

Marketing Libraries
An Annotated Bibliography
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Divided into the various marketing aspects, the following bibliography will help you and your colleagues locate information about devising and implementing a marketing plan for your institution/organization.

Marketing Plan

ACRL/ALA/3M Library Systems. "Strategic Marketing for Academic and Research Libraries."

Marketing @ Your Library. ALA. 3 September 2005.

<http://www.ala.org/ala/acrl/acrlissues/marketingyourlib/marketingyour.htm>

This manual is part of *@ Your Library*, the Campaign for America's Libraries. The ACRL, ALA and 3M have partnered to create a new, national marketing effort to heighten awareness and support of academic and research libraries. Its intention is to serve academic and research librarians, library leaders and administrators who need a toolset and process to help them create a marketing plan and promotional campaign. In each chapter, you will find introductory information including models, definitions and steps; tools to use to collect and display research and make informed decisions.

The toolkit includes creative strategies, practical ideas, case studies and profiles, customizable press materials, resource lists, and more; additional marketing resources; and downloadable graphics.

Seven chapters address preparation directions, doing library user research, developing a strategic plan, promoting the library via messages, AIDA and platforms, through vehicles and campaign design, and implementing the promotional campaign. This tutorial is designed for academic and research environments – an entity in great need of formalized campaign methods.

De Saez, Eileen Elliot. Marketing Concepts for Libraries and Information Services. 2nd ed. New York : Neal-Schuman Publishers, 2002

This introduction to a wide range of basic marketing concepts and techniques includes an extensive discussion of marketing in the digital age. It explores the potential of e-marketing for librarians and information managers; data mining and customer relationship management; as well basic marketing techniques. Here is a comprehensive foundation and structure for effective strategic library marketing. (Neal-Schumann)

Haricombe, Lorraine J. and T.J. Lusher, ed. Creating the Agile Library : A Management Guide for Librarians. Westport, CN: Greenwood Press, 1998.

In an attempt to help academic libraries respond to changes in library environment that was thought to be risk-free, this book concentrates on the concept of becoming agile – being able to adapt to a changing environment, changes in user needs and desires as well as concerns in funding the library. New technology and how to handle it is also an issue for today's libraries as well as the new frontiers of higher education, specifically distance education. Each chapter addresses these challenges. Finally marketing is addressed as yet another area libraries need to manage. Darlene Weingand (Chapter 7) provides a firm foundation for librarians who are initiating a marketing plan. She ties in the marketing aspect with the balance of the theme of the book – becoming agile and 'thinking outside the box' in order to accommodate change. Overall every chapter has something to offer for today's academic librarians.

Marketing Library Services. May 2005. Information Today, Inc. at <http://www.infotoday.com>

MLS, a newsletter publication of Information Today, Inc., is a great tool for information professionals in all types of libraries. This newsletter produces mega-suggestions and planning programs to help libraries market their services, make money, and increase business. This newsletter is available in print or electronic form via the web. The articles listed below are a sampling of the valuable information presented by this publication.

Helton, Rae and Stuart Esrock. "Positioning and Marketing Academic Libraries to Students," Marketing Library Services. 12.3 (April/May 1998). 3 September 2005. <http://www.infotoday.com/MLS/jan04/koontz.shtml>

This article relates a real life situation at the University of Louisville, KY by the two authors, Rae Helton, Director of Information Literacy and Stuart Esrock, a professor in the Department of Communications, also at U of L. They identify the academic dilemma at the university regarding the students and several solutions to service their information needs. They explained how to identify the needs of the audience then how they developed several information literacy programs teaching the students how to research. One program called "Jump Start," is a mini drop-in session designed to cover the basics. Another program is called Web Search and has proven to be popular with students. A short article but one to that shows the reader another way to solve the service issues of student-library connection.

Kassel, Amelia. "How to Write a Marketing Plan," Marketing Library Services. 13. 5 (June 1999). 3 September 2005. <http://www.infotoday.com/jun99/how-to.htm>

Written by a professional in the information brokerage field, Kassel outlines a tried and true marketing plan that will work for professional librarians. Each component is expanded upon by Kassel providing instructions on what to do. There are hints and tips for beginners. Kassel also explains the *necessary planning* that needs to be completed prior to implementing a marketing plan. This involves defining the target market and conducting market research. This article is a great preliminary tool for those just starting to devise a marketing plan for their library.

Koontz, Christie. "The Marketing Mix: The 4-P Recipe for Customer Satisfaction," Marketing Library Service, 18 no.1 – Jan-Feb 2004. <http://www.infotoday.com/MLS/jan04/koontz.shtml>

Discusses the marketing mix strategy within the library environment, specifically the four P's - product, price, place of distribution and publicity. Koontz cites concept by retelling a presentation she gave at RUSA (Reference and User Services Association) division of ALA, called "Marketing Wild Burros: A Four Step Approach Customer-Based Marketing." She compares library marketing with increasing distribution of wild burros. The four P's are analyzed by embracing the concept that libraries offer *products* to customers, recognizing that *price* is what people give up to obtain a product, that in order to serve the library patron, we need to consider *place* from the users point of view and finally identifying the customer in order to *promote* the library's service, and ways to promote.

