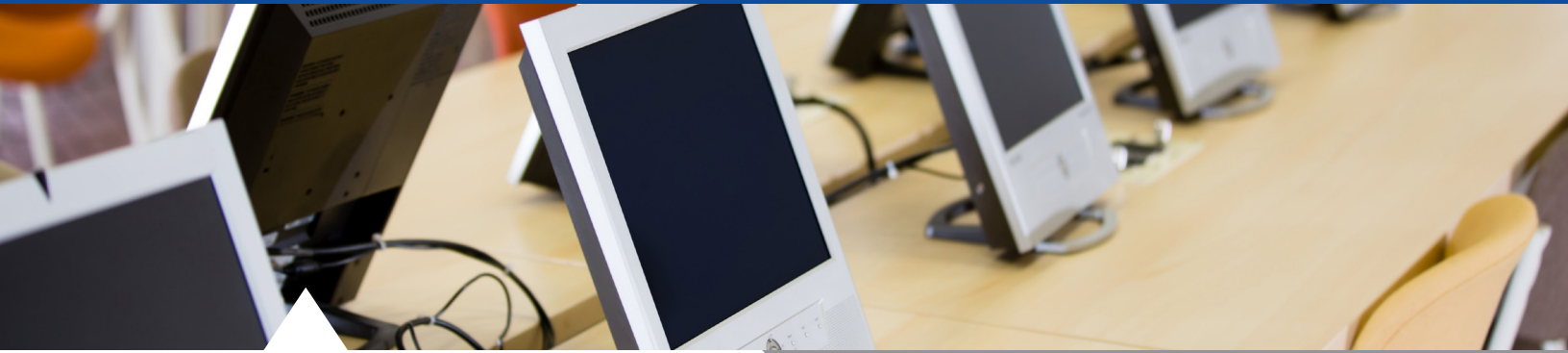


» “I discovered me in the library. I went to find me in the library.” -RAY BRADBURY

Strategic Library™



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THE BRAND MANAGEMENT AUDIT: ALIGNING YOUR STORY WITH YOUR STRATEGY

*By reassessing their value and direction,
libraries can win community support at the
ballot box.*

BY JAMES LARUE

ACADEMIC LIBRARIES AND CAREER INFORMATION

*Libraries offer many opportunities
for the campus community to explore
and apply for jobs.*

BY KATHY STEIN-SMITH

IPADS CAN AUGMENT A LIBRARY'S MISSION

*Mobile technologies expand the
scope of services libraries provide
to patrons of all ages.*

BY DEAN NORTON AND CHRIS ROSS

LIBRARIES AND RISK

*Strategically focused librarians devote
time and resources to assessing
and countering the risks that could disrupt
or cripple their operation.*

BY GUY ROBERTSON

RESEARCH DEFINES AND GUIDES LIBRARIES

BY MARY ALICE DAVIDSON

Boost Summer Reading Results with Gold Star Partners

» A pilot project turns into a home run
for the children in Elgin, Illinois.*

BY ANA DEVINE

Partnering with strategic community organizations can dramatically affect summer reading. Children may not be in school during the summer months, but they are likely to be enrolled in myriad activities throughout the community. Why not encourage them to read while they attend summer camp, park district activities, and daycare centers?

From that idea, a pilot project was launched several years ago at Gail Borden Public Library in Elgin, IL. The result? In 2013, the first year of the pilot, the number of children finishing the summer reading program nearly doubled.



FINDING PARTNERS

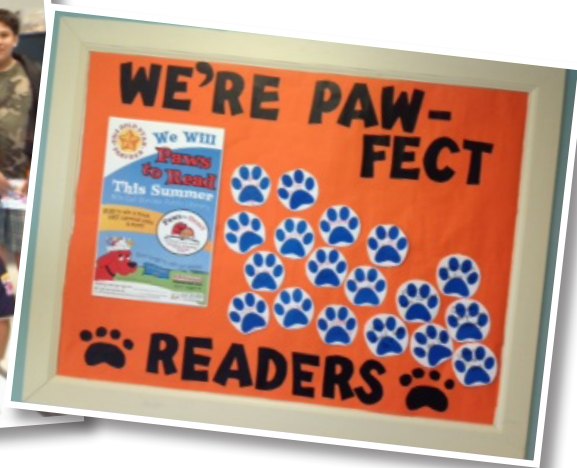
The pilot project started by seeking out organizations in the district that offered summer programs for children. Twenty-five organizations were identified and invited to



Selecting the perfect book after completing the program at a daycare center.



Middle School youth at Boys and Girls Club receive their prizes.



A Gold Star Partner shows enthusiasm for summer reading with a creative bulletin board.

partner with the library by facilitating the reading program at their own locations. The library would provide the reading logs, the books, and the prizes; the organizations, in turn, would agree to make reading a regular part of their daily or weekly programs. Everyone knew the pilot was a home run when each organization enthusiastically responded, "Yes, we will participate in summer reading to ensure children are reading this summer."

That was the launch of Gold Star Partners (GSP), which is an off-site version of the summer reading program at the library. The reading logs, incentives, and goals are the same for children participating in the program with each GSP as they are for children participating traditionally at the library.

In 2013, more than 1,600 children finished the reading program at a GSP site. In 2014, over 2,300 children finished the Paws to Read Summer Reading Challenge at a partner site; that translates to 45 percent of the total finishers in the library district. While numbers do not tell the entire story, they do inform us that perhaps the traditional model of summer reading program offerings can get a boost from community partnerships.

WHO ARE THE PARTNERS?

Organizations with whom the library had existing relationships were the first ones invited to join the pilot project. But it wasn't long before community groups started calling and asking to become a Gold Star Partner.

Daycare centers, park districts, and sum-

mer camps are obvious potential partners. But we quickly learned that thousands of children in the district attend daily programs organized by the police department, school districts, the faith community, YMCA, YWCA, Head Start, and the local country club. Any organization that served children in a summer program, or later in the season for winter reading, was invited to become a Gold Star Partner. Partners proudly display a poster bearing the GSP logo indicating to the community they've partnered with the library.

In 2014 children completing the program received a free book of their choice along with a pass to the Elgin Carnival and Elgin pool. To thank the partners for the significant role they play in the success of summer reading, a celebration is held at the end of summer in their honor.

THE KEY TO SUCCESS

In line with many libraries, the Gail Borden Public Library has been running successful, fun-packed, and kid-friendly summer reading programs since time immemorial. Librarians around the country who have also run successful summer reading programs year after year and understand the goals and outcomes may think that investing so much time working with community partners may prove unproductive.

But we found that it is precisely this investment of time and resources that resulted in the growth of our summer reading program. Organization coupled with clear and regular communication with partners has been the key to success.

Many voices echoing the same message is powerful. Now, in addition to librarians, parents, and teachers beating the drum for reading in the summer, camp counselors, daycare workers, and police officers are encouraging kids to read also.

A WIN-WIN SITUATION

The GSP model is a win-win situation for the library, for the organizations involved, and—most importantly—for the children. We found that most organizations are eager to include summer reading in their promotional materials as it communicates to parents that they are interested in weaving literacy enrichment into their programs.

For many children, completing a summer reading program at the library may be challenging, especially if they are away at camp, in fulltime daycare, or have transportation barriers. Gold Star Partners helps to remove those barriers and brings the opportunity for success to where the children are spending most of their day.

