noted that, this paper does not intend to present the model in great detail, but only discuss the main topics and related findings.

## 2.1 Developing and implementing quality models and methods– 1996-2000

The first stage was developed through a market opportunity analysis (SWOT<sup>7</sup> and PEST<sup>8</sup>) and a new *service concept* based on just in time service. This particular focus was conducted through a study on the information needs<sup>9</sup> of five user segments (*strategic groups' information behaviour study*): *students, teachers, governmental decision-makers, educational professionals and citizens interested in educational policies and pedagogical methods*. Each user was confronted with a list of information sources (formal and informal) and asked “How do you solve your information needs?” and “What kind of library service do you need/expect to satisfy your information needs?”. The method used was a personal interview, based on narrative interview (Denzin, 1988) with the main emphasis on personal experiences in the library. Every year, a new study is carried out in order to obtain new costumers perspectives.

A key finding of this first study was that users want *personal attention and do need and use library services that guarantee quality in their different channels of contact with people* (reference service, distance services, library loans, and library facilities). Its first impact on library services was the creation of a new role for librarians: *the user ombusdaban* (user purveyor). This role has two main functions: to listen to the *voice of user* about their services' perceptions, information value and needs and, secondly, to develop relationship marketing<sup>10</sup> (Gummesson, 1987; Czepiel, 1990) by creating opportunities to analyse what *services dimensions* must be publicised and which *truth moments* are well managed. It was the first Portuguese experience in this area (1997) and intended to be a *best practice* in LIS sector<sup>11</sup>.

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<sup>7</sup> *SWOT analysis* – Strengths, Weaknesses, Opportunities and Threats – was originally developed by Ansoff (1987) and, according to Turner (2002), there are two primary methods of filling in a grid: the first is to work the four headings one at a time. The second is to allow issues to be generated and then discuss where on the grid they should be placed. The first method tends to work better when people are not familiar with the tool; the second approach is better within a group with previous experience.

<sup>8</sup> *PEST analysis* – external analysis about four headings: political; economic; social and technological issues. The discussion of these factors is important to analyse the impact on the library and its strategy.

<sup>9</sup> It was considered that information needs arise out of situations to a specific task that is associated with work roles played by each user. Intervening factors such as age, specialization, geographical location, frequency, degrees of urgency, type of information sources used, perceived quality (technical and functional), relevance of information, complexity of information seeking processes and the results obtained were studied in their impact upon their information requirements.

<sup>10</sup> Relationship marketing identifies which relationships must be searched and how they must be managed. Gummesson has the 30 relationships approach (1999), all vital for strategic planning.

<sup>11</sup> As Lakos and Phipps (2004) pointed out, “...assessment has not been taught or appreciated by the profession. It involves ‘visioning’ by the organization, which requires knowing what customers value and focusing on continuous improvement. The evolution of library activities into functional ‘silos’ such as circulation, cataloguing, acquisition and reference service has imposed an organizational structure that assigns to the administrative periphery the activities concerning with planning, data gathering, assessment and evaluation. In the same way, it has assigned its customers to the periphery” (p. 351)

This survey activity has been carried out in annual cycles since the beginning of the project till now. Table 1 synthesises the results of this survey activity.

Surveys	Total
Staff questionnaires	19
Costumer questionnaires and interviews	28
Focus groups	17
Student e-mail questionnaires and focus groups	34

Table 1 – Survey activity (1996-2006)

In addition, the connections between the service concept and the marketing strategy have been systematized through an integration of services and products customised through the identification of information needs and information literacy levels in order to improve them and manage perceptions of information needs by the development of learning labs as a key strategic service. A literature review shows the great diversity of approaches focusing on learning styles and information literacy. Thus, for example, information literacy has been treated as an outcome and a process of libraries with missions related to education goals (school libraries, academic libraries, public libraries). Governmental libraries are less involved in this dynamic. Consistent with this view, the library studied in this paper regarded information literacy as a process that flows between explicit information needs and non-explicit information behaviour. Among the studies emphasizing the link between information literacy and relationship marketing, the contribution of the *Observatory on the Information-Documentation Profession* (Op-ID) should be mentioned. In fact, a recent study on self-image and external image of Portuguese information professionals' skills, shows that users long for good relation with librarians (Pinto and Ochôa, 2006)

Another method use was unobtrusive observation<sup>12</sup> in order to obtain more information about staff and users information search. These observations were made by LIS students that want to explore information needs and inter-related methods. This was especially useful to obtain information about librarians' personal methods to understand needs during reference interviews (*information search*).