Nichols, John V. "Using Future Trends to Inform Planning/Marketing," Library Trends. Urbana: Winter 1995. Vol. 43, Iss. 3; p. 349

This article examines literature referring to new technologies and trends for libraries in order to understand how to market them. Theories are presented in philosophical and inspiring thought for the librarian who is beginning the marketing adventure. Nichols analogizes library situations with poetry and prose – using Robert Frost's 'Road less traveled by' as a direction measure for libraries. He delivers thought provoking imaging for the reader as he deals with the underlying problems of information delivery, the explosion of data and how

people read information through history and how that has changed. Future trends include the financial and technological spheres, and Nichols provides ample illustrations of how librarians might incorporate the use of these future trends into planning and marketing efforts in their libraries.

His thoughts direct the reader to understand that in order for libraries to succeed in the future, that change is necessary. How to address change is as the root of the representations given. In the face of increased competition for funds, increased public expectations for service and growing competition from the private sector in providing information, readers will find direction to begin the adventure of marketing their library. Though written with public libraries in mind, this article will also benefit many library situations.

Siess, Judith. The Visible Librarian: Asserting Your Value with Marketing and Advocacy. Chicago: American Library Association, 2003.

Superbly presented guide for librarians which is especially timely in an era of economically strained time marked with corporate library downsizing, academic library retrenchment, and public library closures. Straightforward marketing, customer service, and public relations techniques for librarians and library managers make The Visible Librarian a practical, easy-to-follow, in-depth, and strongly recommended instructional guide for effectively promoting the enrichment and value of library services to its patrons and service communities. (Neal-Schumann)

Walters, Suzanne. Library Marketing That Works! New York: Neal-Schuman Publishers; Bk&CD-Rom edition. 2004.

Walters provides step-by-step guidance for each and every phase of a comprehensive marketing program: determining the mission, conducting a SWOT analysis, doing market research, holding focus groups, planning campaigns, developing strategic marketing plans, and evaluating marketing efforts. Part II explores new techniques librarians can use including relationship marketing, marketing using listservs and Web sites, developing and using a wide variety of contact databases, and building relationships with stakeholders and donors. The how-to guidance, success stories, and an accompanying CD-ROM with all the forms and other tools included in the book make this a complete marketing action plan for libraries. (Neal-Schumann)

Weingand, Darlene. Marketing/Planning Library and Information Services. 2nd ed. Englewood, CO: Libraries Unlimited, 1999.

This edition, like the first, is designed to serve as a resource for information professionals in the field, and students, as prospective professionals. It provides a foundation for developing a marketing/planning system. Unlike the first edition, this book has expanded to eleven chapters charting the entire process flow of developing and executing a marketing plan for your library. Some concepts have been merged and others increased in scope. Basic questions like “What is marketing?” and “how does marketing connect to the planning process?” are answered. It looks at marketing and planning as separate systems with intentions that both merge. The concept of team building is discussed, and it expands on the creation of a mission as well as developing a vision for the future. There is a chapter on market audits, one on developing goals, objectives and action strategies. Several chapters address the four P’s – product, price, place, and promotion. There is a chapter devoted to ‘two’ approaches to evaluating your marketing plan (process and final evaluation), and offer valid reasons why evaluation is an important part of the marketing process. This edition comes full circle of planning and implementing a marketing plan. The concepts presented can be used as a framework for anyone planning to market a library entity.

Environmental Scan, Market Audit, Community Analysis

Cram, Laura. "The Marketing Audit: Baseline for Action," Library Trends. Urbana: Winter 1995. Vol. 43, Iss. 3; p. 326

This article addresses the vital elements of auditing in preparing an effective marketing strategy. It looks at all the necessary steps to develop a solid base for planning, from the comprehensive community profile, to perceived service quality, from two points of view: the customer and the staff. Definitions of terms explored include *marketing audit*, *community analysis*, *environmental scanning*, *SWOT analysis* and *needs analysis*. Cram expands on each term and provides a path for library professionals to follow.

Cram informs the reader of several assumptions that need to be addressed in pursuing a successful marketing plan via the audit. They include customer needs and satisfaction; the fact that no situation is static anymore, so planning for change needs to be a constant activity for management; what suits one library /information agency does not necessarily suit another and library and information professionals must be prepared to compete with others in order to maintain healthy service. Defining the user community (customer) and their needs is the first agenda to address in order to define the goals of the library in order to market its products. Cram helps the reader to consider demographic, psychographic and motivational information about the community in finding answers to their own situation. An equally important factor in auditing the library is the staff and their views, motivation (or lack of) and reasons for all. This article is a good starting point for researching library market auditing. There are many references cited in the bibliography at the end for further investigation.

Hernon, Peter. An Action Plan for Outcomes Assessment in Your Library. Chicago: American Library Association, 2002.