In Elgin, if children are meeting regularly in an organized setting during the summer, chances are pretty high that they will be reading, too. That's good news for the library and great news for the kids. ■

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The Brand Management Audit: Aligning Your Story with Your Strategy

» By reassessing their value and direction, libraries can win community support at the ballot box.*

BY JAMES LARUE

Much of my thinking on securing community support for the public library comes from two sources: a failed election to increase the mill levy for the Douglas County (Colorado) Libraries in 2007, and a 2008 OCLC report, “From Awareness to Funding.”

Here is the short version of the first story: In 1990 I joined one of the worst-ranked libraries in the state (based on annual library output statistics) and by 2006 I had led it to be the top-ranked library in the nation serving communities of 250,000-499,000 people (based on the Hennen American Public Library Rankings). Yet it was the year *after* this acknowledgment that our library lost its election.

The marketing of our library, while professionally done, focused on the increased library use among its constituents. Our circulation per capita was among the highest in the nation, as were library visits. Over 84 percent of our households had at least one active library card. Yet in the moment of our greatest pride, we lost an election, albeit narrowly (51 percent voted against our proposal). Why?

The reason, as the OCLC report detailed, was this: use has nothing to do with support. That is, checking out books doesn’t do much to increase the likelihood that someone will vote to increase library funding.

What does? The public must believe in the value of the library. Generally speaking, library marketing talks about services, not about what they mean. And, as a consequence, while U.S. library use has risen sharply over the past generation, support has been falling. Coincidence?

DEFINING A LIBRARY’S BRAND

Since 2014, I have been an independent



speaker, writer, and consultant. One of the services I provide, with graphic designer (and former library trustee) David Starck, is a “brand management audit.”

Many libraries, big and small, fail to provide even the most basic consistency in how they present themselves to their communities. A focused, professional review of a library’s stated direction, followed by a series of recommendations to make a library’s public communications contribute to that direction, can help libraries align their story with their strategy—in essence, develop a brand.

I define “brand” as the general public perception, both intellectual and emotional, of one’s institution. This brand may include

an expectation of what the facilities feel like, the quality of service, and in general, what the library (in this case) is *about*. Then, when funding is on the line, voters can understand why the library is important to the community and how it contributes to making their community a better place to live.

WHAT IS AUDITED

Once David and I begin working with a library, we start the audit process by conducting interviews with persons at different levels in the organization: the director, a selection of board members, and some key staff. Our questions include the following:

- What do you see as the key focuses and

» Thoughtful, intentional, professional communication increases the odds of success when seeking votes in favor of increased funding for the library.

directions of the library?

- Where are you going, and why did you decide to go there?
- What do you know about your community?
- How are plans communicated to the staff and the public?

Next, we walk through the facilities. David looks at visual presentation and graphics; I look at the clarity of library space organization. For instance, to what does the library give physical prominence: A help desk? New materials? Public PCs? Comfy chairs? Are key services advertised throughout the space or are they hidden in the director's desk drawer?

Once these initial steps are completed, we get current copies of the library's mission, vision, and long range plan. We carefully check to see if these plans reflect the answers we heard in the interviews. Also, we check to see if they appear in other venues (a website, for instance), and if they are presented consistently.

Next, we review the library's collateral materials: forms, stationery, envelopes, logo(s), external signs, internal posters and flyers, and any and all uses of the library's name.

RECOMMENDATIONS

Based on all of these findings, David and I meet to hash out whether the library's story is aligned across several dimensions. Are the director, board, and staff in agreement about the library's direction, or do different parties have very different understandings?

Alignment also applies to the facilities. If, for instance, the library has stated that one of its most important directions is early literacy, is that concern reflected in the physical layout and prominence of the children's room?

When it comes to discussing collateral materials, we find that most librarians simply haven't given them much attention. When we set a library's letterhead, envelope, staff business card, and library card next to each other, it's not uncommon to find multiple logo designs, library names, website addresses, and phone numbers—all for the same institution. This inconsistency is not only amateurish, it constitutes a

squandering of library resources. Effective communication of a library's brand requires both consistency and repetition.

We also review our client's long-range plan and may notice that, on occasion, board or staff understanding of the library's direction may diverge either from the official plan or from each other. Sometimes, those interviewed come up with an unofficial plan that is better than the one that got adopted and published on the website because it helps define a stronger brand for the library.

Following these reviews, we work up a report, which addresses the following points about how the library has viewed its brand:

- The clarity of the presentation—is the brand easy to detect and understand?
- Consistency of the presentation—is the brand uniform, frequent, and persistent?
- Quality—does the brand demonstrate an attention to high standards and best practices?

We then provide an executive summary and a grid of recommended actions to strengthen how the library presents itself, at minimum, medium, and maximum levels. Usually, the first two can be done relatively inexpensively and may indeed solve an inconsistent or vague branding problem. But providing a range of options allows the director and board to match their budgets with their priorities.

For instance, it may be that a library can clean up its graphics simply by adopting a guide to using a pre-existing logo in a consistent fashion (always the same two colors, always the same placement on a flyer). Or it may be that the logo itself is obviously dated, or the name of the library is persistently confused with some other regional service. In the former circumstance, staff can simply weed out supplies and adopt new procedures. In the latter, the library must commit to a logo redesign, devising a new name for the library and updating all of its signs and advertising.

We give the director a chance to review the recommendations and draft report, which he or she can decide to present it to the board for further discussion.

TIMELINE AND FOLLOW-UP

To date, some of our library clients have adopted the minimum recommendations. For instance, one library pulled down a cluttered and perpetually defoliating bulletin board in the foyer and replaced it with a building navigation poster. They shuffled lower, face-out shelving to the entryway, and moved the 90-inch shelving to the wall. Another library budgeted to replace, at some cost, its dilapidated external signs.

At the other end of the recommendation spectrum, still another library chose do a complete rebranding of its logo and library name.

VALUE OF THE AUDIT

Librarianship isn't graphic design, and sometimes it takes an outside eye to catch the accumulation of small changes that adds up to chaos. We make a point to ask the director and the board if they found value in the audit process. Generally speaking, the answer has been, "It gave us a template for change." Rebranding sounds big; getting immediate steps that can be taken, sorted by scope of effort, helps libraries get organized.

A consistent and professional presentation of the library's value and direction may not be sufficient to guarantee victory at the polls. Factors far outside the library's control can interfere, such as a sudden recession or last minute competition on the ballot.

But thoughtful, intentional, professional communication increases the odds of success when seeking votes in favor of increased funding for the library. And, as an immediate benefit, a clear understanding of these factors helps library workers at all levels have a better understanding of their purpose and plans. ■

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Academic Libraries and Career Information

» Libraries offer many opportunities for the campus community to explore and apply for jobs.

BY KATHY STEIN-SMITH

The picture of a college or university library that typically comes to mind includes books and journals, either print or online, a busy reference or circulation desk, and quiet group areas full of students studying or doing course assignments.

Imagine, however, that this library is also a career center, with computers and laptops that can be used both for writing resumes and for searching out internships and jobs, and with books and magazines on careers, tips on interviewing and interview questions, and resume writing examples. There is even a “Career Corner,” with recent resources on careers, including books, magazines, and newspaper classifieds. Flyers with Career Information @ the Library is on display.

CAREER RESOURCES FOR STUDENTS

The academic library is, of course, the library, and not the career development center. However, for student convenience, consider the advantages of having a career development center, staffed with career counselors, located in the library so students can read about and research careers in the same location where they can receive career development services.

This idea is not without precedent. Librarians actively develop and maintain the print and online collection of eBooks, electronic journals, and magazines on careers, and even a database on career guidance. They offer Library Research/Information Literacy instruction on careers during appointments made by faculty for their classes. They hold walk-in Library Research Clinics and have participated in team-taught sessions with career counselors.

