

» “A library is the only single place you can go to learn something new, be comforted, terrified, thrilled, saddened, overjoyed, or excited all in one day. And for free.”

-AMY NEFTZGER

# Strategic Library™



Issue 28 // May 15, 2016

## Planning a Digital Media Commons

» **By reviewing a prototype before committing to a final design, Northeastern University achieved its redesign goals.\***

### SUCCESSFUL PUBLIC LIBRARIES IN THE NEW INFORMATION AGE

*Guided by research and their patron's needs, public librarians adapt and adopt new technologies.*

### IMPROVING PATRON WEB ACCESSIBILITY

*Libraries can become more inclusive and deliver on the promise of the ADA by aiding persons with disabilities.*

### LESSONS IN LIBRARY LEADERSHIP

*By aligning strategic, tactical, and operational plans, leaders can keep their libraries focused on achieving realistic goals and objectives.*

### RESEARCH DEFINES AND GUIDES LIBRARIES

*Surveys provide authoritative data for library planning and decision making.*

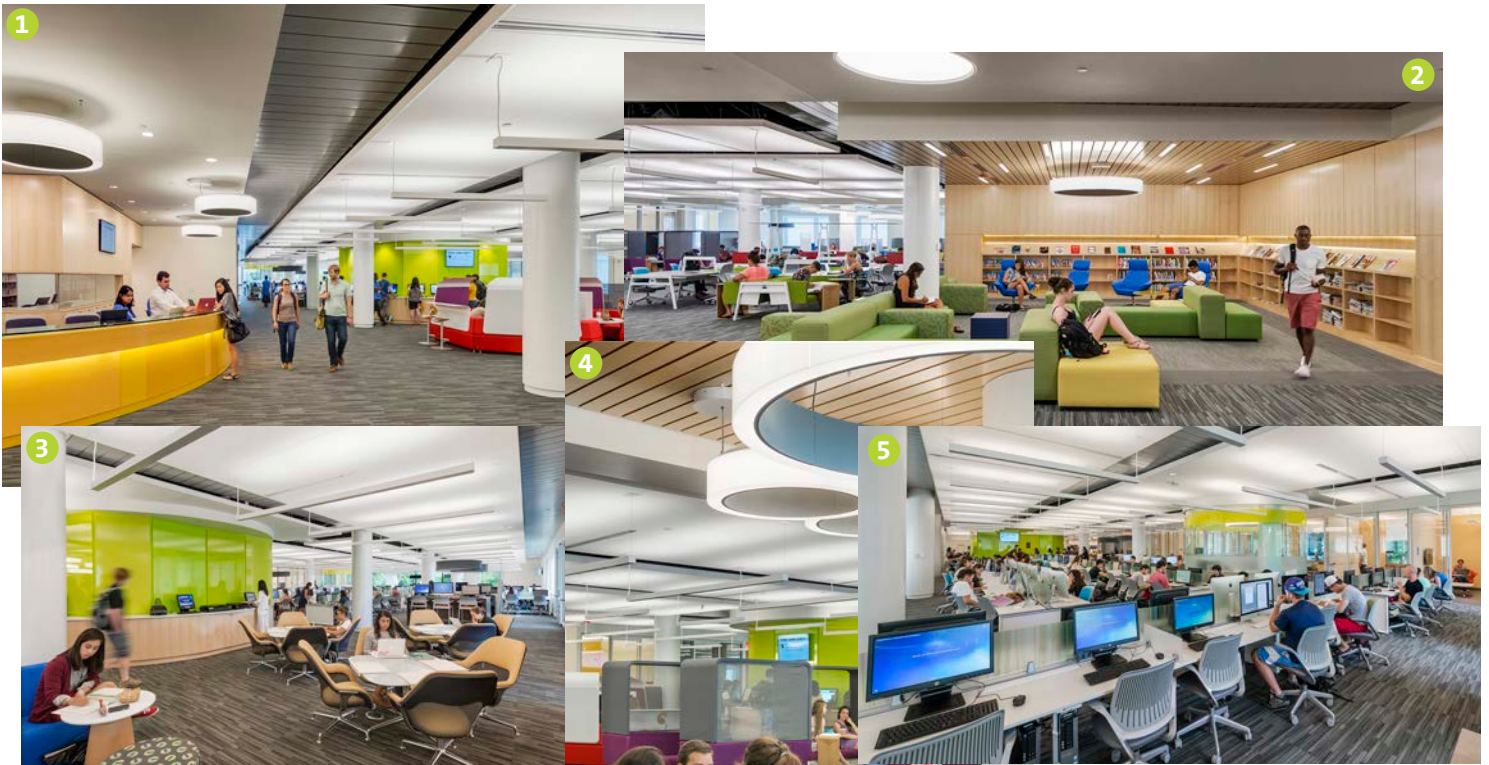
BY MARK ALLEN, AIA, LEED AP AND KEVIN TRIPLETT, AIA, LEED AP

**T**he role of the academic library has undergone radical transformation, with changes in the nature of scholarly communication, student learning, and media content. How do existing libraries respond to stay vital? A case study of the planning initiative and implementation for a Digital Media Commons at Northeastern University examines this question.

The planning for the university's Digital Media Commons grew from an effort to redefine the role of the existing Snell Library at the heart of the campus. An evolution in collections, services, technologies, and space use illustrated the need for a new vision—a need felt at similar academic libraries nationwide. Library changes were especially critical

at Northeastern, which was undergoing a broader evolution from a largely local university into a leading national research institution. Addressing the new academic profile, enrollment growth, and associated needs of students and researchers would be key components of the strategic initiative for the existing library.

Beginning in 2010, Northeastern's provost, dean of libraries, and director of information technology services initiated the development of a Digital Media Commons concept. The concept drew on scenarios for shifting the library from a role as accumulator of print editions and passive study, to a learning-centered environment supported by technology. With a print collection of nearly two million volumes—most of it in open stacks—the opportunity for recasting the space was substantial.



*Image 1: The result of bringing together key decision makers from different programs, the unified service desk anchors the Digital Media Commons and provides staffing for a range of technology, media access, and circulation services available 24/7. Image 2: The library's Hub is a reading area for popular and new materials. With wood paneling and display of print materials, the Hub provides an emotional connection to traditional library space. Images 3, 4, and 5: Flanked by collaborative rooms, the open plan commons offers flexible seating, computers, whiteboards, and monitors. Students have the option to work independently, in pairs, or in small teams.*

Library stakeholders—including librarians, information technology staff, and administrators—met to outline the framework for the concept and distributed their findings in a series of working documents and white papers to a diverse audience. This planning process identified both the services that would facilitate physical and virtual engagement with library users in revamped spaces, and the long-term storage options for print collections that would allow for the conversion of existing building areas. The project united key




decision makers from the library, Information Technology Services, the College of Professional Studies, and the selected design firm in support of an integrated Digital Media Commons.

Construction began in 2012 on a “prototype” to test the effectiveness of the overall concept as well as the specific technologies, services, and furniture components that would be incorporated into a broader library renovation. Based on positive feedback and assessments of the prototype, the University initiated the design and construction for nearly 100,000 square feet of phased renovations across four existing floors of the library to accommodate the new Digital Media Commons. The project transformed large floor plates from

traditional book stacks to flexible learning spaces with state-of-the-art media capabilities.

As an innovative model that supports collaboration in digital creation, design and analysis, Northeastern's Digital Media Commons reaches beyond the traditional library mission to include resources as diverse as 3D printing labs, an innovation center, and audio/video/post-production studios. By re-thinking established boundaries to exiting staff roles, the project provides an effective environment for digital media creation on campus.

Stakeholders and the design team also re-examined other existing operational and program relationships. For instance, classrooms that had been distributed throughout the library were relocated into high-quality space in a new dedicated classroom wing. Previously, classrooms located in library space caused security slowdowns as students attending classes passed through security turnstiles, a pro-



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Images 6 and 7: Media creation studios include a video recording studio with green screen, an acoustically isolated audio recording studio with control room, and post production environments. Image 8: The 3D Printing Studio offers a full suite of 3D fabrication and modeling technologies. Image 9: Classrooms accommodate both team-based and lecture-style formats. Students work together in a variety of group settings.

grammatical conflict. A separate entry to the new classroom wing eliminated disruption and bottlenecks.

The ground floor now includes one of the signature spaces of the library: a dramatic 10,000 square-foot open plan commons, with robust infrastructure for high density computing and printing. Flanked by collaborative rooms, the open plan commons offers flexible seating, computers, whiteboards, and monitors. In addition, 30 media-capable collaborative work rooms provide the tools and setting for students, faculty, and researchers to share content.

Other spaces throughout the Digital Media Commons provide diverse opportunities for new models of academic collaboration. Not only can students gather for individual

study, but they can also work in teams on content creation for assignments, including advanced graphics and geographic information systems. Faculty can gain technical guidance from the library staff on digital scholarship and methodologies for integrating media into coursework.