Academic libraries must engage in assessment efforts to demonstrate the value of student learning and faculty support to a higher education community. Assessment efforts also apply to preparation of marketing plans and assessing the needs of the users in order to target a prospective market. This book addresses a practical focus and provides data collection instruments that libraries can adapt to and acquire valuable information of outcome assessments. The information applies to both academic and public libraries. It is a useful how-to manual with detailed examples from actual outcomes assessment programs that will prepare the reader to execute a plan by identifying user needs, collecting and analyzing data and presenting the findings and measure the value of the services your library is providing and ideas for improvement. Finally, the author emphatically maintains that service quality and user satisfaction should be regarded as integral to and not separate from outcomes assessments. In marketing libraries user satisfaction and service quality are the outcome assessments needed to be successful. The tools within this book will help libraries target their market.

Hernon, Peter and Ellen Altman. Assessing Service Quality: Satisfying the Expectations of Library Customers. Chicago: American Library Association, 1998.

The authors state "Customers are more than a source for data collection; they are the reason for libraries' existence." It is important (if not essential) to listen to, to learn from, customers and to use the insights gained to improve services."

The intention of the authors is to present new ways to think about service, along with some methods for evaluation and improving service. Libraries can select, from among the methods discussed, those most appropriate to their particular situation and implement them at a pace that suits their needs. This book [provides cutting-edge measurement strategies and data collection methods to measure service quality in academic and public libraries. Topics covered include implementing a compliment and complaint tracking system, listening to customers through surveys and focus groups, and planning for constant service quality progress. Practical assessment tools – tracking forms and sample surveys are included. A vital part of

developing a marketing plan is to establish a customer need. This book helps the library to pinpoint a need in order to devise a mission and plan for a remedy.

Junion-Metz, Gail and Derrick L. Metz. Instant Web Forms and Surveys for Academic Libraries. New York: Neal-Schuman Netguide Series, 2001.

A Web trainer and former academic librarian (Junion-Metz) and a computer science student (Metz) provide libraries with a way to efficiently upgrade or add forms on their Web sites. The manual and CD-ROM contain 24 online forms and surveys in HTML format with matching Perl scripts that can be customized and uploaded. The forms and surveys are valuable tools for surveying a population about their needs and wants. Categories covered in the forms/surveys include reference, library instruction, library computers, the library Web site, collection development, interlibrary loan, circulation, and miscellaneous (media, strategic planning). These ready-made forms can be useful for any size library and even if the library administrator is not responsible for uploading forms, a toolkit is provided with background information and instructions for working with technical staff. The forms and surveys provided are beneficial when analyzing a target market for marketing purposes. Providing an 'instant' approach to online forms and script is an integral part of strategic planning today for libraries whether it is in marketing or wide-ranging planning.

Lancaster, F. W. If You Want to Evaluate Your Library. 2nd ed. Champaign, IL : University of Illinois: 1993.

This book discusses methods that can be used to evaluate various facets of library service, to help identify reasons for successes and failures, and to help determine success rates. These facets relate primarily to "document delivery" as well as reference services. Some chapters cover related evaluation topics, including cost-effectiveness and cost-benefit aspects. This new edition also discusses the feasibility of continuous quality control as applied to library services. Though Lancaster wrote this book as a text for institutional instruction, it is a valuable tool for librarians in the selection of evaluation procedures to apply to their own institutions. It will help in compiling inputs, outputs and outcome assessments for evaluation of a library to help administrators define what their library could be and where they need to improve. As a marketing resource, this text is part of the foundation of library evaluation and therefore a necessary implement in helping library administrators make informed decisions on the library's direction, user needs and wants and promotional strategies.

Newsome, James and Claire McInerney. "Environmental Scanning and the Information Manager," New York: Special Libraries. Fall 1990. Vol. 81, Iss. 4; p. 285-293.

Environmental scanning is a key analysis tool to help libraries plan and identify hazards or opportunities in the outside world that may impact the organization. Newsome and McInerney detail all aspects of what environmental scanning is – a method to assist strategic planners and marketing engineers to enhance the library. They define the nine components of the scanning model and address all nine components so that information manager has a clear idea to implement the scanning model. They are: (1) Selecting the people to be on the scanning team, (2) selecting the resources to scan, (3) choosing the criteria by which to scan, (4) the actual scanning process, (5) identifying the indicators that predict possible new issues, (6) selecting the key events, issues and trends discovered through the process, (7) monitoring and analyzing those events, issues and trends, (8) disseminating the information scanned and analyzed and finally (9) deciding the action to take by the organization. Finally benefits to the library are clearly listed. This article clearly articulates all aspects of environmental scanning.

Sarling, Jo Haight and Debra S. Van Tassel, ed. Community Analysis for Libraries and Librarians. Denver Public Library; Louisville Public Library, 16 Feb 2005.
http://skyways.lib.ks.us/pathway/ca_homepage.html

The website is designed to provide answers to questions such as - what is community analysis? Why should one consider a community analysis? How should a community analysis be done and how will your library and your community benefit?

The editors come from a public library setting, but offer valuable information for any library on this topic. Several access links serve as a complete reference source for libraries, librarians and students of library science who are interested in the theory and practice of community analysis. The site includes a quick reference guide which offers short answers to the what, where and whys of community analyses. A how-to sequence is provided with explanations of each step. Examples are then given via links to other websites. A history of community analysis is provided. Sarling and Van Tassel also provide an extensive bibliography, links to other resources on the web and the Community Analysis for the Valdez-Perry Branch of the Denver Public Library. This is a wonderful tool for those in the beginning stages of a marketing /promotional plan.