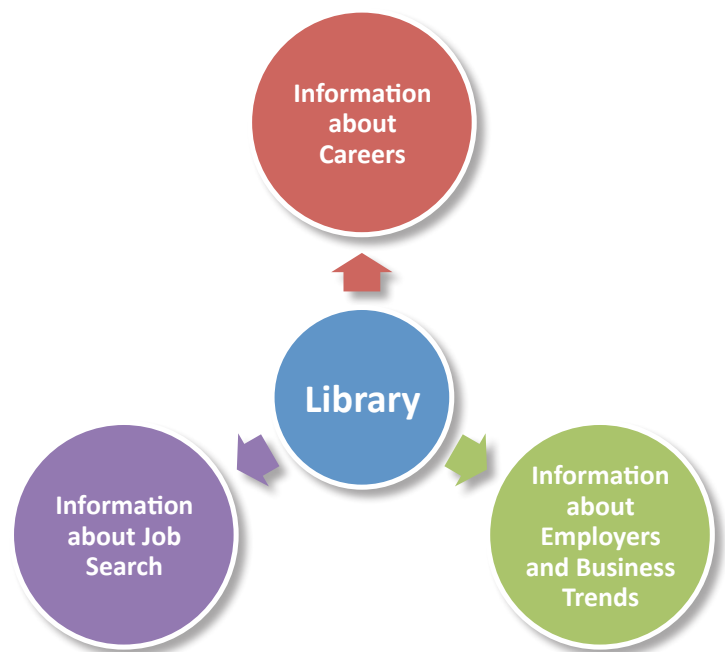
Where the mission of the library and a career development center diverge is in career exploration. Career centers typically offering an array of on-site and online resources on such topics as self-assessment,

The library: The heart of any job search.

interview preparation, and resume writing. The library, on the other hand, offers complementary collection and complementary services.

An area of the collection that is frequently overlooked by students is the business resources collection. Most academic libraries offer an extensive collection of subscription business databases for use by faculty, staff, students, and alumni. These databases include directories, classifieds, and company information.

Librarians can assist students in using these databases in many of the same ways they assist students looking for information on course assignments. By helping them to find the most relevant books, articles, and web information, librarians can encourage students to use the same analytical and critical thinking skills they use in class research assignments to explore their life's work, which will last far longer than their student years.



This assistance is especially helpful for undergraduate students who may or may not have selected a career path. Even if they think they have defined their career goals, they may have incomplete information on what a specific career really involves, what education and training is needed, and what the day-to-day work includes. A student experiencing difficulty in one of the prerequisites to the selected major or with one of the required courses may find supplemental materials to help him or her achieve success. Conversely, that student may be able to read about careers in related fields where the road to success may be more easily within the student's reach.

With the library's resources, students can develop a self-directed independent learning program on any topic, including career exploration or potential career skills, can do research on a particular company or group of companies in a specific field or region, or explore employment trends. The Readers



The Career Corner at the Frank Giovatto Library, Fairleigh Dickinson University, Metropolitan Campus.

Advisory service at the library or the reference librarians can be available whenever questions arise.

Students can learn a foreign language or a computer language using library materials. In the same way, students can learn about one or more chosen profession or the region of the country or world where they envision their professional career will unfold. Those who have not yet chosen a particular field can read about famous people they admire and how they developed their careers and achieved success.

For example, a student interested in technology can read biographies of Steve Jobs, Bill Gates, and many more to learn about the challenges they faced—and overcame—on their road to success. A young woman interested in a career in science or business can read a biography of Marie Curie, a book by Sheryl Sandberg, or any number of other books in the library that touch on those disciplines. A student interested in leadership or politics can find any number of biographies from past and present from which to draw inspiration.

For students who are not on campus, librarians can develop an online research guide for career information. The Giovatto reference librarians have developed one, which is part of the library web page: <http://view2.fdu.edu/metropolitan-campus/libraries/giovatto-library/giovatto-library-research-guides/careers-and-job-search>. They plan to expand this online guide and to develop it further.

In addition, librarians can be available to

deliver instruction via ITV or Skype to classes on faculty request. Students may also chat by phone with the librarian at the reference desk or email questions related to careers and job searches just as they would with any other type of reference question. It is important to remember that not every student has an appropriate space in the dorm or off-campus housing for reading about careers or for accessing the technology needed to search for a job or print a resume. The library offers all of these services in a secure setting seven days a week, with a librarian always scheduled to give any needed assistance.

CAREER RESOURCES FOR FACULTY AND ALUMNI

The library offers a wonderful setting for students to meet informally with successful alumni in their chosen field. The same holds true for conversations with either full-time or adjunct faculty who had a successful professional career before coming to academe. The library can even offer events where faculty and alumni are featured speakers, with an opportunity for students to ask questions and to chat with them informally. Faculty and alumni can also provide useful recommendations for the library's collection on careers.

The library-alumni career connection can be viewed from another perspective, since alumni enjoy lifetime library privileges. This means that alumni can receive assistance from librarians and use the library's collection of books, magazines, databases, includ-

ing business databases. With a valid alumni ID card, they can use the library to type resumes, complete job applications, and search for jobs through Career Information @ the Library. Alumni also enjoy lifetime privileges at the career development center and can make an appointment if they envision looking for a new position or changing their career path.

FUTURE DIRECTIONS

Open seven days a week with extensive evening and weekend hours and centrally located on campus, the academic library is ideally situated to serve as a career information resource for the entire campus community.

At the Frank Giovatto Library on the Fairleigh Dickinson University Metropolitan Campus, future collection development and library services will reflect a growing emphasis on careers and job searches. Plans include expanding the Career Corner into a full-fledged Career Information Center, expanding the online research guide on Career Information @ the Library, and developing local and regional lists of the largest employers in our local Bergen County and North Jersey region and their usual staffing needs. As our campus is located within five miles of Manhattan, New York City is within the job search area of many students. Plans also include partnering with other units on campus, including career development services and the pre-professional schools and programs, and to develop collaborative initiatives on career exploration and job searches.

Staff development options for librarians include general education on local and regional business trends and hiring, as well as increased familiarity with online resources on careers, job searches, and business databases. Librarians will also need to provide the same level of information and support to students preparing for careers that require additional or graduate education. As links between higher education and career placement continue to evolve, especially on campuses with a significant number of pre-professional academic programs, the strategic academic library will need to adapt to continue to effectively respond to evolving student and institutional needs. ■

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iPads Can Augment a Library's Mission

» **Mobile technologies expand the scope of services libraries provide to patrons of all ages.***

BY DEAN NORTON AND CHRIS ROSS

Technology continues to play an increasing role in our public libraries. The process of technological evolution in libraries has been continuing for some time, helping to extend the reach and mission of institutions that were once merely a physical enterprise.

Today, libraries offer an array of digital services. Examples include hosting their catalogs online, offering digital lending as a companion to traditional lending, and providing Internet for those who do not have easy access to it.

For some time, libraries have offered desktop PCs as a community resource for all manner of uses, such as catalog searching, children's games and entertainment, and employment services. But PCs represent challenges as a library tool. They are limited to specific locations in the building, are often only available in public clusters, and can occupy a significant amount of the limited desk space available in the facility.

TECHNOLOGY ON THE MOVE

Increasingly, library technologists are turning to mobile devices, including iPads, to improve on the computer services available to library patrons and the larger community. They see a number of immediate benefits to mobile devices. For example, tablet users can access the same resources available on PCs, including web surfing, email access, research applications, dictionaries, thesauruses, calculators, encyclopedias, medical apps, job search apps, and eBook programs. Users of such devices can move about the library, accessing a combination of traditional print and digital resources. As such, iPads are part of a "best of both worlds" strategy—the combination of print and digital—that many libraries pursue.