The facility's data analysis capabilities and computer-aided design tools, fully supported by librarians and information technology service experts, provide users with the ability to work across disciplinary boundaries and to explore innovations in media, design, and technology. By promoting content sharing in audio/video/post-production and 3D printing expertise, the Digital Media Commons at Northeastern creates a cooperative setting for a full range of interdisciplinary work. ■

**ABOUT THE AUTHORS:** Mark Allen, principal, and Kevin Triplett, associate, are architects at Wilson Architects in Boston, Massachusetts. They have collaborated with academic librarians on the planning, design, and construction process for dozens of library projects at campuses throughout the United States. Underlying their work is an interest in the role of technology in contemporary library environments. They can be reached at [mallen@wilsonarch.com](mailto:mallen@wilsonarch.com) and [ktriplett@wilsonarch.com](mailto:ktriplett@wilsonarch.com).

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Photo Credit: Anton Grassl, Esto Photographics

» **Flanked by collaborative rooms, the open plan commons offers flexible seating, computers, whiteboards, and monitors. In addition, 30 media-capable collaborative work rooms provide the tools and setting for students, faculty, and researchers to share content.**

# Successful Public Libraries in the New Information Age

» Guided by research and their patron's needs, public librarians adapt and adopt new technologies.\*

BY KHEIL MCINTYRE

As responsive civic institutions, libraries must continually expand the number of individuals and community groups they serve by developing and delivering resources as diverse as their patrons. In today's new information age, the public library system is tremendously well-positioned to use technology to do just that: expand access, improve core services, and offer new and better amenities. In doing so, libraries affirm an exciting, modern version of their historical mission at the center of public life.

Technology that expands patrons' access to tools to help them improve their lives and expand their horizons fits nicely with the realities of 21st century libraries. It empowers students and adult learners and meets the needs of diverse communities.

## SOMETHING FOR EVERYONE

According to a large-scale Pew Research Center survey,<sup>1</sup> ninety percent of respondents said that if their local library closed, it would have an impact on their community, major or minor. Tom Sloan, in his blog "What Makes an Award-Winning Public Library Successful," quotes Donna Dzedzic, former Executive Director of the Naperville (IL) Public Library. She says, "The ultimate measure [of success] is the community's opinion of the library," then modern public libraries are very successful indeed.<sup>2</sup> This also means, however, that libraries must provide a broad mix of community-oriented services to reflect the specific needs of those communities. They need to make sure that, as Michigan librarian Tera Moon, said recently, "there is something for everyone."

That phrase can mean "special activity corners" and "display areas that invite exploration," as Child Aid, an agency promoting social and economic develop-



ment through literacy, advocates.<sup>3</sup> Or it can be the "health kits" that Curtis Memorial Library of Brunswick, Maine, offers to childcare providers with a local hospital and medical center.<sup>4</sup> What "something for everyone" means, then, depends first and foremost on the specific needs of the communities being served.

Indeed, one of the more striking aspects of the Pew survey is how evenly split respondents were in naming the most important library services. Resources, programs for youth, programs for adults, and Internet, computers, printers were each voted "very important" or "somewhat important" by between 58 and 72 percent of respondents.<sup>5</sup> These results are a timely reminder that libraries serve the entire population, and that their patrons are in no way united in their wants and needs. Rather, everyone is a unique individual looking for something specific from his or her local library.

## A QUIET, SAFE PLACE

"Having a quiet, safe place" is the third highest ranked library service, Pew found, following only the core services of book lending and librarian assistance.<sup>6</sup> While

what "quiet" means is fairly clear, what makes a place "safe" is a deceptively simple concept. A good working understanding of a safe space means that the space is open and available to diverse community groups—adolescents after school, veteran job seekers, elderly social groups, or anyone else. In his article "Libraries as Safe Spaces," Shawn Vaillancourt notes what the Correctional Training Facility state prison in California demands in its three short library rules: "Respect each other, respect the library, be open to learning."<sup>7</sup>

## FOSTERING DIALOGUE AND EXCHANGE

Fostering dialogue and facilitating the free flow of information are overlooked roles of successful libraries. These concepts include—as the planning, design, and educational organization the Project for Public Spaces notes—fostering "dialogue and exchange" generally, as well as providing, for example, "translation services, literacy programs, foreign language classes, [and] English as a second language (ESL) tutors" to help new immigrants navigate society and establish themselves in the community.<sup>8</sup>

It also includes such wide-ranging

resources as expert lectures and adult education courses, music concerts and film screenings, art museum and historical society installations, and makerspaces and markets, among other offerings as diverse as the libraries' communities. While these resources can seem to stretch the definition of library services, they are simply extensions of libraries' core role as purveyors of information.

### THE WORKFORCE-ORIENTED LIBRARY

Of increasing importance among a library's offerings are job and career-related services. As Georgia's Live Oak Public Libraries Assistant Director for Public Services Jason Broughton notes, "There are more libraries than unemployment offices." This deficit opens the possibility of workforce-oriented library systems, such as Broughton's, making a major impact by providing services traditionally offered through state labor departments or community job fairs.

As Internet access continues to expand what "library services" mean, workforce-related resources for exploring career options and browsing job postings will remain among the most important resources that a library can offer. The Project for Public Spaces goes as far as claiming that libraries already "play a crucial 'think tank' role for local start-up businesses and community development advocates."<sup>9</sup> It's not difficult to imagine libraries of the future as aiding business and technology incubators by providing free and accessible job training along with career preparation resources.

### FREE, OPEN, AND VITAL

Central to the appeal of these services are twin realities. First, librarians are amazingly resourceful professionals who provide no-cost services for job seekers, such as advising on appropriate career paths and helping to use resume builders and interview prep tools. Second, having free and open access to the Internet breaks down the barriers separating qualified people from what they need to become successful job applicants.

In this way, librarians help produce a more economically and culturally diverse workforce by providing the public with access to job resources and career support.

Libraries themselves serve as "community anchor[s],"<sup>10</sup> in the phrasing of the Project for Public Spaces. And because they are so universally important, their accessibility and openness are broadly civic characteristics. "Libraries are more and more a gathering place—sometimes I think we have more coffee klatches in the library than at Starbucks," jokes Donna Dziedzic in Tom Sloan's blog. "Now and in the future, successful libraries must provide an environment...that people like and want to support."<sup>11</sup>

### EMPOWERING PATRONS

In adapting the technological advancements of the information age for the career development needs of a 21st century workforce by providing online resources such as *LearningExpress Library* and *Job & Career Accelerator*, libraries empower their patrons to build academic, computer, and workplace skills to do better in school and prepare for the careers of the future. These tools help users pass admissions, certification, and licensing tests to ensure that no barriers stand in the way of their personal and professional betterment. And they expand patrons' horizons, assisting them in preparing for and exploring careers, searching for jobs and setting up interviews.

Broughton has found that LearningExpress is "one of the most important and interesting electronic resources in my arsenal for outreach services," adding that it "is always the one thing that amazes many audiences in [the] breadth and depth of its content."

### HELPING LIBRARIANS HELP

Librarians are community- and service-oriented and, more than anything, want to help every patron as needed. Librarians help their patrons by providing a diversity of user-oriented tools, such as a resume builder that walks learners through the

process of writing a resume and applying for jobs, searchable resources that allow users to browse and find helpful services themselves, and self-directed computer skills tutorials that patrons can navigate to learn how to use popular software.

While librarians are often essential in assisting patrons in using this technology, the power of these tools is that anyone can use them, in their own time, at their own pace, be it in the library, at school, on the go, or at home. Indeed, "job seekers have the tools to make informed career decisions to achieve employment success," said librarian Jennifer Forman of Snohomish Library in Washington.

### FULFILLING COMMUNITY NEEDS

Committed to fulfilling community needs, public libraries must provide resources for learners of all ages and stations, from elementary school to adult education, offering, for example, commercial driver's licensing (CDL) practice tests alongside practice exams covering the National Council Licensure Examination (NCLEX) for nurses, academic preparation tools ranging from fourth grade poetry review to college-level calculus practice, and training in popular software and resume writing. The parallel to this breadth of services is depth of resources, including multiple practice tests for each exam so that users can track their improvement.

"In speaking to countless libraries, their staff, the general public, [the] Governor's office staff, state agencies, prison officials, ex-offenders, state officials, [and] our legislature, [many people were] simply amazed that these resource were available to them through our virtual library," says Broughton.

### FREE, EASY, AND CONVENIENT ACCESS

Regardless of the value of these resources, however, they wouldn't help anyone if they weren't so "free, easy, and convenient to access from library or home," says Michigan librarian Wendy Mutch when describing one of the core attractions of new technology in general.

In the library context, guaranteeing

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## » High-level resources and innovative delivery technologies have supercharged this process, empowering patrons to study, learn, and succeed in school and the workplace.

patrons anytime, anywhere access to test resources and e-books makes all the difference in the world, especially to those with limited mobility or who live in rural or isolated communities without alternate library or bookstore options; e-books, after all, can't be stolen, or damaged. "A nursing student came to the library wanting a nursing exam prep book," remembered Steve Axtman, a librarian at the North Dakota State Library in Bismarck, a small and relatively isolated city of about 70,000 people. "I showed her how to access the tests in through the *Learning-Express Library*, she was delighted to start preparing immediately, instead of waiting for an interlibrary loan."