Public Relations (Press Releases, Public Service Announcements, Media Relations, Customer Service)

A Communications Handbook for Libraries . Chicago: American Library Association, 2004.

This manual is intended to be a primary resource for librarians when promoting public relations. The American Library Association has put this manual together in order to help libraries to obtain media visibility for events and programs while keeping to a most-often restricted budget. This communications tutorial walks you through developing a targeted/simple media/communications plan helping you to first determine goals and objectives, defining the audience, devising a key message, outlining tactics (what will best fit your library), the timeframe, staying within your budget and evaluation of the effectiveness after the fact. Moving forward with a plan then requires looking at the fundamental outlets and advisories – print, TV/Cable, radio, Internet, wires and newswires. Each media type is then expanded upon using multiple mediums. For example media advisories (written word) may include news, feature stories, editorials, public service announcements op-eds, etc. Samples of many are provided - new releases, public service announcements. Interviews are discussed extensively and even explain how to train a spokesperson.

Bajjaly, Stephwn T. The Community Network Handbook, Chicago: American Library Association, 1999.

This book examines the complete process of community networking: planning, developing partnerships, funding, marketing, content, public access, and evaluation. It is designed to help the reader develop and deliver important twenty-first century information services to their community. Every community is unique so a ‘one size fits all’ solution cannot work for community networking. Stephen Bajjaly’s goal is to point the reader in the right direction with all the pertinent information the he/she may need to execute profitable community networking. He provides contact information for readers who wish to consult helpful organizations as well as other valuable resources – both in print and online. This book is not aimed at libraries but as a general source for anyone interested in marketing and promoting an entity. There is a chapter specifically devoted to marketing and public relations, serving as a tool for library promoters.

Under the guidance of author Stephen Bajjaly, founder and project director of South Carolina's MidNet, the reader will learn how to conceptualize community networking initiatives that make sense for one’s circumstances by giving the reader an overview of the issues and activities that should be considered for their organization.

Karp, Rashedle S., ed. Powerful Public Relations: A How-to guide for Libraries. Chicago: American Library Association, 2002.

This updated edition of prior publication titled 'Part-time Public Relations with Full-time results (published in 1995) is a continuation of a valuable primer for the working librarian on the why and how of public relations. Library professionals and public relation specialists give recommendations on marketing and development activities, press releases, strategies for producing brochures using desktop technology, creating a Web-based public relations plan, developing multimedia promotional programs in the library, and planning special events and exhibits that generate publicity. More current concepts are presented in new chapters.

Of interest is the chapter "Interactive Multimedia Programs via Touch Screen Kiosks and CD-ROMs," which discusses technologies that many have not yet considered. The book includes a thorough index, sample press releases, brochures and flyers, and annotated bibliographies.

Though directly mainly at academic libraries, these activities could engage other types of libraries. Most importantly this information revolves around *all* those involved in the library – the director, librarians, library staff and volunteers. Karp is associate vice president for academic affairs at Clarion University. This volume is an update of Part-time PR with Fulltime Results, published in 1995.

Tuggle, Ann Montgomery and Dawn Hansen Heller. Grand Schemes and Nitty Gritty Details: library PR that Works. Littleton, CO: Libraries Unlimited, 1987.

This book focuses on public relations using winners of the John Cotton Dana Award winning strategies as samples. There are nine schemes which are believed to be at the heart of successful and winning libraries Public Relations programs. Divided into two major parts, the first eight chapters concentrate on the nine themes (or principles) that have worked in real PR programs in actual libraries. Each principle is explained and illustrated by selected examples from award winners. The appendix lists all winners cited in each chapter. The second set of chapters provide a foundation for the reader, providing practical tips for designing and judging programs, successful public speaking, and working with printed pieces (newsletters, annual reports and communications via slide shows and video tapes). This section also offers testimonies from experienced people to help the reader avoid common pitfalls and total calamities. Given the examples of other libraries to illustrate nitty-gritty details, primary importance is placed on the how-to-do-it guide and reference section.

Weingand, Darlene. Customer Service Excellence: a concise guide for librarians. Chicago: ALA, 1997.

As quoted by the author: "Service is one of the cornerstones of the library's product and must, therefore, assume the role of the foundation." Weingand addresses the most important commodity of the library – its customers. Therefore customer service is a top priority. Weingand describes who today's library customers are, how we can find out what they want, and what it takes to make a library environment user-friendly. She reflects on twin themes of customer service as both a mandate and the goal of service excellence. Attention is given to multiple aspects of 'product' and how quality excellence and product interact within the overall operation of the library as key to customer satisfaction and thereby central to customer service. A chapter discussing a team approach for developing a successful customer service expands on team goals – to improve both visible and invisible services. Problem solving is addressed as well as conflict management. Weingand concludes by identifying a strategy for success through summarizing prior chapters and presenting future prospective in developing excellent customer service.

A nice feature for the reader – customer service dilemmas presented at the end of each chapter along with possible solutions.

Wolf, Lisa A. (1997). Library Public Relations, Promotions and Communications: A How-to-do-it Manual. New York: Neal-Schuman Publishers.