WHAT ARE THE ADVANTAGES?

From a usability perspective, mobile devices

have a number of advantages over the traditional PC, including the following:

- **Space efficiency:** a significant number of devices can occupy a very small physical space when stored for charging and sync.
- **Form factor:** the tablet form allows for mobility throughout the facility and a degree of privacy not possible with most PC placements.
- **Child friendly:** iPads offer a tactile and intimate experience not available on traditional PCs by engaging motor activities in a way PCs cannot match.
- **Handicap friendly:** tablets offer additional flexibility for patrons in wheelchairs, including Apple's Accessibility feature set that includes assistive

technology for vision, hearing, and physical limitations.

- **eBook reader:** the device also aligns with the expanding role of libraries as hubs for digital books.

Mobile devices also have some distinct advantages in data security and privacy. Like PCs, iPads, for example, can be configured to observe content management systems, including enforcement of content management outside the library on home networks. But unlike PCs, at present the risk of viruses and malware is extremely low, and typically such risk involves the use of iPads with untrusted computers, especially PCs with Windows software. With properly configured toolsets, iPads can



Patrons of the Garfield County Public Library see this message before they begin using the library's iPads.

» **The cost to purchase an iPad is roughly on par with a small PC and display: between \$700-\$1,000, depending on the configuration and whether the price includes a ruggedized case. But iPads require far less power to operate than even modern low-power desktop PCs.**

be recovered at the point of checkout-out and quickly reset and restored to a defined institutional standard with the removal of all patron usage data.

WHAT'S THE COST?

The cost to purchase an iPad is roughly on par with a small PC and display: between \$700-\$1,000, depending on the configuration and whether the price includes a ruggedized case. But iPads require far less power to operate than even modern low-power desktop PCs.

In 2012, a report from the Electric Power Research Institute calculated the cost of iPad power consumption to be approximately \$1.36 per year—less than the annual operating cost of a 60W compact fluorescent lightbulb.**

A number of products provide locked storage for iPads along with chargers and sync in quantities of 10 to 20 devices. For smaller institutions with a group of 10 to 20 libraries, this number can be sufficient to replace the same quantity of PCs.

But libraries are also discovering increased demand. Once they begin a PC replacement program, libraries are discovering the need to expand their mobile device populations. With a compact storage product, larger institutions can consider deploying mobile devices on each floor or at distinct service locations.

TAKE IT, BUT LEAVE IT

For institutions willing to undertake it, they can launch an iPad home check-out program. Such programs are very new, and

it remains to be seen how institutions can manage the associated risks.

iPads are not without their own challenges even for libraries who limit use to the library premises. As a mobile device, there is unquestionably additional risk of theft or loss. Locking cases can permit the inclusion of existing electromagnetic circulation security technologies or newer technologies such as RFID tags so the device cannot pass a door threshold with an electromagnetic reader.

Other strategies for loss prevention include insurance and mobile theft recovery services. Some institutions leverage laser engraving or etching to add the library logo to the device and case, which also helps dissuade theft.

As another option, iPads in kiosk installations can offer inexpensive and configurable touch-screen experiences for patrons. Uses include maps, interactive navigation aids, and interpretive tools for special collections.

WHAT HAS WORKED

Dunedin Public Library in Dunedin, Florida, partnered with Macprofessionals, which offers an iPad solution designed for libraries. When Dunedin added 10 iPads to its offerings, the initial goal was to maximize device use in a variety of programs for patrons of all ages.

Adult librarians Mark Young and Tara Dilley teach patrons how to use the iPads in a series of weekly lectures, which range from iPad Basic to advanced courses. During another course, “Tech


Time,” Dilley and another staff member provide one-on-one assistance to adults who want to use the iPads.

Students and other patrons without their own mobile devices happily participate in hands-on research at the library to determine what type of device might best fit their needs. Dilley and Young offer monthly “Appy Hour” programs to highlight new app releases and popular app trends. They also incorporate iPads in lecture-style presentations on library databases and app demonstrations. iPads are distributed and shared by patrons at these programs.

The iPads are also available to staff members who wish to familiarize themselves with the devices or with the use of library services provided on tablets. The library is also currently looking for ways to incorporate the iPads into basic reference services.

Dunedin's youth & young adult librarian, Katherine Kastanis, offers monthly “Minecraft and More” programs geared for youth ages 8-14. This program is operated by Dunedin Youth Volunteers who distribute iPads and provide STEM gaming assistance as needed. Parents may accompany their child and play alongside them using another device when available.

Kastanis also incorporates iPads during “Library Research Instruction” offered to in-house school groups. The students share and operate iPads during the database instruction. She provides iPads at monthly Dunedin Youth Volunteer meetings when highlighting new and existing databases to the group. At the April meeting, she



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» **Dunedin's librarians developed a reservation system to ensure that iPads are available for specific library programs. When not used in these programs, all 10 iPads are made available for public use in a secure mobile iPad station available for patron use on a first-come basis.**

highlighted the <http://www.Driving-Tests.org> database and offered each volunteer the opportunity to try out practice tests.

Kastanis uses iPads in a monthly STEM program titled "Grow Your Mind," geared to patrons between ages 4 and 7 years. In this offering, participants learn the basic tenets of photography and apply that knowledge with simple exercises.

Dunedin's librarians developed a reservation system to ensure that iPads are available for specific library programs. When not used in these programs, all 10 iPads are made available for public use in a secure mobile iPad station available for patron use on a first-come basis.

The station rotates between the adult and youth departments. Adults may be observed playing games, searching websites for recipes, and accessing email. Young people often interact with the iPads by playing games, watching videos, and checking homework sites. Youth appear comfortable with the devices regardless of where the station is located.

GAMES AND APPS

Garfield County Libraries in Colorado, which also partnered with Macprofessionals, started with a pilot group of ten iPads at the library and now have ten iPads at three locations. The libraries are using the iPads in a number of ways. The Silt Branch Library used the devices for a pilot program called "Code Club." iPads are pre-loaded with coding apps that allow students to control a Sphero robotic ball, write code, and design animations and games. Last year, Garfield

used iPads at all six of their library branches for a spin-off, the "Hour of Code" program.

"The Carbondale and Rifle libraries use them weekly for their teen programs, and the iPads are pre-loaded with tons of games for teens to play solo or with each other through the wireless network. Minecraft tends to be a hit," reports Stephen Tafoya, TechZone & MADlab coordinator for the Garfield County Libraries, who has been heavily involved in the initial launch of iPads throughout the system.

Recently, the Rifle Library used them in conjunction with a special Dust Bowl exhibit. iPads were loaned out with headphones so attendees could use a QR code reader to scan QR codes and listen to the audio segment for that particular part of the exhibit.

"The iPads seem to have been well received in the various library communities, especially with pre-teens and teens. Parents will often check them out and play with their elementary age children on the iPads," said Tafoya. "The Carbondale branch in particular has a diverse app collection, one that includes many apps that promote early literacy and reading."

Library personnel share app knowledge and usage with each other to spark new ideas and ways to implement the technology. Moving forward, Garfield County Libraries plans to continue to build their app collections and increase iPad use in specialty library programs.