### SUPERCHARGING THE MODERN LIBRARY

In a new technological world, libraries are experiencing a quiet renaissance. Demonstrating their incredible utility and capacity for growth, library usage skyrocketed in the aftermath of the global financial crisis of 2007-2008 as newly unemployed and underemployed patrons made use of their resources—especially those related to job readiness.

Since then, patronage numbers have stabilized. A 2012 national report by the Institute of Museum and Library Services surveying 17,000 public library outlets in the United States showing an increase in physical visits of nearly 21 percent over 10 years, and a 28 percent increase in circulated materials in the same period. The numbers related to new technology lending are even more impressive as e-books circulated at nearly 1,800 percent of their 2002 totals, accounting for around nine percent of all materials lent nationwide currently, and are

now available in about two-thirds of all public libraries.<sup>12</sup>

By using new technologies and aligning their missions to be responsive to patrons, libraries can cement their positions at the center of 21st century civic life. Offering services for everyone who wants them, libraries nurture the information exchange that is critical to any free and open society. And by offering workforce and career development resources, they allow individuals and groups to improve their positions and expand their horizons.

High-level resources and innovative delivery technologies have supercharged this process, empowering patrons to study, learn, and succeed in school and the workplace. By expanding the tools at their disposal, librarians can provide resources as diverse as the communities requesting them, opening anytime, anywhere access to entire new categories of patrons, ensuring that future libraries will only become more robust in their offerings, and more important to their societies. ■

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**ABOUT THE AUTHOR:** Kheil McIntyre is the general manager and chief operating officer of LearningExpress, an EBSCO company. He has more than 25 years of experience in media, Internet/film, and technology, and has spent the past eight years with LearningExpress. He is passionate about the potential of LearningExpress' platforms to level the playing field of learning as well as the future of the public library as a digital and cultural hub.

### FOOTNOTES:

<sup>1</sup> Kathryn Zickuhr, Lee Rainie, Kristen Purcell, and Maeve Duggan, *How Americans Value Public Libraries in Their Communities*, Pew Internet and American Life Project (Washington, D.C., Pew Research Center, 2013), 2. <http://libraries.pewinternet.org/2013/12/11/libraries-in-communities>.

<sup>2</sup> Tom Sloan, "What Makes an Award-Winning Public Library Successful," Public Libraries Online (blog), April 26, 2013. <http://publiclibrariesonline.org/2013/04/what-makes-an-award-winning-public-library-successful>.

<sup>3</sup> "Characteristics of A Successful Library," *Child Aid*. <http://child-aid.org/characteristics-model-library>.

<sup>4</sup> "How to Make Your Library Great," *Project for Public Spaces*. <http://www.pps.org/reference/libraryattributes>.

<sup>5</sup> Pew, p. 3.

<sup>6</sup> Pew, p. 2.

<sup>7</sup> Shawn Vaillancourt, "Libraries as Safe Spaces," *American Libraries*, December 11, 2012. <http://americanlibrariesmagazine.org/2012/12/11/libraries-as-safe-spaces>.

<sup>8</sup> Project for Public Spaces.

<sup>9</sup> Project for Public Spaces.

<sup>10</sup> Project for Public Spaces.

<sup>11</sup> Tom Sloan blog.

<sup>12</sup> Deanne W. Swan, Timothy Owens, Kim A. Miller, J. Andrea Arroyo, Terri Craig, Michael Freeman, Natasha Isaac, Patricia O'Shea, Regina Padgett, Peter Shilling, *Public Libraries in the United States Survey: Fiscal Year 2012*, Institute of Museum and Library Services (Washington, D.C., Institute of Museum and Library Services, 2014), 9, 47. [https://www.ims.gov/sites/default/files/legacy/assets/1/AssetManager/PLS\\_FY2012.pdf](https://www.ims.gov/sites/default/files/legacy/assets/1/AssetManager/PLS_FY2012.pdf).

# Improving Patron Web Accessibility

» Libraries can become more inclusive and deliver on the promise of the ADA by aiding persons with disabilities.\*

BY MARC ZABLATSKY AND DAVID YOUNG

For nearly two decades, Flory Barringham taught people with visual impairments how to use computers. She often brought her clients to public libraries, where she found state-of-the-art technology installed on public computers.

As information is increasingly shared through the Internet and computer technologies, libraries have come to play a crucial role in ensuring that people of all abilities can access that information. For people who are blind or have low-vision, gaining access to the Internet typically means using adaptive technologies, including text-to-speech software and screen enhancement methods.

For years, however, Barringham watched her clients struggle to master those complex, highly specialized software programs. “Some of them felt it was too complicated to learn,” she says. She watched the librarians struggling, too. “Librarians have very expensive equipment, but it takes a lot of training for them to be able to help people [use it], and when it breaks, they don’t know how to fix it,” Barringham says. “So when they get patrons who are blind, they often feel frustrated because they don’t know how to help them.”

Legally blind from birth, Barringham holds a master’s degree in rehabilitation teaching. From 1996 to 2014, she worked with blind and low-vision Americans through the Massachusetts Commission for the Blind and the Carroll Centre for the Blind.

She has tried and tested most assistive technologies, so when developers at Ai Squared were ready to market a new technology called Sitecues, they called her to give it a try. “Wow. One word, wow,” Barringham says of the software. “It’s flexible. It’s not hard to learn. Compared to the other software out there, it’s very, very easy...Not just for me, but

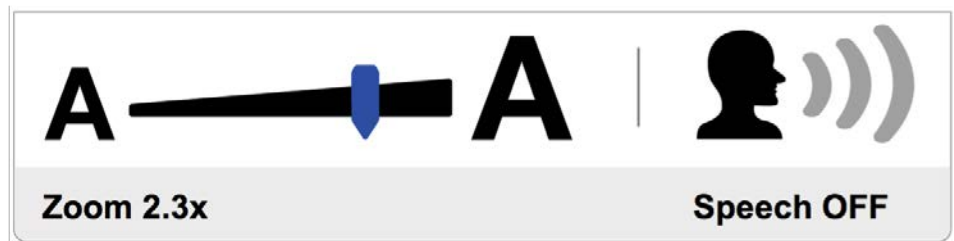


Figure 1: Sitecues user interface

for the people I serve.”<sup>1</sup>

Sitecues software not only helps people with low vision, but also aids the millions of people who struggle with other forms of print disability. The software is built directly into a website, online content, or browser, which makes it easily accessible to all. Also, individuals don’t need special training to use the software: by hovering the cursor over the Sitecues badge, the user can customize the view. Patrons can increase the font size, change color contrast, and engage text-to-speech, which uses a natural voice to read website content to the visually impaired. Users can also make reading easier by clicking on a section of text, which enlarges the chosen section and brings it into relief against a dark background.

The goal was to make Sitecues as easy to use and as intuitive as a light switch (see Figure 1).

## RESEARCHING SOLUTIONS

Ai Squared has a long history of successfully serving people with diverse abilities. The company began working with assistive technology for the visually impaired in 1987 and developed the Sitecues software in 2012 after CEO David Wu joined the team.<sup>2</sup>

Wu knows how challenging low vision can be. His wife became blind in one eye after a collision, and his father lost some vision when a child flew a toy helicopter into his eye. People in his family generally live long lives, so he has also seen relatives

struggle with age-related vision loss.






Shortly after joining Ai Squared, while reviewing sales data from the company and its industry, Wu stumbled onto a perplexing statistic: 95 per cent of Americans with low vision who could benefit from assistive technology were not using it.

He found this statistic most troubling. The company’s flagship product, ZoomText, a screen magnification product, was still failing to address the needs of most people with print disabilities he reasoned. ZoomText is software that must be purchased, installed on each individual computer, then mastered and upgraded over time. These steps reduced the potential reach and benefit that Wu and his team wanted to provide.

According to a U.S. National Health Interview Survey on Disabilities, 1.3 million U.S. citizens are legally blind, and they are the people who are most likely to seek out assistive technologies. The U.S. Census, however, estimates that 20.6 million American adults live with non-correctable vision loss.<sup>3</sup> And, during the next thirty years, that number is expected to double as baby boomers age (see Figure 2). Most of these people are currently underserved by assistive technology.

## WHAT ABOUT THEM?

“We are the leader for people with low vision, but less than five per cent of the people who could benefit were using our software,” Wu says. “I was surprised, and started to ask: Why can’t we build a product

Populations with Print Disabilities		
 LOW VISION	9%	Includes blind and non-correctable low vision
 LEARNING DISABILITIES	15%	Includes dyslexia, ADHD, autism
 LOW LITERACY	21%	Individuals reading below 5 <sup>th</sup> grade level
 NON NATIVE SPEAKERS	5%	English-as-a-second language (ESL)
 SENIORS & BOOMERS	39%	Includes the 50% of seniors with one or more diagnosed disability

**All percentages based on US population**

Source: US Census, American Community Survey, National Institute of Health, National Adult Literacy Survey, National Health Interview Survey

Figure 2: Populations with Print Disabilities

that has a mass audience? How do we accommodate anyone with a print disability who is coming to a website?”