This step-by-step guide shows the best techniques to help your library and reap the benefits of well-planned and executed campaigns. Chapters explain how to write, review, and update a communications plan; develop a corporate identity; make the most of media coverage; use volunteers; get a message out at programs and events; create effective newsletters, brochures, posters, and other print communications; and use the Internet, World Wide Web, online services, and local bulletin board services for publicity. Throughout, examples and case studies illustrate effective communication techniques and strategies for all kinds of libraries. Appendixes include sample news releases, lists of library press, state and national public relations networking opportunities, and online services appropriate for library publicity.

Promotional Materials (newsletters, brochures, guides, websites)

“PR Tools and Resources.” @ Your Library Campaign. American Library Association, 15 Jan 2005. <http://www.ala.org/ala/pio/campaign/prtools/prtoolsresources.htm>

As part of the ALA’s Campaign for America’s Libraries, PR tools and resources include a wealth of ideas and ready-made samples for you to copy and use, free of charge. There is a huge communications handbook for you to print out and keep as a reference tool. PSA’s are available for television and radio. Online Member media relations tools include a well written article “Say the Right Thing: Winning Strategies for Talking to the Press” which includes media do’s and don’t – 12 rules of thumb when speaking to a media representative; a set of sample questions for you to answer should they be posed to you by the media; and the reporter’s view (from the other side). ALA Press Kits, downloading photos with library scenes, quotable Facts, quotes from prominent people about libraries can all be used as promotional materials for a marketing campaign. ALA graphics including @your library campaign logos, story ideas about libraries, librarians and library workers (under construction). This is a valuable resource and always a first look for library professionals.

“Academic Library Promotions.” Market Your Library, Thomson Gale. 21 Feb 2005. http://www.galegroup.com/free_resources/marketing/index.htm

Thomson Gale™ (www.gale.com), a business of The Thomson Corporation, assists information and education needs globally through its vast materials, which are used by students and consumers in their libraries, schools and on the Internet. The company is best known for the accuracy, extensiveness and usefulness of its data, addressing all types of information needs — from “homework help to health questions to business profiles — in a variety of formats — books, Web-based solutions and microfilm.” Within Thomson Gale’s website there is an area for Marketing your Library; within that area are multi levels identifying specific libraries. Thomson Gale has created their own marketing initiative for academic libraries called **Get connected in the library**. Designed by Thomson Gale’s in-house creative group, these marketing materials are simple to use, easy to personalize and free for users. One just needs to download the PDF file and print the item on their printer, or save it to a disk to take to an outside printer. Included are bookmarks, posters, fliers, print ads and radio scripts. One may apply these tools for their own marketing plan or glean ideas to create their own.

DiMarzio, Al. “Designing Brochures that Work.” Guilford, CT: HB Graphics. Online. 16 Feb 2005. http://www.hbgraphics.com/articles/design_broch.htm#cover

A how-to manual for designing brochures, this document will guide the reader through the process of creating a brochure. The purpose of using a brochure is to have a visual form of communication inviting the user to the library; thus a way of delivering a message creating a need for the user – to use the library. The author defines details in order for you to create a marketing tool to entice the user/patron to your organization. It discusses how to achieve the overall image, the message it portrays, content and basic design guidelines; also paper

choices, ink colors and font styles and size. Budget is discussed due to the nature of how detailed and extravagant you may or may not get to create the end product. Finally he includes a few thoughts on how to work with a desktop publisher and printer. This article is designed for businesses but can easily be adapted to a library.

Library Media & PR. Stephanie Stokes. Stephanie Stokes Design, 1995-2004. 14 Feb 2004.
<http://ssdesign.com/librarypr/index.html>

The heading of this website - Library Media & PR - has strategies, techniques, resources, tips and tools for library communicators. Stokes Design has successfully given the reader a great deal of information to better their library. Headings include a *Little Black Book* with useful contacts for the library communicator. It includes relevant web addresses and location addresses, phones, faxes, for professional organizations. *Awards and Contests* has publication awards and websites to log onto if your library would like to apply for an award. A complete list of ALA awards, grants and scholarships are given. A search venue is available locate a known source. Sixty plus *Articles* are listed with access to each. "Learning from Disney" with Mickey's Ten Commandments on how to make libraries popular destinations; Mickey's advice for creating an educational and entertaining experience and 10 tips for Marketing Virtual Reference Services are examples of what one may find. Finally a *Toolbox* that contains access to Web Art - clip art, symbols and such – bookmarks – banner art and links to other vendors of promotional tools give one multiple avenues to create a visual for advertising.

"Sample Publicity Materials." ALA/ACRL Online Media Relations Tools. ALA/Academic & Research Library Campaign website of the American Library Association. 21 Feb 2005
<http://www.ala.org/ala/pio/mediarelations/mediarelations.htm>

This document is a useful tool for those trying to develop promotional materials for their library campaign. Materials include samples of a news release, public service announcements (PSA), 10, 20 and 30-second spots and a sample opinion column, or letter to the editor. Each one carries a short explanation of how it was developed and there are blank areas that can be filled in by the library that wishes to use it for their own announcements. There are several public service announcements within each time frame (10, 20, 30 seconds). The opinion feature provides detailed specifics for the writer; maximum 700 words, with the key message and three key points reinforcing it. This sample focuses on a campus publication but can easily be adapted to other audiences. This short article can serve as a template for all libraries when mounting a promotional campaign through these publicity materials.

