

» “The richest person in the world – in fact, all the riches in the world – couldn’t provide you with anything like the endless, incredible loot available at your local library..” –MALCOM FORBES

Strategic Library™



REACHING OUT TO SPANISH-SPEAKING PATRONS

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SOY CULTO Y SOY BILINGÜE

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Why Is Library Fundraising Unique?

» To be successful, the role of the library development officer requires strategic leadership and planning.

BY SAMUEL T. HUANG

Academic library professionals are facing a rapid pace of change and challenges. New methods of discovering, retrieving, and using information have led to increased expectation from users, and technology has changed the way materials are acquired, accessed, used, and conserved. Libraries need to find a balance between a shrinking library budget and the cost of meeting customer needs. Faced with this

reality, academic libraries need to raise their own funds to close that gap, making library development programs unique.

I participated in three library campaigns at different institutions where construction of a new library was not the campaign goal. I began my fund-raising career in 1994 while serving as head of the Rare Books Collection and Special Collections at Northern Illinois University Libraries (NIU). The goal of that library development project was \$1.5 million. Through collaborative efforts



Grants & Funding

PROGRAM	SPONSOR	CLOSING DATE
National Leadership Grants for Libraries (NLG) support projects that address challenges faced by the library and archive fields and that have the potential to advance practice in those fields. Successful proposals will generate results such as new tools, research findings, models, services, practices, or alliances that can be widely used, adapted, scaled, or replicated to extend the benefits of federal investment. DETAILS	IMLS	10/13/2014
The Margaret Edwards Teen Collection Development Grant awards \$5,000 for a library to use towards improving or expanding its teen collection. Funds may be used for print, non-print and/or digital materials. All personal YALSA members who represent a public library or school library are eligible to apply. DETAILS	YALSA	12/1/2014
The Sparks! Ignition Grants for Libraries are a special funding opportunity within the IMLS National Leadership Grants for Libraries program. These small grants encourage libraries and archives to test and evaluate specific innovations in the ways they operate and the services they provide. Sparks Grants support the deployment, testing, and evaluation of promising and groundbreaking new tools, products, services, or organizational practices. You may propose activities or approaches that involve risk, as long as the risk is balanced by significant potential for improvement in the ways libraries and museums serve their communities. DETAILS	IMLS	2/14/2015
Nurturing the Children initiative focuses on two key issues: educational enhancement and childhood bereavement programs. DETAILS	New York Life Foundation	Ongoing

of the library dean and Friends of the Library, that goal was achieved in two years.

In 2000, I was employed by the University of Arizona (UA) to reach a library campaign goal of \$7 million. With the support of the UA Libraries dean and close working relationships with the library Friends group and the librarians, the UA libraries was able to exceed its campaign goal in five years.¹

After completing the campaign at UA, I accepted a similar position at the University of Florida (UF) in March 2008. This campaign differed from the previous two because the UF campaign had already begun when I was hired. Working with the current library dean, the Library Leadership Board, and library faculty during the campaign was a rewarding challenge. Without their support, the completion of the \$20 million fundraising goal in five years (2008-2013) would have been unachievable.

The common goal of these libraries was to raise funds to offset operational deficits, create library endowments, name existing facilities, and enable library expansion to meet users' needs with cutting-edge technologies.

In each case, the library capital campaign goal was to advance the university's mission, which made the library campaign unique. Libraries strive for the university administration and the university foundation to believe that any great institution needs a great library and to realize that the library is

the blood and soul of any university. Libraries, like few other academic units, touch almost every individual student and faculty, and directly enhance students' learning, faculty teaching, and the intellectual needs of the university community.

When the university's focus turns to the capital campaign, libraries are at a competitive disadvantage with other academic units on campus because the university library does not have alumni. College deans, university administration, and the university foundation tend to believe alumni will only contribute to the college or school from which they graduated and not to the core service units, such as the library.

It is true that nobody ever graduated from a library. It is also true that nobody ever graduated without a library. It is undeniable that the library supports every discipline on campus, and it can be viewed as a place of history and value on campus—even a campus icon.

LIBRARY-SPECIFIC FUNDRAISING

Library fundraising is quite new in the library profession. Fifteen years ago, raising funds dedicated solely to an academic library was almost non-existent. In general, development was not one of the library dean's responsibilities, and libraries did not need go outside the university setting and compete with other colleges for funding.

As a result, library administrators and

librarians often have limited development experience. This fact makes the library campaign unique because library fundraising is under-developed in comparison to that effort within other colleges.

In addition, major donors typically are assigned to schools and colleges by either the university foundation or the alumni association. With this mindset, the library's constituency is limited to a small number of major gift prospects. Those tasked with library development even feel fortunate if the university foundation provides a list of people who are not particularly promising for their purposes, such as alumni who have never given to the college from which they earned a degree. In spite of these disadvantages, the library development campaign becomes exclusive and challenging for the library administration and development officer.

Another challenge for library development officers is their unique reporting lines. Most development offices are situated in the library but report to both the library dean and the university foundation's vice president of development, and it is important to develop a close working relationship and rapport with both.

Working within such a dual reporting system, I was very fortunate to have had two empathetic vice presidents of development at both UA and UF. They realized that the library is different from other colleges,

Costco Wholesale's grants focus on programs supporting children, education and health and human services. DETAILS	Costco Wholesale	Ongoing
\$100 of Free Books. Every month, Enslow Publishers, Inc. chooses a winner to receive \$100 worth of any Enslow titles. Books are available for K-12. For a chance to win, entrants must fill out an online form. (No purchase necessary.) DETAILS	Enslow Publishers, Inc.	Ongoing
The mission of Bank of the West's Charitable Investments Program is to help meet the needs of the communities we serve by supporting nonprofit organizations dedicated to improving quality of life, particularly for low- and moderate-income individuals and communities. Our focus is, job training and vocational programs, including literacy and basic-skills education, for low- to moderate-income adults and programs that promote civic engagement. DETAILS	Bank of the West	Ongoing
Emerald Research Grant Awards. This grant is awarded to individuals seeking support to conduct research in business librarianship. DETAILS	Emerald Group Publishing	Ongoing
The Frances Henne Voice of Youth Advocates Research Grant recognizes a school library media specialist with five years or less experience who demonstrates leadership qualities with students, teachers and administrators, to attend an AASL conference or ALA Annual Conference for the first time. Applicants must be AASL personal members. DETAILS	YALSA/VOYA	Ongoing
Loleta D. Fyan Grant. Loleta Fyan, 1951-52 ALA President, bequeathed funds to ALA with the intent that "these funds be used for the development and improvement of public libraries and the services they provide." DETAILS	ALA	Ongoing

and were willing to help identify several university donors who have multiple interests and were not solicited by their graduating college. I was introduced to these donors, and through instigating a careful and well planned cultivating strategy, the UF Libraries was able to endow the first directorship in the UF library history.²

INITIAL SUCCESSES

While at NIU in 1994, I developed a close relationship with library faculty and staff, teaching faculty members, scholars, and researchers. Because of the nature of my work with special collections and my relationship with these stakeholders, several teaching faculty members and scholars started donating their personal literary collections to the library. These in-kind gifts prompted the library dean to release 20 percent of my professional time to development and to add a paraprofessional position to initiate the library fundraising program.