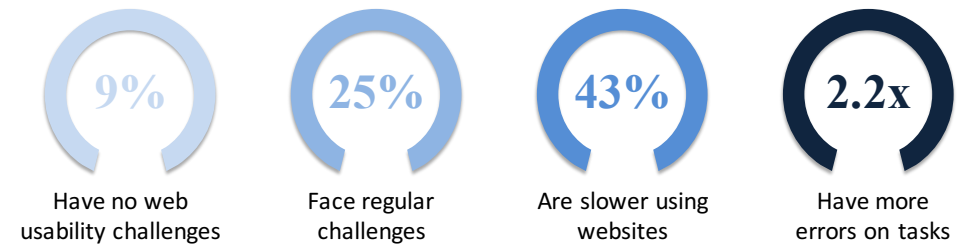
A few years later, an outside study confirmed Wu’s intuition that website developers were missing the mark with older Internet users. In 2013, the Nielsen Norman Group discovered that web users over 65 were 43 percent slower in their facility with online resources than their younger counterparts (see Figure 3).<sup>4</sup> Older users blamed themselves for being slow, but researchers concluded that if companies redesigned their websites to give older users the same experience as younger users, they could expect 35 percent more business.

“The answer was to embed zoom and speech enhancements into the website itself, so anyone who comes to the website will have access to the tool,” Wu says. “If you make this tool easy to use, then it can help more people—someone who is aging, someone with dyslexia—anyone.”<sup>5</sup>

Wu began to talk about these ideas with assistive technology pioneer Aaron Leventhal. Twenty years ago, when he was a college student in Wisconsin, Leventhal happened upon an old house in the middle of campus with a sign hanging outside that read: “Computers To Help People.” He went in.

Inspired by the work he saw these innovators doing, Leventhal devoted his life

## Web Usability Challenges for Seniors



Source: Ai Squared, Nielsen Norman Group

Figure 3: Web Usability Challenges for Seniors and Baby Boomers

to making computers accessible to people with diverse abilities. He has worked on accessibility projects with mainstream firms such as IBM, Research In Motion, Mozilla, and Netscape.

Leventhal believes that Sitecues marks a dramatic shift in the world of assistive technology.<sup>6</sup> “First, instead of serving the small number of people who know and acknowledge their disabilities, it serves everyone—people who have some vision loss or any difficulty with reading and who need some help,” he says. “Second, the old paradigm in the industry was to build the bridge halfway to the user and make it possible for people to get help only if they have the software and expertise to use it. Sitecues takes a different approach. It embeds the technology into the website, is free for the user, and emphasizes simplicity and ease of use.”

It took Leventhal and four other developers three full years to build Sitecues. “The user sees something very easy, but it’s very powerful,” he says. “It had to be welcoming, so it has a lot fewer buttons. It introduces itself to you, with a few options, and as you go, it teaches you more. It is as simple as a light switch.”

### TECHNOLOGICAL ADVANCES

Much of the technology in Sitecues was not available even five years ago, Leventhal notes. To make sure the software is intuitive and easy to use, developers gathered groups of potential users and watched them use the software, noting each time they stumbled or became confused.

For example, Leventhal notes that older users often experienced hand tremors that made it difficult to position the mouse cursor correctly. As a result, the Sitecues cursor automatically gets bigger when it is

engaged. The goal of the user groups, according to Leventhal, was to address every single hurdle they encountered. “The key to good design is to build a product after you figure out who is going to use it,” he adds.

### ACCESSIBLE TO ALL

The software is ideal for libraries, because it is designed to promote inclusion in the broadest possible sense. “Libraries over the past twenty years have gone digital,” observes Wu. “It only makes sense that they accommodate their entire community.”

Libraries have a mandate to meet the full spirit of Section 504 of the U.S. Rehabilitation Act, which ensures that Americans with disabilities have equal access to federally-funded programs and services.

Many consider that mandate to be met if a website meets the Web Content Accessibility Guidelines, or WCAG 2.0 AA. But that conclusion is troubling if users need to own and master complex assistive technologies to benefit from WCAG compliance on a website.

The developers at Ai Squared believe that WCAG is just the beginning of true accessibility and usability, and that Sitecues gets libraries closer to the true goal, which is to make information genuinely available to all.

“Libraries are public organizations,” Wu says. “Since they’re serving everyone, they want to include everyone, because it’s a community center. A library’s website, online catalogs, and content are among its most valuable assets,” he says. “And print disabilities are a major barrier to the full enjoyment of these assets.”

The software has already been tested and deployed at dozens of libraries, including public, academic, and specialized libraries, along with library networks (see Figure 4). For example, in 2015, The New Jersey State Library embarked on an ambitious program to better serve not only patrons with vision impairments, but also

**For additional information, see “Dispelling the Top 5 Myths of Library Web Accessibility,” Sitecues presentation at the American Library Association Conference, January 2016: <https://www.youtube.com/watch?v=PsiLWq2u4Pw>**



## Library Implementations of Sitecues

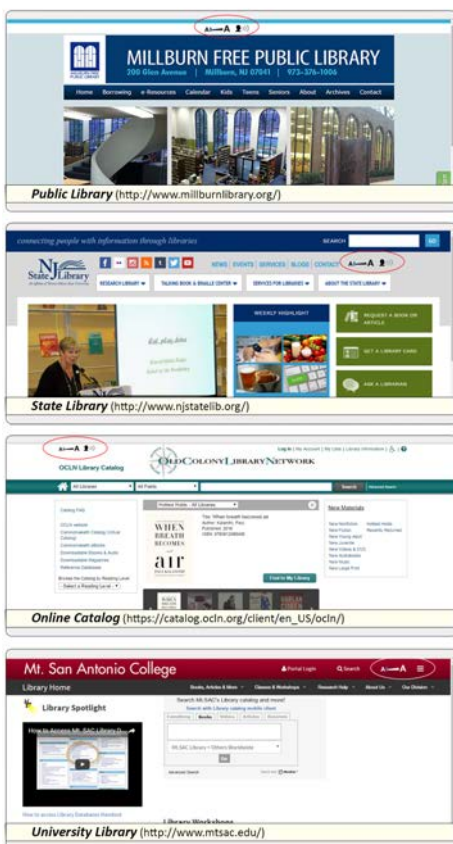


Figure 4: Implementation of Sitecues in Libraries

people with reading disorders like dyslexia and those who need reading assistance because of brain injuries or strokes.<sup>7</sup> With a grant from the Comcast Foundation, the library evaluated a number of technologies, but found that few achieved broad reach and usability. The magnification option on free software such as Google Chrome was too hard to find, and images became fuzzy when they were magnified.

Outreach coordinator Mary Kearns-Kaplan says the organization settled on Sitecues because it was simple, intuitive and easy to use. “We see the enormous applications of Sitecues,” she says. “The need is here, and it’s only going to grow, for the public to more easily browse the Internet.”

### WORKING ON THE WEB

Internal Sitecues studies show that 10 percent of website traffic takes advantage of its zoom or speech features when it is installed on a website, and that figure rises as patrons become more familiar with the accessibility options (see Figure 5). The software can be added to any website or online library catalog without a redesign or can be added to web browsers and shared among computer terminals.

## Sitecues Usage Statistics

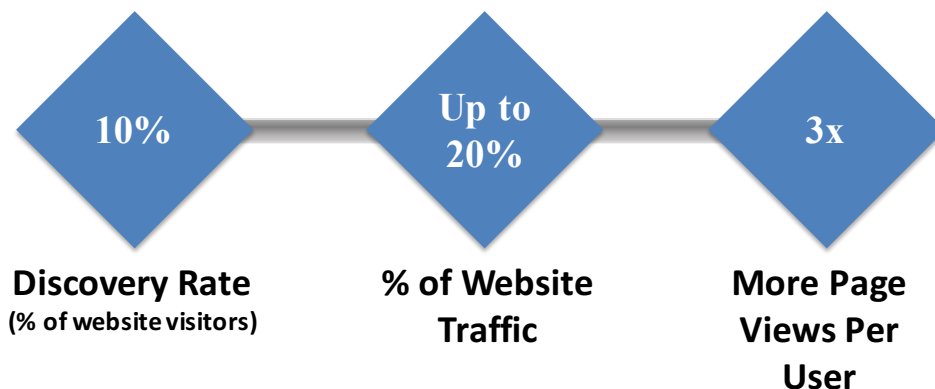


Figure 5: Sitecues Usage Statistics

Sitecues is also software as a service, or SaaS, which means a library can purchase an ongoing subscription to the program. Some benefits of SaaS are that maintenance and updates are automatic and included in the subscription price, avoiding the need for time-consuming and costly updates. Subscription pricing is flexible to accommodate any size library, from single branches to a large consortium.

David Slater is the executive director of the Old Colony Library Network, a cooperative of 29 libraries serving 300,000 patrons on the south shore of Massachusetts. He heard about Sitecues from a visually-impaired patron and quickly adopted it across all of the member libraries. “Right off the bat, the library directors really saw the need and the benefit... It was one of those decisions that didn’t take a lot of debate or discussion,” Slater says. “They saw it, they got it, the price was reasonable.”

