Statement of Competency D

D. Apply the fundamental principles of planning, management and marketing/advocacy

In order for libraries to successfully carry out their missions to provide services to their users, they must have well-organized plans and frameworks in place for marketing these services. Public libraries have a mandate that calls for providing service to all those who enter. In order to meet their users’ needs for information of all varieties, they must advocate not only for these users’ needs, but for their selves as well. By speaking out for their users, libraries are also at the same time speaking out for their selves as the institutions that can best serve them. Thus, there is a direct connection between advocating for users and for libraries, as libraries cannot advocate for their users without advocating for themselves. Advocating for users means, among other things, advocating for users’ rights to freely access information without fear of scrutiny or reprisal and developing programs and resources that meet the needs of specific groups, be they literacy programs, providing meeting spaces, setting aside resources for teens, children, and job seekers as well as providing materials that reflect the compositions of the communities they serve, including materials in languages other than English. Often, advocacy includes advocating and reaching out to those members of the public who may not be in secure economic or financial situations.

Advocacy often requires financial support to develop needed services that can only be done in cooperation with non-profit and philanthropic organizations, and public sources of funding. Obtaining financial support requires good planning and marketing. Funding agencies will not willingly grant financial resources for plans that are either non-existent or poorly thought out. Therefore, a good marketing plan is essential.
Jonathan Leff – Statement of Competency D

Developing a good marketing plan requires good management, as a poorly managed or organized administrative structure in a library will stand in the way of those who wish to come up with plans to improve service for their communities by either not having the foresight to imagine plans that expand library service in new and innovative directions where needed and thus not approving them, or by having an organizational structure that impedes the decision making and approval process due to an excess of inefficient procedures.

The goal of a marketing plan is manifold. The marketing plan needs to raise awareness among the many stakeholders in the project, such as community and user groups, members of the library administration and funding groups who have a vested interest in the service that the library seeks to provide. The marketing plan must provide not only details of the services that the library seeks to provide or expand, but it also needs to provide details of the ways in which the library intends to implement its goals over a time period that will often last a few years, as well as how the funding it receives will be utilized. In addition, libraries that receive funding usually have to provide regular progress reports to all of the stakeholders involved.

Outside of the world of the library as entity, there is also the phenomenon of the independent information professional (IIP). These are people who decide to go into business for their selves using their research skills on behalf of private clients. IIPs are either solo entrepreneurs or work in small groups businesses. A great deal of marketing and planning is involved to start their businesses, market their products and services to potential clients, build a client base, and most importantly, stay up to date regarding the skills and services that they can provide to clients. Marketing and planning involves creating long-term budgets, keeping clients updated as to products and services through either electronic or print communications, such as email, blogs, web sites and newsletters. Marketing and
planning takes up a large portion of the IIPs business day, over and above the actual research performed for clients. Marketing is also a form of advocacy on behalf of the client for whom the IIP is marketing his or her services. A successful marketing effort demonstrates to clients that you are there to work for them and provide them with information that will be of use to them. In other words, the marketing effort demonstrates to clients that you are advocating for them by demonstrating that you are there to meet their information needs.

Evidence and Criteria for Selection

1. LIBR 204 – Information Organizations and Management – Strategic Planning Project

   This assignment was a follow-up to a case study that I had done with the same group of students on the issue of homeless patrons who use public libraries, and how best to accommodate the needs of this group of users. For this project, we created a fictional Office of Outreach Services that would be situated within the San Francisco Public Library, whose goal would be to assess the needs of homeless patrons and direct them toward social services as needed. The various issues we examined in preparing this report included the identification of key stakeholders in this project, both from within the library and in the community at large, and identified the issues that would need to be taken into consideration and addressed by the library leadership before implementing the plan. We identified a fictional team to manage the office and also looked at the management styles that each team member would be using, and how these styles would complement each other. We also developed a budget, needs assessment tools, a mission statement and strategic initiatives. In addition we outlined the context of the situation of homeless persons both within the context of the library and how homeless persons make use of its services and facilities, as well as within the context of social services and advocacy groups within the City of San Francisco as a whole. This
was truly a group effort, with each person playing an equal part, and with all the members of the
team collaborating with each other as fully as possible. The contributions I made included
researching actual past budgets for the San Francisco Public Library, creation of needs assessment
tools, collaboration on the strategic planning initiatives and general editing of the paper.

I feel that this evidence demonstrates my ability to use the theories and practices involved in
good management by working with others to assess a library’s needs and goals, including those of
a particular user group, and collaborating in planning to market services that address the needs of
the particular group while helping fulfill the library’s mission of providing service to all users
regardless of economic or financial status.

Note: I received permission from three of the group members to be identified by name for
purposes of this competency statement. I was unable to obtain such permission from the fourth
member who has therefore will remain anonymous.

Plan

The purpose of this class was to study independent information professionals (IIPs). This
assignment was the final project for this class and involved the creation of a business plan that
showed my vision for my business, an analysis of the market to which I am targeting the business,
a strengths-weakness-opportunities-threats (SWOT) analysis in which I examine all the issues I
need to take into consideration when planning, the organization of the business (in this plan I am
the sole proprietor), my marketing strategy and a budget for the first year. The vision I had was
one of providing research and information services to educational entities and non-profit
organizations who may not be able to have such services or be able to afford to incorporate them
into their own business. My goal was to support these entities through providing them with services that could be of benefit to them and help them fulfill their educational missions. The products and services I offer in the plan are based on my analysis of the market and the niche that my business could fill. I constructed my plan using tools and information I had learned throughout the semester, as well as information I obtained from the Small Business Administration on how to write a business plan.

I feel that this evidence demonstrates my ability to use marketing and planning strategies at the level of a small business to promote the activities of institutions that I feel serve an important role in promoting education, thus, in a sense, advocating for those who advocate for others.

**Conclusion**

While the goal of the library is to provide access to information for those who seek it, this cannot be done without a fair amount of effort on the part of libraries to ensure that structures and services are in place for their users. This effort involves marketing campaigns that make current and potential users aware of the services that the library has to offer, which in turn requires good management that facilitates planning and outreach to those who may be of assistance in helping libraries meet the financial goals that will help them maintain current services and create new ones based on user need. By undertaking these marketing and planning efforts, libraries are actively advocating for their users by ensuring that they can continue to provide a variety of services for all users, even those who are at the bottom of the economic ladder. Though the work involved in marketing and planning is often invisible to the average library user, it is crucial in helping libraries fulfill their missions of service.