EMBRACING THE FUTURE

Interest in mobile devices continues to rise. Over time, the role of the fixed com-

puter terminal in libraries is likely to diminish, making way for more mobile and flexible technologies. On balance, devices such as the iPad make for a compelling addition to the technology solutions offered by libraries. ■

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Libraries and Risk

» Strategically focused librarians devote time and resources to assessing and countering the risks that could disrupt or cripple their operation.*

BY GUY ROBERTSON

Risk pervades life.

Everywhere and at all times, libraries live under the threat from numerous perils. Fortunately, librarians have the time and opportunity to prepare for whatever might happen, and they possess the intelligence with which to mitigate risk. Working against them, however, is human nature, including apathy, stubbornness, irrationality, and narrowness of perception. These traits hinder effective risk planning in any organization.

Librarians are seldom trained in risk assessment and management. In many cases, they have relied on others—police, firefighters, municipal planners, insurers, public health authorities, and consultants—to prepare them for and occasionally save them from disasters, criminal activities, and other negative events.

But even when outsiders offer assistance or advice, many librarians have not availed themselves of these services. Numerous tasks must be completed in the library itself, leaving library employees with little time to devote to risk or disaster planning. Moreover, many employees admit that they find planning and any training associated with it to be onerous and dull.

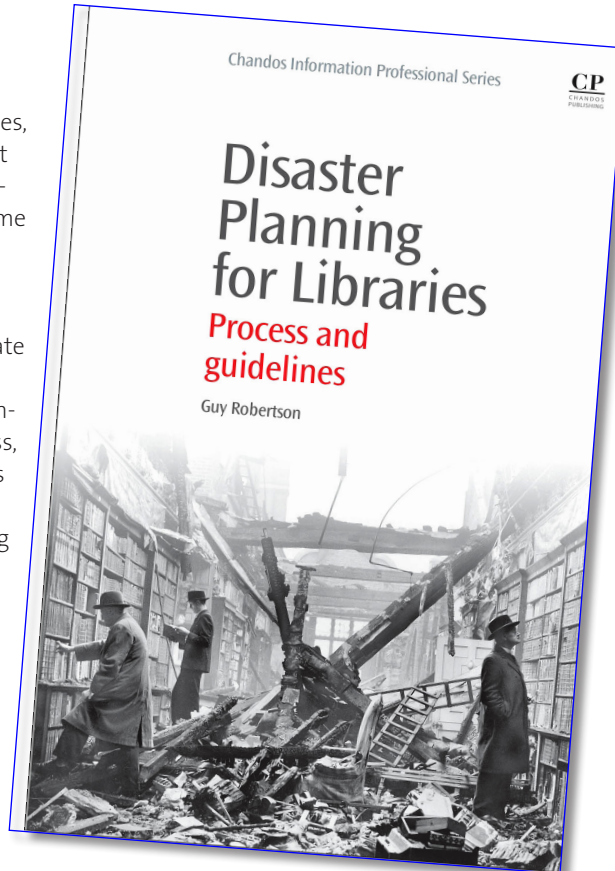
As a result, it is no surprise that so many libraries lack effective risk plans. In fact, many library employees at all levels are often oblivious to the most conspicuous threats to their personal safety and operations.

Because risks so infrequently turn into actual incidents, librarians can take their safety and security for granted. If deadly pandemics and terrorist attacks, for example, are so unlikely and rare, why bother to take precautions against them? Why

waste time, money, and other resources to protect the library from something that will probably never occur?

These are good questions, and the answer is twofold. First, if potential risks never turn into actual threats and a library never faces an emergency or disaster, then those librarians should celebrate their good luck. But having a plan that prepares for the worst at least demonstrates good sense and responsible custodianship, and all librarians are prudent to acknowledge the possibility of nasty surprises.

Second, if the risk of fire, for example, turns into a real conflagration that engulfs the main branch, it is only sensible to have a plan to deal with that loss, no matter whether it's temporary or permanent. A loss of that magnitude can obliterate offices, files, computers, and collections while displacing the employees who work with or are responsible for these assets.



WHERE TO START

The initial step in the planning process is to identify the library's risk profile, or the spectrum of risks that prevail at that site. When thinking of risks, the following options, which occur naturally, usually come to mind:

- The risk of natural disasters common in specific locales, such as earthquakes in California or flooding in cities near the Mississippi River.
- Human-caused risks such as inattention to detail or ignorance of internal policies.
- The risk of fire, smoke, and fumes, which damage collections as well as fragile IT equipment. Libraries located near farms, forests, urban gardens, or tumbleweed are especially vulnerable to this risk.
- Proximity risks caused by incidents at buildings, businesses, and thoroughfares adjacent to the library, including gas stations, fuel tank storage areas, retail shopping malls, and major roadways.
- The risk of severe weather, including winter storms, thunderstorms, high winds, and heat waves, which can lead to fires, flooding, roof damage, and broken pipes that spew water into offices and common areas.

But other types of risks cannot be overlooked in today's library environments.

TECHNOLOGICAL RISKS

"Anything that can break will do so eventually and with gusto," said a university librarian during a recent risk management seminar. With that thought in mind, four technological risks are common to libraries.

Power Outages and Brownouts. A sudden loss of power can result in darkened stack areas and much confusion among employees and patrons. Outages can affect a single building or an entire city and can last just a few seconds or several days, which can lead to library closures and the loss of data. A related risk is a power spike or surge during which electrical equipment could be

» “Libraries are truly soft targets,” said a thief who succeeded in stealing hundreds of rare books and manuscripts from North American academic libraries. “Librarians are too trusting and can take offense when you tell them they have security problems.”

overloaded and “fried.” This result will lead to the next risk.

IT Failure. This risk includes the malfunction of computer hardware and software, often resulting in unintended shutdowns. In many instances, the mechanical cause of IT failure can be difficult to detect and could be the result of other risks, such as fire, water, or severe weather. Should the library’s IT center fail, the result may lead to the next risk.

Data Loss. While data loss can be the result of accidental deletions, power outages and spikes, or even theft, they can also be caused by a deterioration of the media: an aging hard drive or a back-up tape that has been stored in an inappropriate environment.

Telecommunications Disruptions. While today’s libraries rely on a variety of communication technologies, the foundation in many locations is still the telephone system. While telephone companies worldwide are building more redundancy into their networks, there will always be the risk of disruption. An Internet shutdown could affect worldwide communication for extended periods.

SECURITY RISKS

“Libraries are truly soft targets,” said a thief who succeeded in stealing hundreds of rare books and manuscripts from North American academic libraries. “Librarians are too trusting and can take offense when you tell them they have security problems.”

The following security risks top the list of potential hazards that need the attention of librarians:

Theft. Libraries face the constant risk of theft. Library assets most often stolen include printed material of any sort, but particularly rare and valuable incunabula, early maps and atlases, noteworthy editions of famous works, and recordings by popular musicians, orchestras, and bands.

Arson. Usually the work of a lone miscreant, arson is possible at any site, including a library’s parking garage in an urban neighborhood. Recently, arson has become more common during riots and violent protests, which can either shut down a nearby library or cause it to be a safe haven for bystanders.

Bomb threats. Libraries with a moderate to high public profile are targets for bomb threats. These threats are usually made by pranksters, disgruntled employees, or hostile political activists who may disagree with a library’s mission.

In addition, the following four risks may be overlooked but more costly to a library’s staff and operations.

Workplace violence. This risk is defined as the threat of violence by any person toward another in a workplace. Incidents of workplace violence in libraries can increase during periods of high stress, low morale, or economic uncertainty. Most often, cases involve violence by patrons against other patrons or a library employee. Reports often note that the offender was thought to have emotional problems.