One of the challenges Slater faced was that the cooperative’s web-based library catalogue is proprietary and hosted remotely, so the libraries don’t have a lot of options for customization. And the organization doesn’t have any developers on staff. “But [Sitecues] provided a very easy-to-implement solution,” he says, noting it took 15 minutes to install the software on the sites. Slater also says that the software is intuitive, so library staff didn’t require a lot of training.

“People—staff and patrons—got it immediately,” he says. “It’s just another tool that library staff can show to their patrons, to improve access. That’s what we’re after. We want people to use our services.” ■

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### FOOTNOTES:

- Video interview with Flory Barringham: <https://www.youtube.com/watch?v=E7elIELYkMM>
- Video interview with David Wu: <https://m.youtube.com/watch?v=DGCw48M8MHU>
- Low vision population statistics, American Foundation for the Blind: <http://www.afb.org/info/blindness-statistics/adults/facts-and-figures/235>
- Nielsen Norman Group study on web usability for seniors: <https://www.nngroup.com/reports/senior-citizens-on-the-web/>
- Ai Squared research on usability challenges for web users over 50: <https://www.slide-share.net/mobile/sitecues/website-usability-challenges-among-older-web-user>
- Video interview with Aaron Leventhal: <https://m.youtube.com/watch?feature=youtu.be&v=ybwxVrGCzPQ>
- NJ Libraries Expand Web Accessibility for Residents with Low Vision and Reading Disabilities: <https://www.tapinto.net/towns/edison/articles/nj-libraries-expand-web-accessibility-for-residen-5>

### ABOUT THE AUTHORS:

Marc Zablatsky and David Young are part of the Sitecues team at Ai Squared. Zablatsky is Vice President and General Manager, with more than 20 year of experience with entrepreneurial companies that leverage technology. He holds a BS from Babson College and an MBA from Harvard Business School. He can be reached at [mzablatsky@aisquared.com](mailto:mzablatsky@aisquared.com).

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# Lessons in Library Leadership

» **By aligning strategic, tactical, and operational plans, leaders can keep their libraries focused on achieving realistic goals and objectives.\***

BY COREY S. HALAYCHIK

**T**o be successful, libraries need to engage in behaviors that allow them to establish and support efforts to succeed. The main way this goal is accomplished is by participating in a planning process that provides focus to employees and ensures that everyone’s efforts support the library’s overall mission.

The intended outcome of planning is, of course, to move the library into a more favorable position than it was previously. Planning doesn’t magically occur though, and it is up to leaders to engage in a planning process.

The level of involvement an individual leader plays in the planning process will depend on one’s authority and job duties. All leaders, however, will engage in some form of planning and should understand what the process entails. This task can seem overwhelming given the complex nature of planning.

Planning doesn’t need to be scary or complex. But successful planning requires understanding some basic concepts and practicing some key behaviors, which if followed can make the process not only manageable but also enjoyable.

## PLANNING BASICS

All plans are created through a series of stages that move a plan along the creation process. The stages include:

*Data collection*—this stage involves gathering information that will inform planners on the direction the plan should take. The specific information gathered will vary depending on the type of plan being formulated, but examples include articles or reports on current trends, statistics, and past planning documents.

*Analysis and discussion*—in this stage, a planning group combs through the collected data for trends or hints on the plan’s

**Table 1 Improving goal statements**

Increase awareness of the library’s resources and services by developing and conducting a comprehensive marketing campaign aimed at rebranding the library, updating all electronic and social media sites, and developing mobile apps for library users to discover resources and manage their user accounts.	Increase awareness about the library’s resources.
Strengthen the ability of the library to support research by securing and expanding access to essential research databases and journals, increasing access to data mining and analytics tools, and world class facilities that support the degree programs and research focus areas of faculty.	Strengthen library services to support research.
Recruit, train, and develop a staff of highly trained librarians and support staff that possess the necessary skills to aid the library in being able to meet the current and future needs of our users.	Develop a versatile staff.
Actively seek out and develop collaborative relationships with all campus departments that use library resources or that support library services as a means to create positive user experiences.	Cultivate collaborative relationships that benefit library users.

focus. Trends, along with ideas on what direction the library would like to go, are discussed and debated until a consensus on the plan’s direction is agreed upon.

*Drafting and release*—this is the stage where the plan is written, approved, and shared with stakeholders. The plan should be written clearly to remove any ambiguity and tied into the larger library mission. Rollout of the plan should involve communication to everyone who will be affected or play a role in the success of the plan.

*Execution and evaluation*—the final stage of the process sees the plan being carried out and assessed for effectiveness. All plans should include a timetable and some way to measure outcomes. These items are reviewed when the plan has run its course and become part of the data used for future planning.

## TYPES OF PLANS

Strategic planning represents the highest level of planning. This is the “big picture” planning that is typically the responsibility of persons holding the highest levels of authority within a library. Some libraries may choose to have a committee comprised of employees at various levels draft a strategic

plan, but they will certainly receive input from the top. The director, dean, or CEO will have final approval, and their direct reports will be charged with its overall execution.

Strategic plans communicate why a library exists, where it is headed, and when it will get there. How it will get there, beyond the occasional broad statement, is addressed in plans drafted at lower levels. Strategic plans are also designed to plot the course for the next three to five years.

The library’s strategic plan will also inform lower-level planning by identifying action items and setting goals and objectives. Additionally, the plan delineates how particular departments or units fit into the bigger picture. Knowing these details can be extremely helpful when asking for additional resources such as funding, tools, or personnel.

Library staff members may be asked to serve on a strategic planning committee or supply data to the strategic plan process. An overview of the action steps in a strategic planning process follows.

*Data collection*—for strategic planning, this phase mainly focuses on a scan of the operating environment of the library such as determining what internal and external factors are likely to affect the library for the

**Table 2: Sample tactical plan**

Tactical statement: Rebrand library	Responsible unit	Resources	Start date	Benchmarks	Completion date
<b>Objective One:</b> <i>Gather feedback on current branding efforts.</i>	Assessment office	\$5000 for focus group incentives; Library vehicle for branch visits; Reserved use of Classroom A for length of assessment activities	9/5/16	Focus group completion; Report on findings	12/2/16
<b>Objective Two:</b> <i>Redesign the library's logo.</i>	Marketing— Graphic Design Unit	No additional	12/12/16	Round one of designs; Round two of designs;	3/3/17
<b>Objective Three:</b> <i>Update library's website.</i>	Information and Technical Support Department	No additional	3/6/17	Final round of designs; Final design Website branding updated	3/17/17
<b>Objective Four:</b> <i>Update marketing material.</i>	Marketing— Graphic Design Unit	\$20,000 for printing costs; Use of courier for shipments to branch locations	3/6/17	New logo added to material; Files sent to printer; New material received; New material sent to branches	4/7/17

timeframe of the plan. In the case of libraries, this review can include trends in usage, funding data for available grants and donation prospects, and articles related to how libraries are perceived.

Gathering past strategic plans, plans from similar libraries or ones that stands as a good example of the plan's goals is a good idea. Also gathering copies of a university strategic plan or plans from ALA strategic partner libraries can help as well. Surveys and focus groups can also be good tools to use at this stage.

Lastly, the library's mission and vision statements should be examined. The goal is to gather different pieces of an information puzzle that can help create a picture of what the environment will look like and what expectations the library might have to live up to in the years to come.

*Analysis and discussion*—because of their far-reaching status, strategic plans are usually worked on by a committee. In the case of analysis and discussion, the committee meets to review the data that has been collected, discuss the picture the collected data paints, and form a series of targets that the library will aim for. This process can and often should be lengthy. Remember, this plan is going to drive the organization's goals and

objectives for several years, so it is critical to give it the time and attention it deserves.

*Drafting and release*—this stage involves transforming the targets agreed upon in the previous stage into broad goals that provide a guiding direction without stating how to get there. For example, a goal of “provide access to library services that meet the demands of our users” is better than “provide access to copiers, computers, and research space that meet the demands of our students and faculty.”

Clarity is also important when drafting the plan. If a statement is confusing, it should be reworked until it makes sense. The goal should be to craft shorter statements that leave little room for interpretation for what the desired outcome is but leave the door open once that outcome is achieved (see Table 1).

Once the strategic plan has been written and approved, it needs to be communicated to stakeholders. This step can be accomplished in a variety of ways and should be handled differently depending on how the stakeholders are related to the library.

Sharing the plan with employees first through emails gives these stakeholders an opportunity to review it and record any questions they might have about it. Meet-

ings should be scheduled to allow those questions to be addressed and to encourage open dialog about what the plan means for the organization's future.

External stakeholders should be given access to the plan on the library's website.

Execution and evaluation—once the strategic plan has been announced, it is up to the library's leaders to execute it. This process is accomplished by formulating lower level plans, setting goals, and directing efforts in support of the strategic plan's objectives. Evaluation occurs in two forms. First, periodic evaluation will occur as lower plans run their course. A second form of evaluation occurs near the end of the plan's lifecycle as it becomes data for the next strategic plan. The strategic plan's success and failures should be summarized and shared with employees at all levels of the library.