Based on sixty costumer experiences, the Information Unit have extended their strategies and established a Citizen Charter with seven service level agreements based on service quality aspects: reliability, competence, responsiveness, access, and credibility of information, communication focused on information needs and

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<sup>12</sup> “As opposed to the obtrusive method of evaluation, the unobtrusive approach is, as the name indicates, a method by which the subjects are not aware they are being evaluated. The most common methodology is to set up a battery of test questions, with known answers, and then put them to librarians.” (Katz, 1987, p.203) Participant and non-participant observation have been used to study the information needs of various groups of people. Usually the observation element is triangulated with survey data (Cooper, Lewis and Urquhart, 2004)

information alerts and understanding customer ways of consuming information. Through focus group interviews, content analysis and in-house and online survey, the Charter is monitored each year so that the provision of better services can be achieved.

In 1998, this Information Unit started evaluating performance using some indicators, once more with special focus on what customer opinion was. In the same year, it was awarded with the *Quality Prize for Public Services*, being the first Portuguese library to get such honour in governmental services. Two main reasons were at the top of the jury decision: the high level of satisfaction of users and the high level of satisfaction, motivation and professional competence of library staff.

## **2.2 Developing and implementing a quality concept linked to Knowledge Management – 2001-2002.**

The second stage began with a special attention on customised products and services. The Information Unit identified through *focus group interviews* and *unobtrusive observation*, several ways of using library services (informational behaviour). The new dimensions were related with need of staff support when questions were seen as complex. Further, other studies have attempted to identify key dimensions of feedback to users and feedback to staff, creating three new quality attributes: *core service*, *supporting service* and *user encounters (their perceptions, expectations, desires, and experiences)*. All of them were related with information literacy standards and a more effective way of providing information adapted to known and unknown information requests. The existence of an ethical policy was considered a critical success factor and an Ethic Information Charter was therefore developed.

The quality concept was now linked to another aspect of management: *knowledge*. Based on the ideas proposed by Nonaka and Takeuchi (1995) and Leonard-Barton (1998), creativity to listen to customer needs was encouraged, as well as other enablers like continuous experimentation, information-porous boundaries and cognitive diversity, trust and commitment. Without a common goal, it would be impossible to judge the value of information or the importance of new knowledge.

Participation in the movement of organizational improvement must be active. An attitude of continuous reflection is needed in order to enhance the role of relationships, networks and interactions between organizations and its clients. In this context, the competitive environment of the Information Society made imperative the creation of an Observatory on Quality of Knowledge and Information Services (OQIKS) based on a knowledge partnership between the Information Unit of the Ministry of Education and another Portuguese central Public Administration – Inofor - Institute for Innovation in Vocational Training and (2002).

OQIKS can be viewed as a librarianship phenomenon for fostering educational and vocational training professional community in knowledge management dynamics. Its particular form reflected the values, interests and strategic approaches of two different organisational cultures through formal and informal contacts. It combined observation with action and was specifically focused on support, guidance and encouragement of reflexive management, working collaboratively with the actors involved (Ochôa and Pinto, 2004).

During the 2002-2003 period, OQIKS developed a number of actions to provide knowledge and skills for inter-professional work. Simulation of collaborative skills and reflection upon inter-professional experience on quality management formed the basis

of a learning process between librarians and a team of administrative professionals of a quality awarded school, both grouped as a project team during a period of 14 months (September 2002-November 2003). As a result of this approach, two “learning-labs”<sup>13</sup> were created: the first, lasted for 6 months and was focused on the development of a *Manual of Procedures for School Administrative Professionals*; the second, as a natural extension of first one, lasted for 8 months and was focused on the construction of an *Organizational Skills Manual for School Administrative Professionals*.