In 1995, the Academic Library Advancement and Development Network (ALADN), an informal professional organization, was formed. The organization offered networking and mutual problem-solving for professionals involved in advancement and development for academic and research libraries through annual conferences, electronic listserv participation, and personal contacts.³ Without previous professional training in development, I learned many

techniques from this network.

It is often said that any successful library fundraising program begins at home. In their article "Grateful Recipients: Library Staff as Active Participants in Fundraising," Ruggiero and Zimmerman state that three things must happen, "...they [library faculty] must buy into the importance of private funding to the library; they must acquire a basic understanding of development principles, processes, and local guidelines; and they must be able to communicate knowledgeably and enthusiastically about their work and about the library as a whole."⁴

At NIU, the library dean demonstrated his strong interest in being involved with the library development effort.⁵ He encouraged associate deans, library faculty, and staff to participate. With the dean's leadership, I was able to gain full support from library faculty and staff.

Successful fundraising is not magic; it is simply hard work on the part of the library dean, development team, and every staff member in the library. The library dean and the development team prepared a case statement for the campaign with vision, innovation, and objectives to motivate potential library donors to give. The statement was a wonderful mechanism by which to promote the plan, and it was easier to forecast the outcomes because the library program needs were clearly defined.

The focus during the first year of NIU

Libraries' campaign was to build a broad donor base. The initial step centered on revitalizing the Friends of NIU Libraries group. The majority of its members were loyal library supporters, but they had not been involved with a library fundraising campaign. Increasing the Friends membership numbers was the library's primary goal.

Initiating a productive Friends group required strategic and cultivated planning to enable them to be a productive and effective organization. Under the dean's leadership and the library faculty's support, membership in the Friends grew by approximately 200 percent, from 183 in January 1995 to 383 by December 1995.

As the Friends membership grew, library administration and the Friends agreed on a reasonable fundraising goal of \$1.5 million in two years. To achieve that goal, the Friends formed four committees: membership, program, endowment, and book sales. The composition of the committees included successful business persons, community leaders, a former university president and provost, teaching faculty, students, and alumni.

It was clear to all involved that the library had a lack of constituents and needed them to step forward to help the library build a large donor base. It was their understanding that the library needed several large endowments to continue building resources and to keep abreast with constantly evolving tech-

nology. They recognized that their charge was to raise funds to enhance the library's independence. They realized the importance of an endowment that would support the library's long-term need for resources.

As a group effort, the Friends of NIU Libraries established the first endowment, a legacy of their support. The president of this group also encouraged individual members to establish personal endowments in their subject of interest.

ESTABLISHING FRIENDS

At the 2014 ALADN annual conference, Friends of the Library was a topic debated among several library deans and development officers. After the conference, numerous questions and concerns were posted in the ALADN Listserv. The major concern was the time and effort required to maintain a Friends group. Comments even questioned the wisdom of libraries forming a Friends group.

Ultimately, the decision to form such a group has to rest with the library dean and development officer. In her article, "It's Hard to Make New Friends: What to Think About in Creating a Friends of the Library Group," Merrily Taylor covers the key issues that must be considered as a library begins to create a Friends group.⁶ Points to consider include the group's basic purpose to infrastructure issues such as staffing, programs, and operating costs. Taylor makes the case that the success of a Friends group depends on the care with which these issues have been identified and addressed.

Taylor's article also points out that maintaining an effective and proactive Friends of Library group not only requires the library dean's support but also the dedication of the development officer as a liaison to the group.

TRUST LEADS TO DONORS

It is common knowledge that fundraising is relationship building. It takes time to build a relationship and earn trust from donors and university colleagues. To achieve this goal, the development officer must develop collaborative efforts and build close relationships with the university's central office, the directors of development of other colleges,

Friends of the Library board and volunteers, the university athletic association, and the alumni association.

To earn trust internally and externally as an advocate for the library, I worked diligently to earn the respect and support of the vice presidents by demonstrating performance outcomes. For example, in my weekly report to both the vice president and the library dean, I stated that many face-to-face visits I had made and how much money had been raised toward the campaign goal. The fact that they understood and appreciated the uniqueness of the library made a great difference in achieving the library campaign goal. Based on experience learned at three institutions, I believe the library dean, the VP of development at the university foundation and volunteers are a vital contributing force to any library's campaign success.

DEVISING A PLAN

Universally, a capital campaign is referred to as a "brick and mortar" campaign. In reality, how often does "Build a New Library" appear on the university capital campaign's priority list? If there is no new library construction, the library's campaign is not the university's priority.

In these cases, a well-identified library campaign plan becomes critically important. Every campaign relies on a concrete road map, agenda, and expectations with the time frame established for the library dean and development director to carry out. In development, making the case means articulating what the needs of the unit are and how private support can meet those needs and improve education conditions for students and faculty. Articulating these points becomes an important task for the library administration, faculty, and staff.

Based on my experience, when new library construction is not the focus of the plan, the ideal strategy is to create major endowments to improve and implement the library programs. When preparing a library endowment proposal for a specific unit in the library, the first step is to consult with library constituents to understand their needs. Building good relationships and trust among library faculty and staff will

be one of the major factors in establishing worthwhile endowments. Faculty can define the purposes of the endowment to match donors' interest. It is wise to create an endowment with a broad scope, which will provide flexibility for library administration and faculty to use the fund effectively.

Endowments will bring in a steady income to increase the library's purchasing power in perpetuity. Generally, a new endowment will take at least three years to generate minimum income to be used by library faculty. The library development officer should work with the manager of each endowment to produce an annual report to donors showing, for example, what materials had been purchased with their money, what new programs had been created for students as a result, and how much money still remained in the account. When donors can visualize the impact of their investment, additional gifts may follow—a joyful reward for both the library and the donor.