**TACTICAL PLANNING**

Narrower in scope than strategic plans, tactical plans populate the middle ground of the planning landscape. They add substance to the broad objectives and goals listed at the strategic level while simultaneously maintaining a great deal of flexibility for those needing to plan the execution of the library's work.

**» Clarity is also important when drafting the plan. If a statement is confusing, it should be reworked until it makes sense. The goal should be to craft shorter statements that leave little room for interpretation for what the desired outcome is but leave the door open once that outcome is achieved.**

# Sample Strategic Plan: Cotter Library

## Our Vision Statement

A library that enriches lives, the community, and the world.

## Our Mission Statement

We empower our users by providing access to world-class physical and digital collections and innovative services supported by a diverse workforce, robust facilities, inclusive policies, and strong community partnerships.

## Strategic Goals

**#1.** Provide resources that support the full range of our users research needs.

### Objectives

1. Provide comprehensive access to collections across a diverse range of subjects through a combination of targeted acquisitions, collaborative partnerships with libraries, and more effective license terms.
2. Ensure longevity of the library's physical collection by ensuring its long-term preservation and conservation.
3. Provide ways for users to provide insight into how we might best support their needs.
4. Increase access to the library's special, audio, and video resources.
5. Strengthen our sustainability by adapting, evolving, and innovating.

### Objectives

1. Seek out and institute new collaborations across the library to maximize our existing capabilities.
2. Redesign existing space to better meet current and future needs of our users and staff.
3. Leverage existing technology investments in new ways.
4. Ensure that our current policies and procedures help our staff provide excellent service.
5. Foster a stronger sense of community through outreach and engagement.

## Objectives

1. Partner with community institutions to increase the library's footprint beyond its doors.
2. Provide a safe and welcoming environment for all members of the community.
3. Increase the diversity of our outreach and skills training programs.
4. Create an outlet for library staff, individuals, and libraries to exchange knowledge on topics that interest the community.

## COTTER LIBRARY COLLECTIONS DIVISION

### TACTICAL PLAN

#### Tactical Goals

**#3.** Develop a collection development plan that maximizes buying power and leverages existing reciprocal agreements.

### Objectives

1. Gauge effectiveness of existing collection development plan. (Strategic Goal One/Objectives: 1, 2, & 4)
2. Gauge effectiveness of existing reciprocal agreements. (Strategic Goal One/Objectives: 1 & 4)
3. In conjunction with appropriate stakeholders, develop alternatives to existing collection development plan. (Strategic Goal One/Objectives: 1 & 4)
4. Rollout new collection development plan. (Strategic Goal One/Objectives: 1, 2, 3, & 4)
5. Increase access to research material by reducing the time it takes to acquire and renew resources.

### Objectives

1. Develop more efficient workflows for acquiring materials. (Strategic Goal One/Objectives: 1 & Strategic Goal two/Objective: 4)
2. Develop more efficient workflows for renewing electronic materials. (Strategic Goal One/Objectives: 1 & Strategic Goal two/Objective: 4)
3. Ensure that workspaces are flexible

enough to support current and future requirements of processing collections material. (Strategic Goal two/Objective: 2)

4. Increase transparency of Collections Division activities among internal and external library stakeholders.

### Objectives

1. Develop a Collections Division education and outreach program. (Strategic Goal Three/Objectives: 3 & 4)
2. Develop a method to share with and solicit input on collection policies from stakeholders. (Strategic Goal One/Objective 3)
3. Investigate ways of sharing license agreement terms and budget data with stakeholders. (Strategic Goal One/Objective 3 & Strategic Goal Three/Objective 4)

## COTTER LIBRARY COLLECTIONS DIVISION: ELECTRONIC RESOURCES UNIT OPERATIONAL PLAN

### Operational Goals

Increase transparency of electronic resources acquisitions and renewal process by harnessing the power of existing communication tools and identifying new avenues for sharing information. (Tactical Goal Three/Objective 3)

### Objectives

1. Upload copies of license documents to the library's ILS for every licensor.
2. Attach every licensed product in the ILS to the appropriate license.
3. Consult with subject specialists and interlibrary loan librarian to determine which licensing terms to display in ILS.
4. Select appropriate license terms to display in ILS.
5. Document and evaluate current methods of sharing electronic resources acquisitions and renewal workflows and updates for usage and helpfulness.
6. Aid in the retention and cancellation review of resources by increasing the

Tactical plans are used to give guidance to specific areas of a library on how to meet the objectives and goals laid out in the strategic plan. They establish who is responsible for achieving each objective and provide guidance on timetables and resource allocations.

The responsibility for creating tactical plans is usually placed with individuals

who have access to funding and have the authority to assign personnel and material resources as needed. Depending on the size of the library, this can mean that tactical plans are drafted by lower-level administrators (assistant directors or associate deans) or middle managers (unit managers or department heads).

More commonly, the plan is created with input from subordinate leaders—for example, the head of branch libraries asks for input from each branch manager. Participation helps create buy-in from lower-level leaders who will be responsible for making success happen.

Timetables for tactical plans should

availability of usage statistics for subject librarians, Research Collections team members, and other stakeholders. (Tactical Goal Three/Objective 1)

### Objectives

1. Document current procedures for obtaining, maintaining, and sharing usage statistics.
2. Consult with subject librarians and Research Collections team members to determine what changes to current procedures are desired or would be helpful.
3. Determine what recommended changes or desires are possible with current infrastructure and capabilities.
4. Implement “doable” changes and develop plan for addressing recommended changes that will require additional training, personnel, or resources.
5. Aid in increasing access of electronic resources to users by reducing the time it takes to process new orders and reduce lapses in access during the renewal process. (Tactical Goal Two/Objectives 1 & 2)

### Objectives

1. Document current procedures for processing new electronic resources requests and renewals.
2. Consult with Electronic Resources Unit staff to identify areas of waste, redundancy, and opportunities for streamlining processing for new orders and renewals.
3. Develop tracking method for measuring completion times for processing of new orders and renewals.
4. Implement changes based on consultation to increase efficiency of the new order and renewal process.
5. Track new orders and renewals to determine if changes are increasing efficiency and make adjustments as needed.

reflect how long it will realistically take to complete tasks the plan is attempting to achieve. But tactical plan timetables will always cover a shorter span of time than a strategic plan, generally from a few months to one year.

*Data collection*—in creating a tactical plan, leaders will want to narrow the scope

of information they collect. Specifically, data related to a department’s current and future levels of resources (financial, material, and human) and any existing projects or goals that are being worked on should be collected. It is also a good idea to gather similar information from departments that will share responsibility or affect successful outcomes.

*Analysis and discussion*—typically the most time-consuming stage, data is analyzed with the purpose of gaining a complete picture of what the operating environment looks like. This information allows the tactical plan to address obstacles that stand in the way of achieving objectives or goals and to exploit any opportunities that can help ensure success.

*Drafting and release*—this stage involves listing the objective or goal being focused on and creating a statement that addresses how the tactical plan will contribute to its achievement. Additionally, each tactical statement should be accompanied by a breakdown of each specific task that needs to be accomplished, information on resources needed to accomplish the task, and a timetable listing a start date, any benchmarks, and an end date (see Table 2).

Once the tactical plan has been created, it is ready to be shared with pertinent individuals within the library. Again, a rollout meeting with those involved provides an opportunity for open discussion so staff can begin thinking how they will contribute to the plan’s success.

The plan should also be shared with other leaders within the library so they can see where focus is being placed and look for opportunities to support and work toward common goals.

Execution and evaluation—the final stage sees the tactical plan being implemented. Lower-level units and departments will use the plan’s content to draft operational plans and begin the process of working toward completing the tasks listed in the tactical plan. Leaders will use the timetable listed for each task to evaluate performance. Including benchmarks in timetables is crucial to keeping progress moving along. So, too, are regular meetings with the operational leaders charged with carrying out the tasks.

Adjustments to the plan may be necessary depending on other issues that pop up, such as emergencies, drastic shifts in available resources, unexpected setbacks, or new opportunities. Adjustments should be made in an orderly fashion, which allows the tactical

plan to stay relevant despite revisions. As with all plans, it should be evaluated for overall effectiveness once it has run its course. The plan can be used to make informed decisions about other plans and as a case study for what did and didn’t work.

### OPERATIONAL PLANS

Operational plans occupy the lowest tier of planning and address how objectives will be achieved. They are created at the lowest possible level within the library and focus on accomplishing a specific task.

Good operational plans are very detailed, describing exactly how the tasks outlined in the tactical plan will be accomplished on time with the resources allocated. The plans exist to establish what daily life will look like for staff such as assigning specific tasks to individuals, creating new policies or procedures, allocating specific resources, and creating and evaluating performance measurement tools.

Because this type of plan deals with the nuts-and-bolts of operations, they should be created by individuals occupying the lowest levels of leadership within a library. They know the people, the realities, and the flow of the work being performed and, as such, are best suited to draft plans that can leverage their unique situation to effectively complete tasks.

The length of an operational plan will depend on the circumstances surrounding the task being pursued. That being said, the plan should definitely include a timetable that is related to the task’s deadline in the corresponding tactical plan.