OQIKS followed an action-research methodology and, therefore, in the “learning labs” librarians (the research team members) were also participants in the actions they were researching and tried to work collaboratively with practitioners as showed in the following stages:

1. *At the planning stage*: by providing “state of the art” information and conceptual models (tacit-explicit knowledge). The group was in charged of managing the “learning-labs”, which is educationally useful in an inter-professional collaboration project. There were different levels of information access and skills, both across and within the two professional groups; therefore, it is a valuable learning experience to be alert to the potential importance of information skills in practice and to have considered possible solutions to information access problems.
2. *At the implementation stage*: by analysing, documenting and supporting reflection and dialogue (explicit-transmitted knowledge). The timing and the nature of facilitators’ interventions needed to be in accord with the group activity. Facilitator intervention must be carefully tailored to the needs of the group. In our case, the group needed help with processes management to separate routines conceptual framework and professional interactions, with particular focus on tasks and effectiveness.
3. *At the evaluation stage*: by enabling partners to learn from partnership experiences and best-practices, stimulating and enhancing value for services (transmitted-transformed knowledge).
4. *At prospective sceneries*: by developing librarian’s market value and developing knowledge communities of practices and interests.

This research demonstrated that innovative working relationships between librarians and other professional groups resulted from librarians’ facilitator roles and their intentional use of team leadership to develop management skills. Using the extensive research on adult development, adult learning, career development and staff development, OQIKS have focused on processes that account for the development of objectives and activities, mentoring and peer-coaching programs and their impact on practices and learning about information needs (Ochôa and Pinto, 2004).

### **2.3 Developing and implementing a quality concept linked to Competences Management – 2003-2006.**

A context of trust and commitment can be achieved by establishing particular values and attitudes towards costumer needs that guide actions and relations between library

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<sup>13</sup> Learning laboratories were based on a framework influenced by learning theories: conversation theory; Kolb’s theory of experiential learning, reflective practitioner and anchored instruction.

and users. In relation to this idea, Fig. 1 shows some aspects that can help improving a quality concept in a shared context for the creation and transfer of knowledge through a staff competence policy<sup>14</sup>.

ECIA – European Council of Information Associations published, in 1999, the *Euroguide LIS: the guide to competencies for European professionals in library and information services* and, five years later, a revised edition showed up. As a member of ECIA and a partner in the *Euroguide LIS* project, INCITE published both Portuguese versions in 2001 and 2005, respectively. This guide describes and maps in detail all competences which may be required for a information professional and it is now a national paradigm to manage staff in governmental libraries. In this sense, The Information Unit of the Ministry of Education, since 2003, is investing on the development of a model of Competences Charter, once more to enhance its services.

Having identified the domains of the concepts of library services, the Information Unit turned to their distinction from the *distinctive competences* strategically relevant to users and the entire value chain. Thus, it is possible to make visible the capabilities that are capable of leading to the conception of user satisfaction and delight. Their strategic competences derives from (1) exploitation of sets of skills that users value; and (2) exploitation of news combinations of relevant core competences (Phahalad and Hamel 1990) defined as an organisation's collective learning, particularly those related to how to coordinate diverse skills and integrate multiple technological currents.

These competences include different aspects: they include knowledge that can be transmitted and shared by several people within the library and they also embody the learning skills, thus requiring social interaction with costumers to become a continuous loop to convert tacit knowledge into explicit knowledge. One of these competences is the capacity of evaluating and investigating dimensions of service performance, cost-benefits analysis and user outcomes and further identifying potential measures for new assessment programs.

In this stage, the online service quality attributes were systematically and extensively studied. The questions posed to costumers included: *What is high quality online service?* And *what are the key-dimensions of online service quality?* What actions can be taken to deliver high quality online services? Computer and Internet usage information (transaction log) were also considered.<sup>15</sup>

The key, therefore, is to uncover, among various potentially predictive service quality attributes, particular dimensions that are most crucial in enhancing the perceived level of service quality and to assess the degree to which they are associated.

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<sup>14</sup> Competence concept is used since 1960s. In Europe, competence and skills are considered a priority to sustain individual competitiveness in labour market. Le Boterf (1995) has a competence dynamic model that is a key reference to same LIS professionals in Portugal (Pinto and Ochoa, 2005).

<sup>15</sup> Key questions are: Which electronic information services do users use? How do users use electronic information services? What are electronic information services used for? What influences the use of electronic information services? Are there variations in electronic information services use between different user groups (academics, students etc.) and disciplines? What influences electronic information services use over time?