Hostile Intruder. This intruder may have a complaint about library services or operations. He or she may be a homeless person who uses the library as a refuge, may be under the influence of drugs, or may be a disgruntled former spouse or partner. The

intruder may act out both in employee work areas or in sections of the library open to the public.

Malware. Computer viruses, time bombs, Trojan horses, and worms are increasingly sophisticated and common. Even if the library’s computer system is protected by firewalls and user qualifiers, IT employees must be vigilant and recognize the possibility that malware attacks can occur.

Fraud or the Theft of Information. In line with most organizations, libraries can be defrauded by employees or patrons passing bogus documents and using false IDs as well as by computer hacking and scams. The confidential information stored in libraries, such as borrower’s records, can be targeted by unscrupulous employees or even international hackers who steal that information and resell it to illicit marketing operations.

ENTERPRISE RISKS

In times of economic uncertainty, enterprise risk management can be essential to continuing operation in libraries. Corporate risk managers often focus on physical risks. Managing risks in libraries, however, increasingly requires staff to focus on the following situations.

- Sudden and deep cuts to operating budgets, requiring the library to postpone important projects or cancel programs.
- Demands from boards or other authorities to cut staff and close branches.
- The loss of essential expertise and leadership.
- Lengthy union strikes or other job actions.
- Serious morale problems.

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» “You can ward off a lot of enterprise risk if you know how to respond quickly with maximum impact,” commented an academic library director. “Budget cuts are never welcome, but there are ways of managing them and their fallout. You have to be a good negotiator to manage enterprise risk.”

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Library strategic planners should consider all the risks possible in their libraries and weigh the likelihood that any of them will lead to actual events. While measuring the likelihood that an event will occur is in many cases difficult to determine exactly, all potential events should be carefully considered in a library's risks assessment.

STRATEGIC ALLIANCES

Should an identified risk actually occur and lead to a disaster, the library's business resumption, continuity, and recovery might not be successful without the assistance of external vendors. Without prior agreements between the library and key vendors, serious problems are likely to occur, hindering the post-disaster processes.

Taking into account the library's risk assessment and analysis, decision makers should consider forming strategic alliances with firms that can provide the following services:

- Structural damage assessment
- Building and site clean-up
- Site security
- IT hardware and software
- Telecommunications
- Transportation
- Off-site storage and office space
- Employee counseling
- Emergency moving and storage
- Emergency conservation of damaged books and manuscripts.

To determine what other strategic alliances a specific library might need, it is useful to ask the following questions:

- If a particular employee is unavailable after a disaster, is there another person on staff member who could replace him or her temporarily?
- If a specific physical component was unavailable after a disaster, could the library replace it with another component already available on site?
- Will the absence of a specific employee or component result in negative media coverage or inconvenience to patrons?
- Is the library prepared to incur additional expenses while the missing employee or component recovers from the disaster and is operating at normal capacity?

WHY NOT PLAN?

Many senior library administrators worry about the cost of risk management and disaster planning. They may settle for inferior plans in the hope that a disaster will not occur, at least while they remain on the job.

Also, because senior administrators may be unable to identify the weaknesses in their library's risk assessments, a lot of “magical thinking” can enter into planning. As a result, library politics can play a role in planning, and bad plans survive until disaster strikes and the plans fail.

Strategic library decision makers, on the other hand, will recognize that their risk assessment and management plans are living documents that will never be finished or perfect. The need for revisions and enhancements will be constant, and there will always be reasons to work on the plan. Any plan can be viewed as a draft, and planners

must be prepared to add, delete, reassess, and rewrite the document regularly. Today's libraries are constantly evolving their services and mission. As libraries change, so must their risk management plans. ■

*This article is based on the *Disaster Planning for Libraries: Processes and Guidelines*, distributed by Chandos Publishing. Copyright 2015 Elsevier Ltd. Used with permission.

The 200+ page book includes chapters on disaster preparedness, response, and recovery as well as tabletop exercises.

Strategic Library subscribers can purchase the book at a 25 percent discount at this site:

http://store.elsevier.com/product.jsp?isbn=9781843347309&utm_source=publicity&utm_medium=excerpt&utm_content=StrategicLibrary&utm_campaign=DisasPlanning

ABOUT THE AUTHOR: Guy Robertson lives in Vancouver and is a graduate of the University of British Columbia's School of Librarianship. He teaches library history and records management at Langara College, and information management at the Justice Institute of BC. He is also an adjunct professor at the University of British Columbia's School of Library, Archival, and Information Studies. He has lectured across North America on disaster planning, emergency management, corporate security, forgery, money laundering, and fraud prevention.

Research Defines and Guides Libraries

BY MARY ALICE DAVIDSON

A recent article in the New York Times chronicled the plight of the city's three library systems—the New York Public Library, the Brooklyn Public Library, and the Queens Library in their quest to receive \$1.4 billion in city funds over the next decade to bring all 217 branches up to modern building standards. A report released by library officials warned of “the staggering infrastructure crisis in our branches.”

The article also noted dissenting views on the modernization project. One fiscal expert questioned whether library officials should be considering downsizing in some cases, given the move toward the digital age of e-books.

Still another economist said he expected the libraries to receive “a reasonable commitment,” since they have helped expand programs for early childhood education and after-school programming, and have increased outreach to immigrants.

While their issues may not be crumbling buildings, libraries of all types across the nation face challenges in setting strategic priorities that address the needs of patrons, employees, and their communities. Three research projects, released in recent months, can help document trends that lead to new ways to provide services when faced with tight funding for capital projects and patron services.

Each report is copyrighted by its author or publisher and is used with permission. Excerpts from each report follow.

THE STATE OF AMERICA'S LIBRARIES 2015

A report from the American Library Association, edited by Kathy Rosa, Ed.D., MSLS, details concepts and trends in library systems.

Libraries demonstrate their value as community anchors by responding to issues and identifying trends that affect the community. Library collections include books and resources that represent the diversity of people, cultures, and the faraway places that make up the world we live in.



Librarians help protect people's rights by proactively supporting equitable access and intellectual freedom.

Traditional library programs, from story times to author talks, have always been popular with patrons. New forms of programming today, from makerspaces to drop-in craft activities, reflect our changing world. In 2012, there were 92.6 million attendees at the 4 million programs offered by public libraries. These numbers represent a 10-year increase of 54.4 percent in program attendance.

National Issues

The Elementary and Secondary Education Act (ESEA) is up for reauthorization in 2015. ESEA was signed into law in on April 11, 1965, by President Lyndon Johnson and provided grants to schools serving low-income students, created scholarships for low-income college students, and created special education centers. Title II of the original act included provisions for school library resources, textbooks, and other instructional materials.

But in more recent versions of the law, including the No Child Left Behind Act of 2001, library resources were excluded. The library community is lobbying to have language specifically about school libraries included in the reauthorization of ESEA.

Federal funding in the amount of \$180.9

million was approved to support the Library Services and Technology Act (LSTA) in FY2014. LSTA funding is the primary source of federal support for libraries. Most of the funds go directly to the states to support grants to public libraries.

On July 22, 2014, President Barack Obama signed the Workforce Innovation and Opportunity Act, a law that authorizes public libraries to be eligible providers with access to federal funding for effective job training and job search programs.

Copyright questions frequently arise in libraries. Federal court cases continue to favor reasonable fair use rights, especially those that add value to an original work or serve a different, socially beneficial purpose. In June 2014, the U.S. 2nd Circuit Court of Appeals upheld the ruling in *Authors Guild v. HathiTrust*, which holds that providing access to works for people with print disabilities constitutes fair use.