Also, when opportunities arise, partnering with other campus development directors to create an endowment mutually benefits both the college and the library. For instance, an endowment can be created by offering a student internship at the college. The intern can be assigned to assist the library to process the donor's in-kind gifts related to their college's subject interest. In this collaborative effort, the donor is happy that the gift not only benefits his or her college, but also makes library material available for wider access.

DEFINING ROLES

Ruggiero and Zimmerman described the pros and cons of involving library staff in fundraising.⁷ Once again, the library dean plays a crucial leadership role in getting library faculty and staff involved.

In her article, "The Changing Role of the Library Director: Fundraising and the Academic Library," Susan Martin writes, "... the success of the library will depend, in large part, on the willingness of the director to be aggressive, both within the university to gain the attention of the administration and the appropriate priority within the institution, and outside the university when

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approaching donors and potential donors.”⁸

It is the library dean's role to build support from the university president for the library. When opportunities arise, the dean should invite the president to library special events. It is the library's responsibility to share with the university the ways in which the library benefits the entire university community. The library dean should not hesitate to ask donors for the money needed after the development officer has laid the groundwork through cultivation.

Donors often prefer to give a major gift to a library dean rather than to a library development officer. Deans have a busy schedule, but they should be willing to set aside time to meet with the development officer individually as often as possible. It is wonderful if development officers are invited to attend regular dean council meetings, but such meetings are informational and do not offer the opportunity to have a face-to-face discussion of the progress of development programs.

As development officers, we all feel the necessity for deans to be aware of our progress with donors through cultivation and stewardship. It is significant to a development officer if the library dean and VP at the university foundation are actively involved in making an “Ask.” After the gift commitment, we all wish that the dean would write a personal “thank you” note and keep the development officer informed about it. A little praise from their dean will motivate development officers to do more and will help underpin success.

In the final analysis, however, the library development officer is indisputably the key to a successful campaign. According to a recent survey via ALADN listserv, a few current library development officers do not have previous library experience. Under this circumstance, they have to be willing to learn the library system and library resources. This exercise will prepare them to answer questions accurately regarding the library when asked by donors. Again, building a good working relationship with library faculty and staff is a road map to success.

The library development officer's major responsibility is to connect the donors to

one or more life-changing events in their lives and discipline and connect them to library's projects. For example, I identified a donor who is interested in medical science research, and I was able to connect that donor with the appropriate librarian at the Health Science Center Library. Based on that librarian's work, the donor created a large endowment for the library.

Development officers have to be transparent in all areas, especially in the management of their gift. It is the donors' right to know that their investment is doing what was promised. It is the kiss of death for future gifts if a donor's gift is used for purposes not intended. Once promises are made to the donor, the use of the gift must follow through on those promises. Also, development officers should demonstrate that they are interested in the donors' personal well-being and loved ones. It gives the assurance that we care more for them than for their money.

Extensive experience in the field of development shows that once in a while special people (who happen to be donors) come into our lives and become our life-time friends. Receiving major gifts does not happen overnight. The seeds have to be planted and may come to fruition after the campaign is concluded or after the development officer has moved on to other challenges.

As library development officers, we need to have passion for the library and enthusiasm in what we are doing by being a good listener with creativity, integrity, sincerity, and compassion. In my three development positions, I worked industriously to earn the library dean's trust, which allowed me to try new ideas. Supporting an institution by raising funds through the library is always challenging, but also is always rewarding and fun. ■

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FOOTNOTES:

¹Carla Stoffle recently retired as Dean of Libraries at the University of Arizona after 22 years in this position. She has now returned to Scholl of Information Resources & Library Science as a full-time faculty member.

²Endowing the directorship of UF Health Science Center Library in 2011 was accomplished by working with the vice president of development at the University of Florida Foundation.

³ALADN is considered one of the most worthwhile organizations available for persons new in academic library development. Membership in this organization is open to professionals involved in development and advancement for academic and research libraries in North America. The University of Arizona (UA) managed and implemented the LIBDEV Listserv from its inception until 2011. Now, the Listserv is managed by the University of Florida (UF). Communications and conference announcements are publicized electronically via the ALADN website and the LIBDEV listserv.

⁴Ruggiero, Anne and Julia Zimmerman (2004) “Grateful recipients: Library staff as active participants in fund-raising.” *Library Administration & Management*, Summer Vol.18 (3), p.140 -141

⁵Dr. Arthur P. Young served as Dean of the University Libraries at Northern Illinois University, 1993-2006.

⁶Taylor, Merrill E. (2000). “It's hard to make new friends: what to think about in creating a Friends of the Library Group.” *Library Trends*, Winter, 597-605.

⁷Ruggiero. p. 141.

⁸Martin, Susan K. (1998). “The changing role of the library director: Fund-raising and the academic library.” *Journal of Academic Librarianship*, Vol.24, no.1, p.8

Reaching Out to Spanish-speaking Patrons

» Tapping into the Latino families and the community will lead to diversity in library offerings.

BY BEATRIZ GUEVARA

It's Tuesday morning, and the library is filled with more than 60 Spanish-speaking children and their parents, waiting for Spanish story time, or as they call it "los cuentos" (the stories). As they wait for the doors of the community room to open, they jump around and sing traditional children's songs in Spanish such as "Pimpón" and "El chocolate." Over the past year, the children have become friends and think of the library as their preschool, where they learn the alphabet, colors, numbers, and more importantly, the love of reading.

The library's program, officially named "Conexiones que Cuentan" (Connections that Count), is a system-wide story time in Spanish. The program is offered at various branches of the Charlotte Mecklenburg (NC) Library (<http://cmlibrary.org/>) and in community agencies by bilingual staff and volunteers.

The purpose of the program is to prepare children up to five years old from Spanish-speaking families for school through reading, music, movement, and other literacy activities. Offering the program in Spanish allows parents to feel comfortable and capable of helping their children learn by participating in their native language. They are excited to check out books, sing the same songs they heard as children to their own kids, and interact with other Spanish-speaking parents by sharing stories and learning from each other.

As a bilingual and bicultural librarian in a community where the Latino population makes up about 12.6 percent of the total population, I can confidently say that the secret to reaching out to Spanish-speaking

patrons is simple and can be summed up in one word: family.

FAMILY IN EDUCATION

Of primary importance to Latino or Hispanic families is their children's education. Parents and other family members are also interested in "salir adelante," (getting ahead) and they will frequently seek out community agencies that will help them fulfill their goals.

Because the adults usually work long

hours to provide for their family, they often feel that they don't have time to take classes themselves. Education in their native countries may have been limited, and the education system in America may be very different from the one they knew back home. However, they will make every effort to get help for their children. This goal creates the perfect opportunity for the library to not only meet a need, but also to introduce new users to the library.