Development Officers/Fundraising

Butler, Meredith, ed. Successful Fundraising: Case Studies of Academic Libraries. Washington, D.C.
 : Association of Research Libraries, 2001.

This book was designed to assist library directors and those who want to become fundraisers for libraries to learn more about fundraising and find answers to their questions. It is a guide that offers well developed case studies written by experienced professionals who have experienced a variety of fundraising challenges, met with success, and are willing to share their stories with others. These stories describe actual events and circumstances, told for the purpose of instructing the reader, thereby prompting careful study and analysis. Each case study contains details to identify and analyze the time and place of the setting, the constraints and opportunities faced by the participant, the sources of information conferred with, the plan of action followed and the outcomes. Butler's goal is to assist library directors and other librarians who need to raise money for their libraries and want to learn more about how to do it. Through 12 case studies, valuable and practical strategies are given by those who have already experienced the effort – offering tried and true methods and

recommending suggestions for those embarking on the challenge of fundraising. An extensive annotated bibliography of the literature on library fundraising is included.

Dewey, Barbara I., ed. Raising Money for Academic and Research Libraries: A How-to-do-it Manual for Librarians. New York: Neal-Schuman Publishers, Inc. : 1991.

Barbara Dewey, member of DORAL (Development Officer of Academic Libraries) provides librarians and development officers a ‘bible for professionals’ on how to build an academic fundraising effort. Nine chapters cover the fundraising development plan – the critical importance of connection overall institutional themes and goals with library fundraising efforts, elements of the planning process, etc. Library friends groups are clarified, identifying them as an important starting point for a comprehensive library development program. Knowing who potential donors are and why they give is presented as well as categories of academic library donors, project selection based on donor profile, solicitation methods and methods for donor recognition. Grant opportunities are discussed as well as special information on grant resources along with instructions on writing a grant proposal. Dewey confers the importance of connections between academic libraries and corporations and provides a detailed outline for a campaign. She also provides insight to the most difficult hurdle of library fundraising – planned or deferred giving. Mounting a good public relations program is looked at and finally staffing and personnel issues are outlined. Eleven professional contributors help make this manual a bible for academic fundraising.

Dolnick, Sandra, Ed. Fundraising for Nonprofit Institutions, Foundations in Library and Information Science. Greenwich, CT: JAI Press, 1987.

This book offers nine studies on fundraising in nonprofit organizations. Two cases discuss different aspects of preparing for public library fundraising. One chapter focuses on fundraising for a research library. This chapter is by Joan Hood and describes in general detail her early fundraising work at the University of Illinois libraries.

Flanagan, Joan. Successful Fundraising : A Complete Handbook for Volunteers and Professionals. 2nd ed. New York: McGraw-Hill, 1999.

There are now more than 1 million nonprofit organizations in the United States. The fundraising industry provides one in every ten jobs and is one of the fastest-growing segments of the economy. In *Successful Fundraising*, nationally recognized expert Joan Flanagan gives readers the information they need to capture a fair share of available fundraising dollars. Community volunteers and professional fundraisers alike will find helpful tips and advice on time-proven fundraising techniques and the most profitable new ways to successfully raise money.

Drawing on her experience in leading fundraising workshops for nonprofits, Flanagan has written a practical manual that will be of use to both novice and experienced fundraisers in all types of organizations. She provides an overview of all the possibilities--memberships, big gifts, planned giving, product sales and cause-related marketing, and foundation grants--and gives specific examples of strategies used by large and small organizations. Flanagan is also realistic about moving from dreaming about money to going out and getting it. She includes an annotated reading list and offers a good discussion of the resources provided by the Foundation Center and other organizations. In these lean times, nonprofits must know every revenue source. This book identifies those sources and offers ethical and profitable strategies for tapping them.

Hoffman, Irene M. "Factors for success: Academic Library Development Survey Results – Statistical Data Included," Library Trends, Urbana: Winter 2000. Vol. 48, Iss. 3; p. 540.

This article gives the reader a distinct idea of the characteristics of the people who take on the challenge of devising and implementing a fundraising campaign for their library. Hoffman, as part of the California State University System, helped to formulate and execute a nationwide survey to distinguish who is doing the fundraising, what is actually occurring in fund-raising programs, how they are managed, how much money do they raise, what are the funding priorities and what programs seem to work. They also find the factors that help determine the success of a well-run campaign. Hoffman reveals interesting results regarding the characteristics of professionals in the academic library – educational background, degree status and salary range, experience in fund-raising. The fund-raising program itself is also surveyed and results given as to the age of the program, the goals and cost of fund-raising, library donors, friends and advisory groups, size of the donor pool and top fund-raising priorities. The actual survey used to compile the statistical evidence throughout the article is included at the end.

Latour, Terry. "Study of Fund Raising Activities at Colleges and Universities in the United States" Ph.D. Dissertation, Florida State University, 1995.