The Federal Communications Commission (FCC) increased the total E-Rate fund—which provides discounts to libraries and schools to help them obtain affordable Internet access—from \$2.4 billion to \$3.9 billion annually. The agency also changed its policy to make it easier for libraries and schools to deploy high-speed broadband technologies and develop network infrastructures inside their facilities.

Academic Libraries

As pressure on the higher education community to demonstrate value continues, academic libraries are meeting the challenge. Some 59% of chief academic officers rated library resources and services “very effective” — more effective than on-campus teaching and instruction, online courses and programs, academic support services, research and scholarship, administrative information systems and operations, and data analysis and organizational analytics.

The effect of academic librarians on student learning can be seen in the 2014 National Survey of Student Engagement, which reports that 33% of first-year students agreed that their experience at their institution contributed “very much” to their knowledge, skills, and personal development in using information effectively. More impressively, 47% of college seniors agreed with the same statement.

Academic librarians are working largely with reallocated funds to transform programs and services by repurposing space, migrating collections, and redeploying staff in the digital resources environment. Academic researchers are users of big data, extremely large data sets that are beyond the capability of most software tools to process and analyze. Academic librarians traditionally assess the research needs of academics; however, big data poses new challenges. The sheer quantity and rate of accumulation of data require not only new skills, but also resources to enable researchers to share, analyze, and reuse it.

Public Libraries

More than two-thirds of Americans agree that libraries are important because they improve the quality of life in a community, promote literacy and reading, and provide many people with a chance to succeed.

Digital inclusion. A comprehensive approach to creating digital inclusion will ensure an equal opportunity for all, regardless of geographic location, socioeconomic status, or any other factor. The Digital Inclusion Survey found that public libraries address these disparities by providing free access to broadband, public access technologies, digital content, digital literacy learning opportunities, and a range of programming that helps build digitally inclusive communities. The survey found that nearly all (97.5%) public libraries offer free wireless Internet access.

Technology training is offered in nearly all

(98.0%) public libraries, and nearly all offer education and learning programs (99.5%) and summer reading programs (98.4%). Almost 80% of libraries offer programs that aid patrons with job applications, interview skills, and résumé development. Three-fourths of libraries offer community, civic engagement, or e-government programs. Nearly all libraries offer patrons assistance in completing online government forms.

Digital literacy. Digital literacy continues to grow as an important library service. Research shows that families are increasing their access to digital media, but they lack the knowledge to use it effectively in a way that enables learning. Additionally, libraries are incorporating more digital media in their programming for young children.

In 2014, ALSC, Little eLit, and the iSchool at the University of Washington surveyed public libraries to learn more about how libraries are using new media in their services for youth. Initial results showed that 71% of the respondents reported using one or more kinds of new media in their programming for young children. Some 58% of libraries plan to increase new media availability in programs and services for youth.

Teen services. A major trend in program administration in 2014 was an emphasis on outcomes-based planning and evaluation. Perhaps the biggest trend in teen services in 2014 was the focus on a connected learning approach to planning and delivering activities for and with teens. Connected learning is an educational method designed to make learning relevant by focusing on the interests of the learner and connecting those interests with educational opportunities through coaches or mentors. The connected learning approach recognizes that for youth to be prepared for 21st-century jobs, they need to continue their learning beyond the formal classroom.

Space was another area of emphasis in 2014 and is an essential part of the connected learning method. The physical library space needs to be flexible to adapt to different learning activities and accommodate peer-to-peer learning. Makerspaces in particular are trending and provide evidence that libraries are continuing to evolve beyond the traditional focus on collections to a 21st-century emphasis on offering services and learning opportunities.

Public programs

The breadth, variety, and number of programs presented in all types of libraries

are growing tremendously. Today's libraries are as likely to offer children's story times as museum-quality exhibitions, compelling arts offerings, and issue-based discussions. They have responded to the growth in computer technology by providing both access and training, from coding classes to 3D printing and gadget petting zoos. They offer employment and skills-building classes to help patrons cope with a changing job market, provide services to veterans and the homeless, bring hands-on arts and learning opportunities to older adults, and offer assistance in using government services.

At the same time, libraries continue to schedule the author talks, book discussion groups, craft instruction, film programs, and other cultural and educational programs upon which their communities have come to depend. Libraries also address unique community needs, offering a neutral space for patrons, residents, faculty, and students to discuss and resolve critical issues.

Both the quality and quantity of library programming is on the rise, but tight budgets demand that library professionals justify program expenses and demonstrate an impact. This is a challenge, as little data exists to indicate whether, or how, programming affects individuals and communities.

Access the full report here: <http://americanlibrariesmagazine.org/blogs/the-scoop/the-state-of-americas-libraries-2015/>

PUBLIC LIBRARIES AND HISPANICS: IMMIGRANT HISPANICS USE LIBRARIES LESS, BUT THOSE WHO DO APPRECIATE THEM THE MOST

This product of the Pew Research Center, released in March 2015, was authored by Mark Hugo Lopez and Anna Brown. It is based on research funded in part by the Bill and Melinda Gates Foundation. (The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of the Bill and Melinda Gates Foundation.)

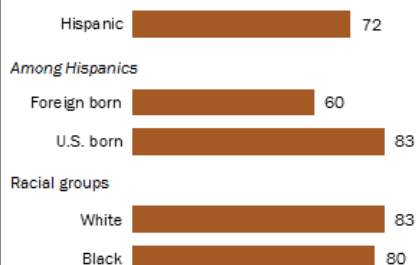
When it comes to public libraries, immigrant Hispanics pose both a challenge and an opportunity to the library community. On the one hand, this group, which makes up half of the adult U.S. Hispanic population, is less likely than other Americans to have ever visited a U.S. public library and is much less likely to say that they see it as “very easy” to do so.

At the same time, Hispanic immigrants who have made their way to a public library

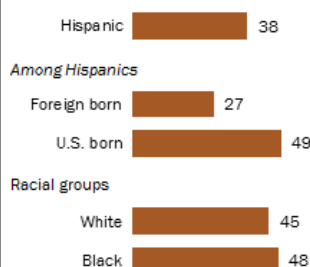
FIGURE 1

Foreign-born Hispanics Use Libraries Less Than U.S.-born Hispanics, Whites, Blacks

% who say they have ever visited a public library or bookmobile in person



% who say they have ever used a public library's website



Note: Blacks and whites include only non-Hispanics. Hispanics are of any race.

Source: Pew Research Center's Library Services Survey of 6,224 Americans ages 16 and older conducted July 18-Sept. 30, 2013

stand out as the most appreciative of what libraries have to offer, from free books to research resources to the fact that libraries tend to offer a quiet, safe space. And they are more likely than other groups to say that closing their community library would have a major impact on their family.

Access to Libraries

Seven-in-ten (72%) Latinos ages 16 and older say they have visited a public library or bookmobile in person at one point in their lives, (see **Figure 1**) a share below that of whites (83%) and blacks (80%). But this finding masks a large difference among Latinos. Fully 83% of U.S.-born Latinos say they have visited a public library at some point in their lives—a share similar to that of whites and blacks. However, among immigrant Latinos, a smaller share—60%—say they have visited a public library or bookmobile in person.

Some public library services can also be accessed remotely through library websites. Here, too, though, the survey finds a gap in use between U.S.-born Latinos (49%), blacks (48%), and whites (45%) who say they have accessed a public library website and immigrant Latinos (27%) who say the same.