At the Charlotte Mecklenburg Library, we have a homework assistance program called "Amigos de la Biblioteca" (Friends of the Library). The program is entirely volunteered by local high school students who fulfill their required community service hours by helping elementary school-age children with their homework. Although storytelling is an important tradition in the Latino culture, many Latino children struggle with reading because their access to books may have been limited for various reasons. The "Amigos" read with the children and help them complete their math, science, and other homework on a first-come, first-serve basis every

Tuesday and Thursday from 4:00 pm to 6:00 pm during the school year.

While the children are working, I make sure I walk around and introduce myself to the parents and share other library programs with them.

Many Latinos are interested in computer, English as a Second Language (ESL), and GED classes. Those three classes usually meet the most basic needs of the Hispanic community. This observation became apparent to me after working in various library systems and from sharing information with librarians around the United States. It is important for libraries to either offer these classes themselves, or partner with local agencies that will offer them at the library.

At the library where I work, we offer a four-





session Computer Basics in Spanish course that meets once a week for two hours. We cover computer basics, including Microsoft Word, Internet access, and e-mail. Students receive a folder with all the computer handouts along with flyers on future library events when they register for and attend the computer course. A simple Google search for “curso de computación pdf” (computer course pdf) also yields many results.

Patrons register for the course by either stopping by the library or calling the library’s Spanish-language phone line. Only 10 laptops are available for the computer class since it’s held in the library’s community room. However, I encourage students to register if they have their own laptop and can bring it to class. As a result, each course usually has 12 to 22 students. If the class size is larger than 10, I make sure I have a volunteer or two to assist students while I’m going over the lesson.

I make sure to call each student the day before to remind them of the class and ask if they have any questions. Many times, they may be shy about sharing a struggle they are having with the entire class, but they will open up during a brief phone call. If students tell me that they need more practice with the mouse or the keyboard, for example, I arrange for them to attend class a few minutes early to go over their concerns. Getting to know each student creates a relationship of trust that will often continue even after they complete the computer classes. At the end of each course,

I give each student a certificate of participation and register them for the next course in the series if they are interested.

In another program, Technology Tutoring, we pair bilingual students from the local university with a patron who may be struggling with completing a job application or creating a resume. In these one-hour computer sessions, tutors are able to guide the patrons and help them to successfully fulfill their goals.

The Charlotte Mecklenburg Library has also partnered with our community college to offer ESL conversation classes and with another local agency to offer regular ESL classes. This collaboration provides options for students who may struggle with their work schedule. This year, we are working on providing free GED classes in Spanish at the library through the same community college.

FAMILY ENTERTAINMENT

The Latino culture is vibrant and rich in traditions and customs from various Central and Latin American countries. At the Charlotte Mecklenburg Library, we celebrate “Día de los niños/Día de los libros” (Day of the Children/Day of the Books), Hispanic Heritage Month, and special holidays such as Christmas. By researching the ethnic make-up of the Spanish-speaking community, we have been able to serve them better.

In our community, the highest majority of Latinos are Mexican so the focus of our special programs celebrates that culture and traditions. One of our most popular



programs was a family event where we all dressed up as characters from the famous Mexican sitcom “El Chavo del Ocho” or (The Boy from House Number Eight). Library staff and volunteers presented a play based on this popular show.

Mexicans and others from Central or Latin America are familiar with this sitcom from their childhood. We then played the traditional Mexican game “La víbora de la mar” (The Serpent of the Sea) and finally broke a piñata.

More than 100 patrons attended this event. Many commented that they were excited to participate in an event where their children could take part in their traditions in a different country.

Many books can guide librarians in learning about authentic cultural events in Spanish-speaking countries. Also, resources are available through REFORMA, the National Association to Promote Library & Information Services to Latinos and the Spanish Speaking (<http://www.reforma.org/>). Its members are practicing librarians that share ideas through the REFORMA Facebook, Pinterest, and Twitter accounts.

Librarians that do not speak Spanish can partner with their library’s bicultural staff and volunteers as well as local agencies, churches, and social groups interested in serving the Latino population. Working together means that the library will be able to offer more programs and services for a more diverse community.



SUCCESSFUL MARKETING

There is often a large grassroots effort involved in marketing programs and services for Spanish-speakers. If a library's marketing and communications (M&C) department has bilingual staff, they may already have a plan in place for reaching out to this population. Usually though, each library branch has the responsibility of promoting their events.

Very few Latinos enter a library seeking library flyers, although it is important to have these available in Spanish for the patrons that do inquire, as well as to distribute in other locations. To ensure that the grammar and vocabulary are correct, an online translator, such as Google Translate, can help, but a native Spanish speaker should proofread the document as well. Joining a professional organization such as REFORMA can be a great help. It has a dedicated page for sharing library brochures and flyers in Spanish (<http://www.pinterest.com/reformaspins/library-brochures-in-spanish/>).

Local Spanish-language media such as newspapers and radio stations are another resource. Many Hispanic newspapers have a dedicated "Cartelera Comunitaria" (Community Billboard) section where they publish free events for the public. When asked and supplied with relevant details, newspaper reporters are often willing to write a feature article about a special upcoming program.

Adding a dedicated Spanish-language phone line allows patrons to call to obtain information and register for programs. About two years ago, I noticed that patrons often felt frustrated when they called a library branch and were not able to communicate with someone in their native language. I

worked with our M&C department to establish a dedicated phone number with a bilingual phone message in case I was not able to answer a call. We created a library brochure to let patrons know to call this line with questions about programs as well as their library account, renewals, and other services. I now receive more than 200 calls per month, which I manage with help from volunteers.

Additionally, the library should be present at many of the festivals offered by community organizations. The Hispanic radio stations in my community have festivals during Hispanic Heritage Month and Cinco de Mayo. The key to success is to sign up for a booth early in the planning process and always register enough volunteers to assist with the event.

Last year, we attended the Hola Charlotte festival sponsored by the newspaper *Hola Noticias*. We registered more than 200 new users for library cards, passed out more than 500 flyers, and registered patrons for computer and ESL classes. We also set up early literacy stations for children to interact with books and manipulatives.

For example, we read books about the alphabet, numbers, and shapes to the children that stopped by our booth. Each child then received a cut-out palm tree based on the book *Chicka Chicka Boom Boom*. The children used alphabet foam stickers to spell out their name, and number foam stickers to write their age. Finally, they used circle foam stickers to add "coconuts" to their palm trees, just like the tree from the book. This simple activity taught children important early literacy concepts in a fun, relaxed way. It also introduced them and

their parents to the types of programs that are available at the library.