Latour examines the art of fundraising in academic libraries. He summarizes data obtained in a study designed to investigate how inundated (or not) fundraising activities are at academic libraries in the United States. The population of the study consists of academic libraries in which the learning institutions are private or public and offering a four-year baccalaureate degree. Data from the study helped to determine what character these fundraising activities take, how they vary with sizes and types of institutions, how success may be correlated to these and other variables and to determine what impact these efforts have on library programs and operations. Conclusions of the surveys conducted help prospective library directors who are going to embark on a campaign to raise funds for their academic library. This document will be helpful as a preliminary tool in determining which type of fundraising may be best for their library. Whether it be seeking private funds, having a library component within an institution-wide fund raising campaign, seeking government grants, sponsoring a friends group or holding a used book sale, perusing this document and observing statistical evidence of others can help a director in charge make sound decisions before advancing into the realm of fundraising.

Martin, Susan K. The Changing Role of the Library Director: Fundraising and the Academic Library. Journal of Academic Librarianship. (1998) 24, 3-10.

A veteran director and library fundraiser describes the role and responsibilities of the director in library fundraising and offers sage advice about setting priorities and delegating responsibilities to accommodate competing demands.

Martin, Susan K., Ed. Library Trends. 48, no. 3 (2000). A special issue on development and fund-raising initiatives.

This special issue of *Library Trends* offers excellent coverage of the principles and practices of library development. It looks at the distinctions between development activities in academic and public libraries and infers some trends for the future. The collection includes articles on the organization, process and politics of fundraising, results of development surveys, annual fund programs for libraries, friends groups, philosophy of public relations, public library entrepreneurs, and cybergifts.

Steele, Victoria. Becoming a Fundraiser: The Principles and Practice of Library Development. 2nd ed. Chicago: American Library Association. 2000.

This resource provides all the essentials for a library director to bring development and fundraising to the necessary level to lead an effective campaign. This second edition helps direct the library director who has first attempting a fundraising campaign. It provides valuable insights to help you (the director) to understand your purpose and uniqueness and to know your niche – what defines your library. Steele formulates ways of setting meaningful goals, building a winning development team, developing donor profiles and prospects, communicating your library's mission and how to approach major donors with confidence and specificity. Two major concepts are referred to - the art and science of fundraising. The science part is the statistical end of development and the art side is the concept of understanding donor psychology. To best identify a donor Steele uses the philosophy of MAGIC – means, age, giver, involved and contacts. Detailed explanations of this concept will help the library director make wise choices. For a new director or person heading a fundraising campaign, this book should be read before any other.

Swan, James. Fundraising for Libraries: 25 Proven Ways to get more Money for Your Library. New York: Neal-Schuman Publishers, 2002.

This guide brings the great principles of fundraising into focus and clearly illustrates 25 proven techniques you can put to work for your library. Matching donors with funding opportunities, conducting auctions, soliciting donations on the Internet, lobbying legislatures, managing direct-mail campaigns, applying for grants, and many other become true possibilities in Jim Swan's enjoyable presentation. Highly recommended for all libraries. (Library Journal)

Friends of the Library

Dolnick, Sandy, ed. Friends of Libraries Sourcebook, 2nd Edition (ALA Editions), Chicago: American Library Association, 1990.

This sourcebook is your one-stop resource for organizing and managing your library's valuable Friends group. Editor Sandy Dolnick, the leading Friends authority, supplies vital tools and tips to coordinate your library's Friends. With times changing in the library friends are more relevant and important to a library's success than ever before. This edition develops new areas, such as computer literacy, literacy programs, and academic, school and special library Friends groups and it addresses Internal Revenue qualifications. Since the book was established to help both new and established Friends groups, noteworthy ideas from the first edition are repeated and many new ones added. The book itself is a bible to for those forming a new friends group, providing advice on how to get organized, defining who friends are, how to gain tax-exempt status, using friends to help in the corporate environment as well as programming, fundraising and even lobbying and legislation. There is a chapter containing sketches of a variety of Friends organizations. Packed with real-life examples of how Friends from around the country support their libraries, this handy guide also includes appended information on Friends of Libraries U.S.A. Constitutions and Bylaws, Constitutions, Articles of incorporation and bylaws and Computer information.

(An updated version of this book was published in 1993 and includes more updated information for Friends. It explains the intricacies of the Section 501(c)(3) tax-exempt status for cost-effective fundraising and gift shops, sample constitutions, and Friends of Libraries U.S.A. Fact Sheets.)

Herring, Mark Y. Organizing Friends Groups: a how-to-do-it manual for librarians. New York: Neal-Schuman Publishers, Inc., 1993.

This book offers step-by-step advice on how to form or restructure friends groups in academic and public libraries. Herring covers establishing and organizing a steering committee, marketing, communicating with

your membership one-on-one and via newsletters, advocacy and support, event programming, publicity, affordable feasibility studies, perpetual programs, and more.