FIGURE 2

Foreign-born Hispanic Library Users Rate Library Services Highest

% saying each service is very important to them and their family

	—Among Hispanics—				
	Hispanic	Foreign born	U.S. born	White	Black
Having a quiet, safe place	71	85	60	43	71
Research resources	68	82	56	39	66
Free books and media	67	83	55	49	62
Programs for youth	62	77	49	38	63
Librarian assistance	60	76	45	38	62
Internet, computers, printers	54	68	44	24	57
Help finding, applying for job	54	68	43	20	56
Help applying for government services	54	68	42	20	48
Programs for adults	45	65	29	21	46

Note: Based on those who have ever used a public library or who have a household member who has ever used a public library (n=5,661). Blacks and whites include only non-Hispanics. Hispanics are of any race.

Source: Pew Research Center's Library Services Survey of 6,224 Americans ages 16 and older conducted July 18-Sept. 30, 2013

This gap in use between foreign-born Hispanics and U.S.-born Hispanics, whites, and blacks may reflect foreign-born Hispanics' views of the relative ease of using public libraries. According to the survey, just one-third of immigrant Hispanics say they would find it "very easy" to visit a public library in person if they wanted to do so. By comparison, 60% of whites and 59% of blacks say it would be very easy to visit a public library in person.

One reason immigrant Hispanics may find public libraries more difficult to use is their language skills—more than half are Spanish-dominant, according to recent Pew Research Center surveys of Hispanics. As a result, the availability of Spanish-language materials at public libraries may be a reason, though the library survey did not ask about either measure.

Rating Services

There are more than 17,000 public libraries and bookmobiles nationwide, which together serve 96% of the U.S. population. Today's libraries have seen their role shift as they also become a community center and hub for technology.

This survey finds that among library users, Hispanics are less likely than whites or blacks to know about the services offered

by their local library. Nonetheless, Latinos who have used a library or have household members who have done so are more likely than whites to say that services libraries offer beyond book lending are important. This finding is especially true among immigrant Latinos, who are as much as three times likely as whites to say this.

For example, among library users, 85% of immigrant Latinos say that offering a quiet, safe place to spend time, read, or study is an "very important" service offered by libraries for themselves and their families (see **Figure 2**). By contrast, 60% of U.S.-born Latinos, 71% of blacks, and 43% of whites say the same. The gap between immigrant Latinos and whites is largest on services such as help finding and applying for a job, and help applying for government programs, permits or licenses. Two-thirds of immigrant Latinos say each of these services is very important for themselves and their families. Among whites, just 20% say the same about each service.

Perhaps because of the importance of library services for Latino library patrons, Latinos overall are more likely than whites or blacks to say library closings would have a major impact on themselves and their families. But here, too, the difference is driven

A Note on Terminology

- The terms “Latino” and “Hispanic” are used interchangeably in this report.
- All references to whites and blacks are to the non-Hispanic components of those populations. Whites and blacks are single-race-only groups.
- “U.S. born” refers to those who say they were born in the United States or on the island of Puerto Rico.
- “Foreign born” refers to people who say they were born outside the United States or Puerto Rico.
- The terms “foreign born” and “immigrant” are used interchangeably in this report.

by foreign-born Latinos, half of whom say library closings would have a major impact on themselves and their families, while U.S.-born Latinos’ response is more like the rest of the population.

Public Opinion

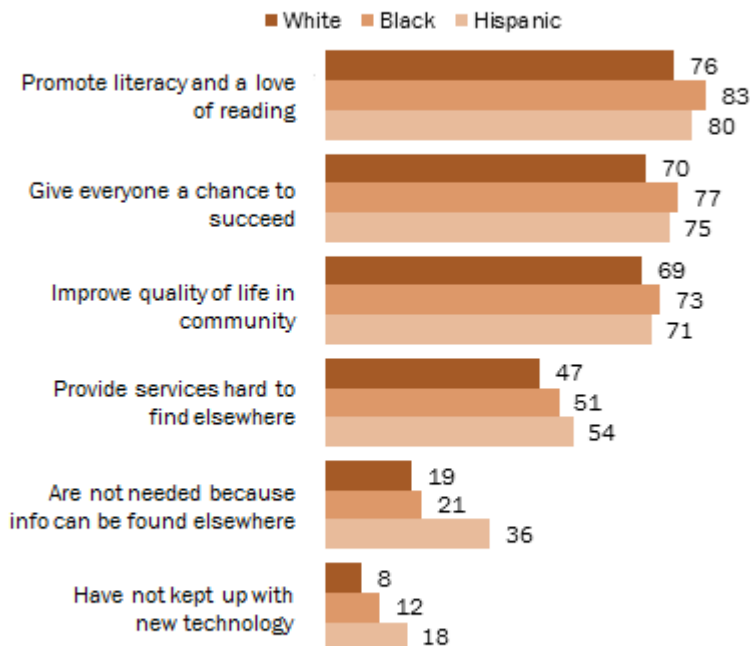
Overall, Hispanics have strongly positive feelings about the role of libraries in their communities, just as other Americans do. However, Hispanics are more likely than others to say that public libraries are becoming obsolete as a tool for finding information (see **Figure 3**).

For example, eight-in-ten (80%) Hispanics “strongly agree” that libraries are important because they promote literacy and a love of reading, a share similar to that of blacks but somewhat higher than whites. All three groups also strongly agree that public libraries play an important role in giving everyone a chance to succeed because they provide free access to materials and resources, though again the share is somewhat higher among Hispanics and blacks than it is

FIGURE 3

Overall Positive Feelings About Libraries

% among Hispanics saying they “strongly agree” that libraries ...



Note: Blacks and whites include only non-Hispanics. Hispanics are of any race.

Source: Pew Research Center’s Library Services Survey of 6,224 Americans ages 16 and older conducted July 18–Sept. 30, 2013

among whites. And 71% of Hispanics, 69% of whites, and 73% of blacks strongly agree that public libraries improve the quality of life in a community.

Among Latinos, there are some differences between the U.S. born and immigrants in their views of the roles of public libraries. For example, while 44% of U.S.-born Latinos strongly agree that libraries provide many services hard to find elsewhere (a share similar to whites) 63% of immigrant Latinos express the same views. When it comes to whether public libraries improve the quality of life in a community, 77% of immigrant Latinos strongly agree that they do, while

65% of U.S.-born Latinos say the same, as do 21% of blacks and 19% of whites.

The nation’s Hispanic population is its largest minority group. Today, more than 54 million Hispanics live in the U.S., making up 17% of all Americans. Hispanics are also younger than other groups. Among Hispanics, the median age is 27 years, which drops to 18 years among U.S.-born Hispanics. By comparison, the median age for non-Hispanic whites is 42 years.

Access the full survey here: <http://pe-whispanic.org/2015/03/17/public-libraries-and-hispanics/>

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» 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.

PERCEPTIONS 2014: AN INTERNATIONAL SURVEY OF LIBRARY AUTOMATION

This eighth annual report, by Marshall Breeding, provides evaluative ratings submitted by individuals representing over three thousand libraries from 80 countries describing experiences with 154 different automation products, including both proprietary and open source systems. The survey results include 994 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 strategic 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 overemphasize 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.

Access the full survey here: <http://www.librarytechnology.org/perceptions/2014/> ■

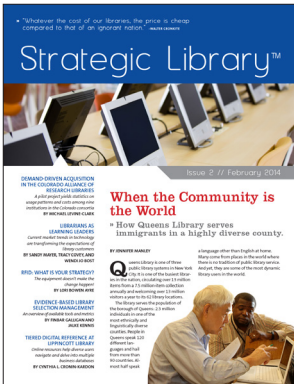
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