These festivals are a great way to reach out to a large number of potential library users. They provide a good place to network with other agencies interested in serving the Latino community—and they are free.

LISTENING OPENS DOORS

Perhaps the most important aspect of involving Latino users in the library is listening to them and finding out more about what they want to see from their library. It is important to make them feel welcome and for them to know that their opinion matters.

Last year, we held community forums at various library branches to get the public's feedback on library services, programs, and materials. The one we offered in Spanish was attended by more than 30 patrons who shared their input on what types of materials they wanted the library to purchase. They also stated that they wanted to see more Spanish-speaking library staff and more library-centric information in Spanish. As a result, our library system has been focusing on purchasing materials directly from Spanish-language vendors at the Guadalajara International Book Fair (FIL) and this year, at the LIBER International Book Fair in Barcelona, Spain. More information about these conferences can be found at <http://www.ala.org/offices/iro/awardsactivities/guadalajarabook>, and <http://www.salonliber.es/>.

Each year, a group of librarians from the United States attends these conferences and offers support to new participants through an orientation and meetings that guide them through the entire process. Attending these book fairs is one of the best ways to build a library's Spanish collection. The circulation for these materials at our library branches has been steadily increasing, led by the additional titles we have added.

By listening to Spanish-speaking library users, your efforts in reaching them will be more successful and definitely more rewarding! ■

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Soy Culto y Soy Bilingüe

» A library/university partnership leads to innovative instruction for Spanish-speaking citizens and future ESL teachers.

BY ALISON YOUNGBLOOD, JOYCE NUTTA,
AND WENDI JO BOST

As library and university professionals, we have learned that some community needs are best met by a single agency, while other needs call for a coordinated partnership. Serving the burgeoning population of non-native speakers of English that move to Orlando demanded a comprehensive approach.

Recently, Orange County Library System (OCLS) received a Congressionally Directed Grant, made possible through the Institute of Museum and Library Services, which focused on the Central Florida Hispanic community. OCLS Public Service Administrator Wendi Bost, who oversaw the grant, found that patrons were requesting adult English as a Second Language (ESL) classes with an instructor. Although some OCLS library branches offered informal conversation and online language learning, a more structured course was needed.

The Orange County Library System reached out to the University of Central Florida (UCF), where ESL teacher and educator, Joyce Nutta, coordinated a doctoral program that enrolled former ESL teachers preparing to become university faculty. An initial conversation evolved into an eventual adult ESL program run by doctoral students in the Teachers of English to Speakers of Other Languages (TESOL) Ph.D. program. Alison Youngblood, a seasoned ESL teacher and doctoral assistant, took the lead in designing and coordinating the program.

The overall project is known as Soy Culto, which loosely translated means “I am cultured.” The program, Soy Culto y Soy Bilingüe, focused on being cultured and bilingual. Funds for this project were specifically focused on the Southeast and



By creating a scaffolding of language courses, Soy Culto offerings were appropriate for beginners, for those who had an intermediate level of proficiency, and for advance English learners who needed linguistic refinement for postsecondary study.

South Creek Branches of the Orange County Library System, which both serve large Hispanic communities.

Before joining the UCF faculty, Professor Nutta had been an adult ESL teacher and district coordinator. At the beginning of the program development stage, she pointed out that “students will vote with their feet. If they don’t like the program, they will never come back. You won’t get a second chance.”

Those words laid down the gauntlet. Some of our earliest conversations about the program did not actually center on educational or second language acquisition principles. Instead, they seemed like discussions from an economics course—we talked a lot about supply and demand. As a result, during the past four years, we have gener-

ated a well-balanced supply and demand for the Soy Culto y Soy Bilingüe through the following steps.

NEEDS ASSESSMENTS

In the opening scene of the movie *Stripes*, inexperienced teacher Russell Ziskey carefully writes his name on the blackboard of an ESL class, introducing himself while his adult students watch silently, without expression. Undaunted, he goes on to explain that he needs to know just a couple of things before starting the class, so he asks, “How many of you would say you speak English fairly well, but with some difficulty?” Blank stares are the only response. As his ensuing queries only lead to more confusion, he resorts to leading the bewildered class in a nonsense

choral response from the golden oldies song, Da Doo Ron Ron. When the session finally ends, Mr. Ziskey's students courteously file out of the classroom, likely never to return.

Mr. Ziskey's approach to getting to know his students, not to mention his approach to teaching, reveals his ignorance about perhaps the most crucial part of successful adult ESL programs—assessing students' needs. Without a clear understanding of who the students are, what level of English proficiency they have attained, and why they are willing to give up their very limited free or family time to attend ESL classes, it is impossible to plan instruction that meets their needs. Unlike the group in Stripes, not all adult ESL classes are made up of absolute beginners.

Within the larger Soy Culto initiative, we knew we had a unique opportunity to develop a program unlike any other within the Orange County Library System. The first step, therefore, was to make sure we understood exactly what “unique” meant in this environment, so we embarked on a two-prong needs assessments to better understand the gap in the market.

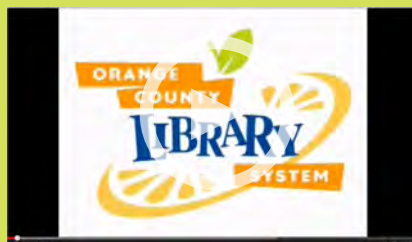
Understand the Language Programs within our Community. We conducted an “environmental scan,” which meant searching for all the available adult ESL programs in the community and assessing their features. Many of the programs fell into one end of a continuum: unstructured, free classes; or highly structured, expensive classes.

Unlike the others we found, our objective was to offer a research-based, engaging, and challenging program structured like a university course, but offered for free. Our motto became, “a free course that you would pay to attend!”

Understand the Language Programs with OCLS. We also completed a scan of the current language programs available through the library. First, we attended multiple sessions of two face-to-face English language courses already available: Practice Makes Perfect (a program supported by the local Adult Literacy League) and English Chatter. Next, we sampled or participated in the technology-based course offerings, including the ELLIS digital curriculum, an ESL on Mango Languages, and a popular take-home DVD set called *Inglés Sin Barreras*.

Following this research, we compiled a master document outlining the curriculum points in each program. We also talked with

» Click on these links to view success stories!



the various teachers to better understand the strengths and weaknesses of the current OCLS English language programs.

We noted a strong infrastructure for beginning-level learners who needed to develop survival language skills. In addition, the face-to-face courses overwhelmingly focused on the development of spoken language for beginners. The technology-based programs gave more in-depth instruction on language conventions, reading, and listening but were weak in terms of their ability to connect the skills to speaking and writing.