Beginning chapters cover the basics of why libraries should have friends groups, how to get them organized, and importance of establishing a strong executive board. Herring cites numerous examples of successful friends groups across the country. He sees three main roles for friends organizations: advocacy, volunteerism, and budgetary support. In further chapters Herring discusses the important elements needed to raise significant funds. He stresses the value of “communication as key ingredient—perhaps the essential—to a successful friends program.” Communication vehicles addressed include the Internet, newsletters, e-mail, e-zines, written correspondence, or one-on-one discussions. He devotes one chapter to advocacy. A valuable book, not only for librarians but also for the leaders within a friends group. A special section shows how to use the Friends Group's Web site to raise funds. An added feature of this edition is the set of practical exercises offered at the end of each chapter. Most examples cited by Herring are in an academic setting.

Herring, Mark Y. Raising Funds with Friends Groups: A How-to-do-it Manual for Librarians. New York: Neal-Schuman Publishers, Inc., 2004.

When Herring decided to update *Organizing Friends Groups* (1993), he affirmed to bring the importance of Friends up to date with current trends of the library. He focuses on all libraries but issues a special call to academic libraries. His primary goal is to move those predisposed to forming groups to initiating them. Chapters cover indispensable information about successful ways to start and maintain a group where none exists. He offers advice on the sound essentials of why to build a group, identifying the variety of groups, and explains how they solve problems. A portion of the book describes the role of FOLUSA – Friends of Libraries U.S.A. He explains how using the Web enhances the fund-raising capabilities of friends groups. He looks at communication - both conventional, such as newsletters and some not-so-conventional means, such as e-zines, Web sites and even blogs. A group starter kit located at the back of the book includes 2 key documents – one outlines the content of how to address bylaws, the second summarizes what the Friends Coordinator needs to be aware of when starting a group. Each chapter closes with a box called “At a Glance” reinforcing the main ideas of each chapter. Herring brings the topic of developing Friends groups up to date and helps the reader use this instrument to model their own group and make it successful, given the scenery of today’s library.

Reed, Sally Gardner. Friends of Libraries U.S.A. 23 Feb 2005. <http://www.folusa.com/>.

This website is a must for anyone who plans or already has a friends group in their library. This fee-based organization’s cost is nominal compared to the benefits you will receive through the innovative ideas available and sharing with others. As a member you have access to additional information via a simple click on the designated “Friends Zone.” General information available includes fact sheets on how to organize a friends group, revitalizing your friends, keeping accounts (as a non-profit organization), getting and keeping new members, board development and diversity. FOLUSA has an idea bank filled with the best ideas from its members. They include promotional strategies, details on advocacy and public relations, book sales, fundraising, programs and projects and volunteers. There is a search tool onsite for locating information you may want. You may wish to sign onto a listserv to gain wisdom and support from colleagues in the field. **FOLUSA-L listserv** allows Friends from all over the country -- in fact, all over the world -- to ask and answer questions and share best practices among Friends. The new **FOLUSA-ACA listserv** will be a clearinghouse of ideas and resources especially for Friends and librarians in academic settings. One last feature for users is the direct access to the ALA website from the homepage along with media news about Friends all over the country and the world. You do not need to be a member of FOLUSA to access most of this valuable information.

Reed, Sally Gardner. 101+ Great Ideas for Libraries and Friends. New York: Neal-Schuman Publishing, Inc., 2004.

Here are more than 100 simple, innovative, and tested marketing and fundraising ideas collected from friends groups across the country. The author calls them ‘recipes.’ These ideas embrace advocacy, fundraising, and membership campaigns, as well as programs and public awareness events, and projects to increase organizational effectiveness. Each activity includes a general description, an outline of the planning process, budget forecasts, expected results, and sample forms, graphics and logos to adapt to your own library’s needs. It also lends itself to those libraries that don’t have a friends group. A small number of library staff or patron volunteers could apply these great field-tested ideas. Programs like Hearts and Arts, Library Lovers Month, Library Anniversary Party, or Date with the Director will spark even more innovative ideas. These creative ideas can be used by any library. What works for Elm Grove Library in Wisconsin can also be used by Richmond University in Virginia. Your target audience may change, the approach may be different but most libraries tend to have similar needs. You would only need to make an adjustment. Lots of examples in illustrative form - mission statements, logos, etc. An accompanying CD-ROM will guide you and your group through the advocacy process step-by-step. The CD-ROM will tell you how to engage in advocacy for your local library and the workbook will allow you to design your own plan for action.

Taylor, Merrily. “It’s Hard to Make New Friends: What to Think about in Creating a Friends of the Library Group,” Library Trends, Vol. 48, No 3, Winter 2000, pp 597-605.

This article addresses key issues that must be considered when a library begins to create a Friends group. Taylor stresses the need to define the purpose of the group, whether it is for fund-raising or as a broader-based general support group. She answers questions like “What does the library want from a Friends group? What will be its primary role? The library may want to initiate a Friends group by first creating a constitution and bylaws, clearly setting the tone for the group’s purpose. She then details characteristics of different Friends groups to help the reader identify with their individual needs. Examples are provided of different library organizations explaining how and why they came to arrive at their Friends group. The structure and infrastructure is discussed concerning the requirements of the organization in order to support the group. Finally can the library support the Friends group in respect to providing well-planned and lively programs and publications, which reflect topics of interest to them? You could say this is the plan/considerations before the implementation of a new Friends group.

For questions regarding this annotated bibliography, please contact Joy Dlugosz at j.deluxe@verizon.net

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