*Data collection*—the nature of operational plans means that leaders should focus only on the data related to the successful outcome of the task being pursued. As information professionals, librarians appreciate having access to a lot of data, and it can be easy to want to collect every piece even remotely connected to what is being worked on. Library leaders must resist this temptation and set parameters for what they will collect.

Well-researched and well-written strategic and tactical plans can help with this process as they should have already performed the lion’s share of data collection efforts. So, new data collection should be focused on items that will directly affect an outcome.

*Analysis and discussion*—data analysis is should go much more quickly when creating an operational plan because of the smaller amount of data being analyzed and the narrower focus of the plan. Similarly, discus-

**Table 3: Sample operational plan**

Objective: redesign the library's logo	Responsible party	Resources	Start date	Completion
Task One: Receive and distribute report from assessment unit.	Kim Daniels, Head, Marketing Department	Final copy of report	12/12/16	12/12/16
Task Two: Design alternative logos.	Carey Mitchel, Graphic Designer	40 hours of project time	12/12/16	12/23/16
Task Three: Submit first round of logos to Director's Office.	Kim Daniels, Head, Marketing Department	None	1/3/17	1/13/17
Task Four: Distribute feedback.	Kim Daniels, Head, Marketing Department	None	1/16/17	1/16/17
Task Five: Incorporate changes.	Carey Mitchel, Graphic Designer	25 hours of project time	1/16/17	1/27/15
Task Six: Submit second round of logos to Director's Office.	Kim Daniels, Head, Marketing Department	None	1/30/17	2/10/17
Task Seven: Distribute feedback.	Kim Daniels, Head, Marketing Department	None	2/13/17	2/13/17
Task Eight: Incorporate changes.	Carey Mitchel, Graphic Designer	10 hours of project time	2/13/17	2/17/17
Task Nine: Submit final design to Director's office for presentation at board meeting.	Kim Daniels, Head, Marketing Department	None	2/20/17	2/20/17
Task Ten: Confirm final design.	Grant Jacoby, Library Director & Kim Daniels, Head Marketing Department	None	3/2/17	3/6/17
Task Eleven: Distribute design to IT.	Mark Cotter, Marketing Intern	None	3/6/17	3/6/17
Task Twelve: Add new logo to marketing materials.	Mark Cotter, Marketing Intern	40 hours of project time	3/6/17	4/7/17

sion should move at a considerably swifter pace for two main reasons. First, operational plans are rarely created by a large committee, if by a committee at all, thereby, cutting down on the amount of meetings and communication that takes place. Second, depending on the specific nature of a task, a leader may already know what needs to occur and be ready to draft a plan with minimal reflection or discussion.

*Drafting and release*—this stage involves writing the plan in a clear and concise manner before it is released to those who will accomplish it. Operational plans are very brief and straightforward: they list the task, desired outcome, resources needed, and timetable. In this way, the operational plan essentially serves as a basic checklist that can be followed (see Table 3).

*Execution and evaluation*—operational plans are rolled out as needed to address the goals and objectives of tactical plans. This rollout makes them a continuous occurrence within the workplace. A new plan should

be ready for implementation as soon as the previous one comes to the end of its lifecycle. How often an operational plan is evaluated will depend on its complexity, but leaders should refer to it as often as necessary to make adjustments. Once the plan has run its course it should be evaluated for effectiveness and stored for future reference.

**WHY PLAN?**

Organizations rely on planning to provide direction on where they are headed and how they will get there. Leaders, by virtue of being tasked with helping an organization fulfill its mission, must be involved in the process of planning. Regardless of a leader's organizational level, he or she is an important driver in determining organizational success.

Through the thoughtful use of strategic, tactical, and operational plans, leaders can both recognize which plans are being used and, more importantly, begin to positively affect their organization by creating effective plans. ■

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**» Organizations rely on planning to provide direction on where they are headed and how they will get there. Leaders, by virtue of being tasked with helping an organization fulfill its mission, must be involved in the process of planning. Regardless of a leader's organizational level, he or she is an important driver in determining organizational success. e the door open once that outcome is achieved.**

# Research Defines and Guides Libraries

» Surveys provide authoritative data for library planning and decision making.

BY MARY ALICE DAVIDSON

In the ebooklet “Librarians Do Research, Too!,”<sup>1</sup> author Carol Tenopir<sup>2</sup> suggests five reasons why librarians should do their own research. She contends it can help them:

- Improve their LIS practices,
- Partner with and understand the needs of researchers,
- Collaborate with librarians in different environments,
- Bring in grant money, and
- Build toward promotion and/or tenure.

Tenopir certainly makes a valid point about the value librarians can gain from engaging in the research process in general. But she also cautions that librarians venturing down this path must be willing to invest the time needed to do the research properly while balancing the other commitments in the rest of their workload.

But there’s another way to reap the benefits of research without making a personal commitment to acquire the necessary skills, methodologies, and statistical know-how. To achieve information that can be used to attain the benefits outlined in Tenopir’s five reasons: plug into the research of others.

Recently, the results of numerous seminal research projects within the library space have been released. Individually or as a whole, the findings can help lead to new ways to provide services when faced with tight funding for capital projects and patron services. Armed with documented results from credible researchers, librarians can form alliances and improve their own skills toward rewarding career growth.

## THE STATE OF AMERICA’S LIBRARIES 2016<sup>3</sup>

A report from the American Library Association (ALA), edited by Kathy Rosa, Ed.D., MSLS,<sup>4</sup> details concepts and trends in library systems.



Libraries today are less about what they have for people and more about what they do for and with people. Library professionals promote opportunities for individuals and progress for communities. Libraries of all kinds add value in five key areas (the E’s of Libraries): education, employment, entrepreneurship, empowerment, and engagement. They are advancing the legacy of reading and developing a digitally inclusive society.

*Libraries Transform.* ALA launched a new public awareness campaign in 2015. Called “Libraries Transform,”<sup>4</sup> the initiative seeks to shift the mindset in two ways:

- From “libraries are obsolete or nice to have” to “libraries are essential.”
- From “libraries are just quiet reading places to do research, find a book, and read” to “libraries are centers of their communities: places to learn, create, and share with the help of library staff and the resources they provide.”

Current economic challenges increasingly demand that the value of libraries be demonstrated through performance measurement. Historically, libraries have measured performance by counts of circulation, visits, and program attendance. Today, a shift in expectations means that libraries need to measure not just counts, but outcomes. One of the biggest challenges for all types of libraries today is to demonstrate how people’s lives are changed through library resources, programs, and services.

Central to the Libraries Transform campaign is the use of the provocative “Because” statements (see Figure 1) that challenge individuals to rethink what they know about libraries. More than 1,500 libraries have registered to participate.

## ACADEMIC LIBRARIES

Nearly half of chief academic officers at U.S. colleges and universities believe their institutions have not yet recovered from the

## Figure 1: Why Libraries are Transforming

### LITERACY MATTERS

- BECAUSE LEARNING TO READ COMES BEFORE READING TO LEARN.
- BECAUSE PUNCTUATION WITHOUT IMAGINATION MAKES A SENTENCE, NOT A STORY.
- BECAUSE 5 OUT OF 5 DOCTORS AGREE READING ALOUD TO CHILDREN SUPPORTS BRAIN DEVELOPMENT.
- BECAUSE TXT R FINE, BUT SRSLY, PPL ALSO NEED 2 C REAL SENTENCES.

### PROVIDING ASSISTANCE

- BECAUSE THERE ARE MORE THAN 14,400,000 SEARCH RESULTS FOR THE 2016 PRESIDENTIAL ELECTION.

### TASTY BEVERAGES

- BECAUSE WHY SHOULDN'T YOU BE ABLE TO BRING YOUR GRANDE CARAMEL SNICKERDOODLE MACCHIATO?

### READY ACCESS

- BECAUSE STUDENTS CAN'T AFFORD SCHOLARLY JOURNALS ON A RAMEN NOODLE BUDGET.

2008 economic downturn (see Figure 2). As a result, pressure on higher education to demonstrate value remains the top issue facing academic libraries.

The Association of College and Research Libraries Assessment in Action program supports the growing body of evidence that demonstrates five positive contributions of academic libraries to student learning:

- Improved information literacy competencies for first-year students,
- Increased student success in library use,
- Documented student retention with library instruction,
- Demonstrated library contributions to collaborative academic student support, and
- Enhanced student learning with library research consultation services.

Academic librarians can see their impact on student learning reflected in the results of the 2015 National Survey of Student Engagement summary.<sup>5</sup> The survey shows that 34 percent of the first-year

### DIGITAL LEARNING

- BECAUSE ADDING MINECRAFT TO CURRICULUM MAY INSPIRE MORE FUTURE ENGINEERS THAN MATHEMATICS ALONE.

### ACCESS TO INFORMATION

- BECAUSE MORE THAN A QUARTER OF U.S. HOUSEHOLDS DON'T HAVE A COMPUTER WITH AN INTERNET CONNECTION.

### INTERNET SAFETY

- BECAUSE THE WORLD IS AT THEIR FINGERTIPS AND THE WORLD CAN BE A SCARY PLACE.