### 3. Social impacts

In September 2004, INCITE was invited to carry on a critical evaluation of the case of the Information Unit of the Ministry of Education, which was considered a best practice in the Portuguese LIS field.

In this evaluative context, two facts were emphasised: in 1998, this information Unit was awarded with the Portuguese Quality Prize for Public Services for its innovative Quality Programme based on the EFQM model; and, in 2004, the Information Unit represented Portugal in several European quality events, namely the 3QC that took place in Rotterdam in September as a best practice for citizen charter and client focus. These facts confirmed the value of longitudinal studies that concern customer-centred evaluations and strategies. The evidence from that evaluation identified the need for other studies in the field and its model set a base line for emerging themes for valuable evidence in LIS services.

### 4. Lessons learned and future research agenda

Work in the area of user needs carried out by the Information Unit has gained special evidence over the last decade. Much of this work is involved with user studies issues such as:

- Surveys
- Focus group
- Interviews
- Unobtrusive studies
- Satisfaction and delight studies

The choice of methods is viewed as *complementary* to each other: the survey obtained detailed information from user targets about their opinions on their information needs and ways of consuming information services and products. The analysis of user comments supported user requirements and were treated as priorities to attend on the Information Unit's action plans. Focus groups expressed user scenarios and preferences and gave several ideas about the relationship between expectations and moments of truth in delivering services. Unobtrusive studies provided information and reactions about staff performance when trying to answer information needs. All these methods provided a broad spectrum of information literacy skills and represent successful interactions with users.

The Information Unit transformed these results into new services. A conceptual framework created for assessing user needs (*vid.* Fig. 1) identified five distinct areas:

- *market opportunity analysis*;
- a new *service concept*;
- *the user ombudsman* (user purveyor);
- *relationship marketing*;
- a *Citizen Charter* with seven service level agreements based on service quality aspects: reliability, competence, responsiveness, access, credibility of

information, communication focused on information needs and information alerts and understanding customer ways of consuming information.

These initiatives were used to the continuous improvement quality services, based on strategic approaches: Knowledge management and Competences management to develop new context-sensitive instruments to identify ways of analysing users' information needs. This strategy aggregates some indicators that can be used to service models and benchmarking and identified a set of activities: providing what is perceived by users as quality information transaction and increased access to information to more people. Each service is focused in the set of information needs of each user segment and marketing relationship is established accordingly with their expectations and perceptions. This allows us to understand the impacts of services and to reformulate what is wrong. Each librarian acts as a facilitator of information needs.

The present study provides several issues for future research. It provides empirical evidence that incorporates multiple levels of analysis and examines individual-level as well as organizational-level variables. Grounded in an evidence-based approach, the model presented can provide a new insight for empirical work.

Moreover, the usefulness of the presented model for marketing strategies must be highlighted. While customer-centred focus is a natural process of any marketing approach, we understand the different stages mentioned as the set of LIS policies and decisions that can have impact in internal and external factors and be consistent with the literature focused on customer needs (e.g. Berman (2005); Berry (1995); Dalrymple et.al.(1999); Dietz, J.; Pugh, S.D. ; Wiley, J.W. (2004); Donovan, P.; Samler, T. (1994); Johnson, J. (1996), among others).

Particular combinations of organizational mechanisms may investigate more impacts in the future. We suggest researchers investigate information needs further by better understanding the role and contribution of quality methods and tools. There is an emergent network of relationships between governmental libraries and quality outputs. We assume that as this case matures, other libraries will pursue their quality journeys and become more affected by successful performance in their strategy. Firstly, we predict that client-centred issues will create and sustain survival of a great number of small libraries. Secondly, the frequency and satisfaction of clients will become the portrait of a viable professional service.

In this sense, INCITE would like to continue with this interesting area of study, focusing on the development of interorganizational learning and its relationships with this model, and investigate how LIS learning partnerships may impact the diffusion of customer-focus services and each levels and stages can be reached.

In conclusion, studying this journey to quality offers new longitudinal insights for both researchers and practitioners, who should benefit from more customer-centred research designs. Information professionals should continue to study customers' needs in various fields of management (quality, competencies, knowledge) in anticipation of new environments, services and user expectations.

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