Results of the Multi-Level Needs Assessments. From the first two needs assessments, we knew that there was a strong need for a program that focused on listening, speaking, reading, and writing. We knew the target audience would be intermediate or advanced English learners who have mastered day-to-day communication but are unable to advance professionally or foster deeper involvement with the greater Orange County community because of language skills.

We then worked with the university to create a scaffolding of language course offerings. This process entailed identifying and building upon courses intended for absolute beginners, on to courses for those who had attained an intermediate level of proficiency, up through advanced English learners needing linguistic refinement and academic language development required for postsecondary study. It was important to

make space within the Soy Culto Program for the unique needs of students enrolled in specific sessions.

All classes are held at the Southeast and South Creek Branches of the Orange County Library System. The time schedules have varied, but most have been offered on weekday evenings.

CONTEXT-SPECIFIC CURRICULUM

The professional and academic English curriculum for the Soy Culto Program operates on two levels. First, the weekly curriculum is designed around specific communicative scenarios (see **Lesson Plan**). For example, some of the topics we cover are job hunts, interviews, parent-teacher communication, complaining and resolving problems, and making formal requests for services or information. Within each scenario, the class time equally targets all four language skills.

In addition, the weekly curriculum includes around two hours of homework per week. Homework assignments include writing cover letters, resumes, and formal business emails, grammar drills, reading assignments, and even preparation for making recorded speech samples. Students get feedback from the instructor on each homework assignment.

The homework is always presented as an added challenge for students, and they are encouraged to keep coming to class even if they don't complete the assignments. The homework is never incorporated into the following class meeting in a way that would exclude anyone who didn't complete it. However, overwhelmingly students go far beyond what they are asked to do.

INTEGRATING TECHNOLOGY

One element of the curriculum that was not identified through any of the needs assessments, but turned out to be crucial, was technological fluency. On a separate research project investigating the relationship of non-native speakers, workplace language programs, and corporate directors of human resources (HR), the university-based team members found that technology skills were disproportionately problematic for non-native speaking employees. The research found that HR directors were troubled by this communication deficit, since many employee training programs and the management of benefits have moved to a paperless system.

To help students become familiar with the needed technical skills, we created a

Lesson Plan

SESSION 1, WEEK 2

DURATION: 120 MINUTES

Objective(s):	To develop an English resume To develop confidence in answering basic interview questions: What are your strengths? What are your weaknesses?
Language domains:	Writing- Writing a resume in English Speaking- Small group work Listening- Teacher lecture
Language focus:	Vocabulary: (adj.) adaptable, driven, dedicated, energetic, detail-oriented, reliable, ambitious (verb) scheduled, organized, prepared, oversaw, developed, suggested, coordinated Grammar: Understand the difference in meaning between the simple past and present perfect in relation to sharing past experiences
Materials:	Soy Culto Session Resume Writing Part 1, Job Interview Questions Basics Power Points Laptop Sign-in sheet Example resume handouts Top 20 Grammar, 4.4 and 4.6 Tape Blank paper for group work (colored preferred)
Procedure:	Pass around the sign-in sheet. Review key points from last class. RESUME: Pass out the example resume face down. Tell students that when many employers review an applicant's resume, they look at it for 6 seconds to get a first impression. Have students flip over the resume and examine it for 6 seconds. Then turn it back over. Ask them to share what information they remember. Make 3 columns on the board Yes/No/Optional. Ask students to work in groups to come up with 2 ideas for each column related to what information should definitely be on a resume, not on a resume, and can be on a resume. Compile list as a class on the board. Begin power point and complete activities 1-5. Make sure to review notes and instructions included in the power point. JOB INTERVIEW QUESTIONS: Add the power adjectives listed under vocabulary at the top of this lesson plan to the running list on the board. Ask students to write three words in their notebook : 1. A word they 100% know, 2. A word they think they know, but aren't sure, 3. A word they don't know. Then instruct students to stand up and talk to 3 different classmates (or 2 depending on the time). They can either teach someone their #1, or someone can teach them #2 or #3. After they talk to 3 people, return to their seats. Then ask students if there is still any word that they don't know. Limit yourself to explaining 2 or 3 words...don't take the rest of the class on vocabulary. Assign any remaining unknown words to look up for homework, and make note of these words to use them as the review at the beginning of next week's class. Begin power point on Basic Job Interview Questions and completing the activities described in the notes. You must cover "What is your strength/weakness." If you have time, you can address any of the additional questions.
Homework:	1. Complete their resume and bring to class next week 2. Practice interview questions 3. Top 20 pg. 44 and 46 review of simple past and present perfect

course wiki and uploaded all the Power-Point presentations, worksheets, homework answers, and supplemental resources. During class, the websites were presented and explained, and students practiced accessing them with the teacher. Via email, students

were able to submit homework assignments and ask questions of the instructors.

ON-GOING ASSESSMENTS.

In our experience, many students who show up for class are very nervous. Many have

not set foot in a formal classroom for years, and they are unsure if the class is the right fit for them. After the first night of classes, the curriculum and activities may prove to be at too high a level for some of the students. Instead of allowing this finding to



The original intent of Soy Culto was to strengthen the relationship between the Hispanic community and the public library, and many students have transitioned into other library programs.

become a missed opportunity or a moment of discouragement, each librarian and Soy Culto instructor can explain which classes at the OCLS target beginning and intermediate level students, classes that are more flexible in terms of time commitment for those with scheduling concerns.

A final needs assessment is crucial because it reflects on curricular flexibility. Each iteration of the program brings in a unique group of students, so ensuring that the session content is flexible on a weekly basis is important.

In some sessions, all the participants have been seasonal residents of Orlando without school-aged children at home. On the other end of the spectrum, a class could be made up entirely of small business owners or individuals who expressed that they were very satisfied with their current job. In both cases, the sessions required curriculum revisions to keep these particular students interested for the length of program.

To help with fine-tuning the curriculum, at the beginning and end of each six-week session, students are asked to fill out a short survey, which covers basic demographic information along with curriculum-based items. On the entrance survey, completed during the first class, students receive a list of topics covered in the curriculum and are asked to rank them from most to least important. There is also space provided to write in topic sug-

gestions, and the participants are encouraged to do so in English or in their native language. At the end of course surveys, students are asked to identify which topics were the most and least helpful.

CLEAR PROGRAM BOUNDARIES

In developing this type of program, a lot of attention needs to focus on setting a clear ending point for the program, which is important to make students feel successful.