### SHARING SKILLS

- BECAUSE EMPLOYERS WANT CANDIDATES WHO KNOW THE DIFFERENCE BETWEEN A WEB SEARCH AND RESEARCH.

students who participated agreed that their experiences at their institution contributed “very much” to their knowledge, skills, and personal development in using information effectively. More impressively, 47 percent of seniors agreed with the same statement.

Learning commons are being designed to provide integrated approaches and programming that foster holistic student success. Providing space for student collaboration was a high priority for nearly 90 percent of academic institutions.

Spaces are being designed to allow users to engage with a range of technologies. Many libraries offer multimedia production facilities and technology tools that support media-enriched content creation. Digital scholarship centers that provide equipment, expertise, and services are increasingly found in all types of academic institutions.

### SCHOOL LIBRARIES

School librarians and administrators across the county are taking meaningful steps to further their collaborative partnerships as school-wide, student-centered educators. In most cases, administrators learn what school librarians do from school librarians. More than 90 percent of principals receive no formal training related to school librar-

ians as they prepare for their jobs. And 65 percent of principals' knowledge of the instruction role of the school librarian is derived from interactions with school librarians during their careers.

More than 2,000 school library professionals participated in the Speak Up National Research Project surveys, conducted each fall by Project Tomorrow.<sup>6</sup> In the last six years, school librarians have seen significant challenges in what they are providing to teachers and students and supporting digital content. In 2010, for example, only 35 percent of school librarians indicated that they were acquiring digital content. By 2015, that number had increased to 69 percent, particularly databases, ebooks, periodicals, videos, and games. At the same time, large increases were reported by school librarians in their inability to support digital content, specifically lack of sufficient Internet access, student access to technology, and the ability to locate appropriate digital content. In addition, they reported, teachers were not comfortable using digital content.

Recently, the American Association of School Librarians (AASL) embarked on a standards remodeling project<sup>7</sup> to ensure that school librarians are leading progressive, engaging, and dynamic learning opportunities for students. An initial survey found that 41 percent of respondents felt that the AASL standards and guidelines needed updating. The most common request was to develop both student and professional standards that are more closely aligned, thereby increasing their appeal and validity among administrators and teachers.

Further research is being conducted by AASL through a 2015 Laura Bush 21st Century Librarian Program grant from the Institute of Museum and Library Services.

### PUBLIC LIBRARIES

Public libraries are continually required to assess their value. Traditional quantitative data only measure how much is done; outcome measures, on the other hand, are a better way to demonstrate a library's effect on its community.

The Public Library Association (PLA) responded to this trend toward standardized performance measures in 2013 by forming the PLA Performance Measurement Task Force made up of library leaders, researchers, and data analysts. The group created a set of surveys that cover core services that libraries can link to improvements or changes in patrons' knowledge, behavior,



skills, application, and awareness.

The result, Project Outcome,<sup>8</sup> was launched in 2015 to help public libraries understand and share the affect of essential library services through free, online resources, surveys, and data analysis tools. By February 2016, more than 1,000 registered users from 700 public libraries had collected more than 7,000 patron outcome surveys. The results have sparked internal staff conversations, grant applications, programmatic changes based on feedback, increased involvement from city councils and library boards, and discussions with community partners.

By combining outcome measurements with traditional data collection, libraries are better equipped for internal decision-making, advocacy, and strategic planning—proving that better data makes better libraries.

### NATIONAL ISSUES AND TRENDS

Among the many issues facing libraries today, there is one—an amended education law—that calls for celebration. President Obama signed the Every Student Succeeds Act (ESSA) on December 15, 2015.<sup>9</sup> The measure reauthorizes the Elementary and Secondary Education Act (ESEA) of 1965, legislation that provides funding to schools and extends equal opportunity to education for all students. The definition of “specialized instructional support personnel” in ESEA has been updated in ESSA to include “school librarians” and recognize school libraries as crucial to successful student outcomes.

Enhancement of the professional library degree got a boost in 2015 as well. New Standards for Accreditation of Master’s Programs in Library and Information Studies were released along with a fourth edition of its companion manual, *Accreditation Process, Policies, and Procedures*.<sup>10</sup>

Helping to shape views on privacy in the digital age, both ALA and the National Information Standards Organization released updated guidelines.<sup>11</sup> Both groups agreed in their guidelines that digital privacy cannot be maintained only by libraries and requires the coordinated support of many stakeholders.

Although most library funding originates at the local and state levels, federal support is

## Figure 2: Employment Outlook for Academic Libraries

Academic libraries provided 26.7 percent of all jobs for new library school graduates in 2015 up slightly from 2013. The average starting salary for academic librarians was \$42,000. New job responsibilities include data management and data analytics, digital archives, information security, and geospatial information. Library expenditures for salaries and wages accounted for an average of 57.3 percent of total library expenditures for all academic institutions.

an important segment of library revenue. The Library Services and Technology Act (LSTA), a major source of library funding, is part of the annual Labor, Health and Human Services, and Education appropriations bill. LSTA grants totaled \$180.9 million for FY2015. Additional federal funding for school libraries takes place through the Innovative Approaches to Literacy program, which received \$25 million in funds during FY2015.

### PERCEPTIONS 2015: AN INTERNATIONAL SURVEY OF LIBRARY AUTOMATION<sup>12</sup>

This ninth annual report, by Marshall Breeding, provides evaluative ratings submitted by individuals representing nearly 3,500 libraries from 64 countries describing experiences with 138 different automation products, including both proprietary and open source systems. The survey results include 1,050 narrative comments providing candid statements—both positive and negative—about the products and companies involved or statements of intent regarding future automation plans.

The survey attempted to limit responses to one per library. This restriction was imposed to sway the respondents to reflect the broad perceptions of their institutions rather than their personal opinions. The report analyses the results of the survey, presents a variety of statistical tables based on the data collected, and provides initial observations. It aims to provide information to libraries as they evaluate their options for strategic technology products and to the organizations involved in providing these products and services as constructive criticism to help guide improvements.

Libraries make major investments in stra-

tegic automation products, both during the initial implementation period and in annual fees paid for support, software maintenance, and other services. They depend on these products for efficient management of their daily operations and to provide access to their collections and services. The survey report allows libraries to benefit from the perceptions of their peers regarding the quality of automation systems and of the performance of the organizations involved in their development or support.

Libraries in immediate need of replacing their current system, or in the process of making longer term technology strategies, can benefit from data across a variety of sources as they assess options. An important avenue of investigation involves data from libraries with first-hand experience with the products and vendors.

This survey aims to measure the perceptions libraries hold regarding their current automation products and the companies that support them, and to capture their intentions about future migration options. It also explores interest in open source library automation systems, a key issue for the industry. Through its large number of responses, the survey aggregates the subjective experience of many libraries to create meaningful results, which are reasonably informative about the collective experience of libraries with this set of products and companies.

Libraries may refer to the results of this survey as they formulate technology strategies or evaluate specific products. Although the impressions of libraries using a given product inform one area of investigation, libraries should be careful not to overem-

» **By combining outcome measurements with traditional data collection, libraries are better equipped for internal decision-making, advocacy, and strategic planning—proving that better data makes better libraries.**

» The survey results also aim to provide useful information to the companies involved in the library automation industry. While many companies perform their own measures of client satisfaction, this survey may show perceptions quite different from internal customer surveys.

phasize the statistics or narrative comments in a procurement process. While it reflects the responses of a large number of libraries using these products, the survey should be taken more as an instrument to guide what questions that a library might bring up in their considerations than to drive any conclusions.

Especially for libraries with more complex needs, it's unrealistic to expect satisfaction scores at the very top of the rankings. Large and complex libraries exercise all aspects of an automation system and at any given time may have outstanding issues that would result in survey responses short of the highest marks. While a given product may earn positive responses from one sector, it may not be a good choice for libraries with different requirements.

The survey results also aim to provide useful information to the companies involved in the library automation industry. While many companies perform their own measures of client satisfaction, this survey may show perceptions quite different from internal customer surveys. The rankings in each category and the published comments can provide useful data to assist each of the companies as they hone in on problem areas and make any needed adjustments to their support procedures or product directions. ■

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#### FOOTNOTES and WEBSITES:

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<sup>2</sup> Carol Tenopir is Chancellor's Professor, School of Information Sciences, University of Tennessee, Knoxville. [ctenopir@utk.edu](mailto:ctenopir@utk.edu)

<sup>3</sup> <http://www.ala.org/news/state-americas-libraries-report-2016>

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<sup>6</sup> <http://www.tomorrow.org/speakup/>

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<sup>11</sup> <http://ala.org/advocacy/library-privacy-guidelines-e-book-lending-and-digital-content-vendors>

[http://www.niso.org/topics/tl/patron\\_privacy/](http://www.niso.org/topics/tl/patron_privacy/)

<sup>12</sup> <http://librarytechnology.org/perceptions/2015/> Used with the permission of the author.

#### ADDITIONAL RESOURCES

*School Libraries Work! A Compendium of Research Supporting the Effectiveness of School Libraries*, 2016 Edition. Scholastic Library Publishing. <http://www.scholastic.com/SLW2016/>

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