Because the program is associated with a university, we first experimented with a semester-based twelve-week curriculum. This schedule proved to be too long, since new students would begin to show up half-way through the semester, or current students would start to attend more sporadically in the last four weeks.

In response, we changed the length of the program to two self-contained six-week programs, and the attendance rate stabilized. The six-week time frame also supports goal-setting conversations at the beginning of class. On the first day, students generate a six-week English challenge where they come up with ways to integrate more target-language communication and exposure into their daily routine. Committing to a six-week challenge is much more appealing than a twelve week challenge!

The number of lesson plans generated remained the same between the twelve-week and six-week designs, and most students complete between two and four six-week

programs. Along with the six-week time frame, the instructors take attendance each week. Students that attend five out of the six classes receive a certificate of completion from the library.

By having a clear completion date, we were also able to help Soy Culto students transition into other library programs, such as book and music clubs and other events that match their interests outside of learning a second language. This goal dovetails with the original intent of the Soy Culto initiative: to strengthen the relationship between the Hispanic community and the public library. Since around 90 percent of our students are native-Spanish speakers, we aim to build their confidence to participate in new programs and strengthen their relationship with the library.

PARTNERING WITH A LOCAL UNIVERSITY

The partnership has yielded many mutual benefits, with opportunities to involve student teachers who must complete field experiences, observations, and internships. This addition leads to more flexibility in the budget, connects future teachers to the ESL community, and helps them understand the needs of parents who are non-native speakers.

One story of note involved an individual who had attended the Soy Culto sessions but was lacking confidence to pursue a university education; within a few weeks of completing a series, she applied to UCF, and the next time she saw her Soy Culto Soy Bilingüe instructor they were both on campus.

We continue, jointly and independently, to seek external funding and sponsorship to sustain and expand the program, and we expect our partnership to endure and thrive! ■

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A Game of Loans: Promoting Interlibrary Loans

» When the ILL desk is hidden, its services can be out of sight and out of mind.*

BY JOANNE PERCY

The interlibrary loan (ILL) sometimes feels like the forgotten love child of circulation and reference. ILL departments, like my own, typically serve thousands of students and faculty, and arrange for the borrowing of tens of thousands of books, articles, and other materials from across the world.

Yet these same departments are also frequently squirreled away—an obscure window behind the circulation desk, or an easily missed desk around the corner. Maybe ILL is not quite the Sasquatch of the library world, but interlibrary loan librarians struggle with the desire to provide better and more interactive service.

In early 2013, I surveyed a group of ILL librarians and staff members from the online interlibrary loan discussion list, ILL-L@webjunction.org. The survey included questions on where their ILL department is located, where they thought it should be located, and whether their ILL department had a public service desk.

Of the 203 respondents, the majority believed that the ILL departments should be incorporated into either circulation or reference to synchronize their operations more effectively with their more visible counterparts. Though most were housed in “technical services,” when asked where they thought they should be housed, 29 percent chose circulation, 21 percent chose reference, and only 8 percent chose technical services.

This result should not be much of a surprise because there is, after all, considerable overlap between the functions of ILL and both circulation and reference. The primary difference between ILL, reference, and circulation is that the latter both have service desks that are accessible to patrons, while



71 percent of ILL staff report that they have neither a service desk nor any other patron-accessible work space.

WHERE IS ILL?

The importance of having a service desk cannot be underestimated and it offers many hidden benefits. It gives ILL more of a voice in the library in discussions and decisions that affect everyone's workflow. It provides for more direct interaction with other departments in the library, particularly reference and circulation. It puts the library in a perfect position to provide on-demand purchasing, promote customer services, and avoid duplication of work.

The department has undergone many changes over the past ten years. It's been at times a part of access services, refer-

ence, and a stand-alone unit. The frequent departmental shifts have caused many disruptions over the years. They also stripped ILL of several important functions and resulted in fewer staff.

In 2009, ILL was moved into what is now often known as technical services, and since that time it has been housed within the closed cataloging and acquisitions area. Interactions between patrons using and requesting ILL services had to be transferred via circulation and reference. Frequently, I would find myself responding to frustrated students, who were unsure whom to talk to, and addressing problems that could have been avoided, had ILL been more accessible.

STARTING A MINI-REVOLUTION

In October 2012, I proposed creating an interlibrary loan public service desk on the main floor of Eastern Washington University's JFK library. The library had just reorganized several floors in the building and unveiled several new initiatives, making it the ideal time for innovation.

My idea was to place an ILL service desk in a prominent positions at the mail service level to provide direct interlibrary loan customer service for our students, faculty, and staff (in addition to e-mail and phone support), with an ILL staff member present at least two hours per day. This would allow patrons to ask questions and receive ILL support in person. Other benefits would include more collaboration between interlibrary loan, circulation, and reference, and direct support for a recent, innovative ILL e-book pilot.

Importantly, I met with many stakeholders in the library, including administration, department heads, IT staff, and those on the desks on a daily basis. To prove how valuable a service ILL is and to demonstrate how important it is to have a public face, I gathered

Seven (Serious) Networking Tips from The Machiavellian Librarian

By André Nault

Success as a librarian depends largely on the work relationships one forms, both with colleagues and the people being served. Raising your visibility and developing a reputation as a strategic ally happens from one-on-one meetings. But you can have a broader impact by demonstrating your willingness to perform non-traditional work or being receptive to taking on emerging roles. Here are some examples of things I have done.

Weasel into all the department meetings you can. I'm always ready to articulate that "the more I know about the work going on in the departments/schools, the better I can support you." When an issue is raised where I think the libraries can assist, I vocalize the idea.

Instead of attending library association conferences, start attending those of your stakeholders. I was the first librarian to attend the annual conference of the American Association of Veterinary Medical Colleges. Try to give talks or present posters at those conferences.

Try to co-author posters, presentations, and papers with faculty. I've had success by inviting them to contribute to some of my research to offer the "faculty perspective," and schools encourage such outside collaborations. Whenever possible, I publish articles in the journals read by faculty, not by the library community.

Look for local professional groups that could be strategic allies. I joined the Continuing Education Committee for my state's veterinary medical association to integrate myself further into my outreach community.

Consider taking part in the social events of your stakeholders. I attend events orchestrated by the school I support as a liaison—welcoming students and attending commencement activities, happy hours, and research celebrations—any event where I can increase my visibility and have an opportunity to network.

Set up networking events for new faculty. The University of Minnesota has a fund designed to pay for lunches with new faculty, so consider setting up something similar at your institution!

Finally, consider pursuing an adjunct appointment within the school you support the most. This single achievement significantly changed how I was viewed by faculty. The advantage librarians have is that they are already salaried by the institution. Thus, the appointment typically does not involve an increase cost for the school.

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statistics on the amount of requests we received annually and outlined the profiles of some of our biggest ILL users.

Graduate students and faculty make up the majority of our ILL transactions, and many of those requests are for obscure and hard-to-obtain items. Creating a space that is accessible for these requesters allows the library to provide greater public service and strengthen our relationships with faculty and future benefactors. Together, we determined that having a small mobile desk would allow us to try out different locations in the library for maximum visibility and accessibility.

WORKING TOGETHER FOR THE COMMON GOOD

So what advantages does an integrated ILL really offer? Despite being most often housed in technical services, the closest skill set to ILL is reference. Examples of the types of service both departments field are:

- Requests for information,
- Locating obscure resources,

- Providing on-demand user education, and
- Performing complex searches and support for remote users.

The only difference between ILL and reference is the location of the information the staff are trying to navigate—reference's domain is the library's four walls, while the ILL's is the entire world. ILL and circulation also share many related skill sets, including checking in and out materials, placing holds, troubleshooting, and general patron services. Aligning ILL with reference or circulation benefits not only the departments involved but also the patrons using those services.

THE PATRON IS ALWAYS RIGHT (EVEN WHEN THE PATRON IS WRONG)

Navigating the sea of the increasingly digital world is trickier than ever, and aligning ILL with other teams is one of the best ways of providing top-notch solutions and streamlined progresses. Rather than hunting just to find the right person to ask,

patrons have access to a one-stop shop for the widest possible scope of print materials, e-resources, and other information—no matter where its origin.

In their article, "Ending the Turf War: Circulation, Reference, and Instruction on One Team," Johnson, Jennings, and Hisle perfectly outlined some other advantages to merging different departments; these include:

- Anticipating the needs of patrons,
- Letting go of control and focusing on patron needs,
- Changing in order to stay relevant and essential, and
- Removing barriers.

A direct connection to patrons is invaluable. For example, we noticed an unusual spike in dissertation requests from many undergraduate students. A little investigation revealed that they were using the ProQuest database, but had not distinguished between dissertations and the articles they were seeking. Because we had established a

direct connection, we were able to diagnose what was happening and connect them with a reference librarian to help them find better options for their research.

Other examples of improved customer service included the frequent requests for items already held in our collections. In almost all of these examples, the patron had searched within a database such as EBSCO's Academic Search Complete and had not found the full text there. Instead of following the link to find the full text in another database, the patron had simply assumed that it was not available and placed an ILL request. We were now able to discern the issue and provide these patrons with useful information and hands-on help rather than just a cancellation notice.

Another benefit of the new-look ILL was the ability to highlight our pilot e-book program. The e-book pilot offers additional access (including on-demand purchasing) for hard-to-borrow materials, such as newly released titles, bestsellers, and rush requests. If the ILL request falls into one or more of those criteria and is available as a Kindle book, we offer the patron the option of checking out a Kindle eReader with the book preloaded. The pilot began in early October 2012 and has seen a steady increase in activity, especially in the last two months. Our new desk allows us to promote and market the program as well as offer hands-on support for the students, staff, and faculty using it. Keeping this program at the forefront helps promote not only ILL but the entire learning commons to the university community.

DID IT WORK?

Using the library statistics software program Desk Tracker, we kept a record of the interactions between ILL staff, the patrons, and the circulation and reference staff. This information enabled us to determine not only which times have the highest volume of traffic, but also which types of information are most often requested. These include:

- Information request (reference question),
- Renewal of materials,
- Status of ILL request,
- e-Book query
- Technical assistance, and
- Directional.

The ILL e-book pilot has benefited from the service desk, with more purchases being made in the months since its creation. We now have over 48 Kindle books, and the

***This article was first published in *The Machiavellian Librarian, 1st Edition, Winning Allies, Combating Budget Cuts, and Influencing Stakeholders*, edited by Melissa K. Aho and Erika Bennet. Released 15 May 2014 by Chandos Publishing. Reprinted with the permission of the publisher.**

The book offers real-life examples from librarians who offer first hand examples to help librarians learn to use their influence effectively, for the betterment of their library and their career.

Copies can be purchased by Strategic Library subscribers at a 25 percent discount off to cover price. To purchase, follow this link, http://store.elsevier.com/product.jsp?isbn=9781843347552&utm_source=publicity&utm_medium=excerpt&utm_campaign=StratLibrary, and enter promotion code PBTY14.

service has gained more attention because of increased dialogue between reference, circulation, and ILL. Patrons with e-book questions can now be shown to my desk to have their questions answered and any book requests placed at the point of contact.

On the face of it, having the mobile desk was helpful, because I have indeed moved the ILL desk to a more prominent location with better accessibility and visibility. But, in reality, the fact that the desk is mobile, and quite different from the permanent structures of the reference and circulation desks, makes it appear temporary. I believe a more permanent service desk will be required in the future.

The ILL service desk has been extremely successful in highlighting ILL services and promoting increased interactions between patrons, circulation, and reference. It has also resulted in faster turn-around times for many ILL requests and the handling of ILL queries and problems. I now receive fewer e-mails and phone calls from the circulation and reference service desks because I am assisting patrons directly and face to face. Going forward, we will evaluate this service to see if additional staffing hours are needed and how we can better support the library community. ■

ABOUT THE AUTHOR: Joanne Percy is the interlibrary loan librarian at Eastern Washington University (EWU), and has more than 15 years' experience in corporate, government, and academic libraries. She is piloting an ILL e-book program at Eastern Washington University using Kindles and Nooks. Prior to joining EWU, Joanne worked at a variety of institutions in the Washington, DC, area, including academic libraries at The George Washington University and Georgetown University. She can be reached at jpercy@ewu.edu.

RECOMMENDATIONS:

Secure a Permanent Public Service Location for ILL

- Create an accessible space.
- Increase signage and visibility.

Promote and Expand the Service as Needed

- Train additional ILL staff to provide desk time.
- Market and advertise this new service.
- Collaborate with Reference and Circulation.

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Librarians Can Win

» **Library Card Sign-up Month presents the perfect opportunity to meet with patrons face to face.**

BY JOHN CHRASTKA

In political races, there's a key indicator of voter behavior: has the voter met the candidate or a campaign worker? This personal contact with the candidate or their representative is a more significant driver of likely voter behavior than the policies being espoused by the candidate.

You may never have to run a ballot measure for your library. You may never have to go to the voters directly, but I would argue that you have to behave as if every budget cycle is a referendum on the library. If your library is a municipal department where the city council or a town meeting sets your budget, you have a wonderful opportunity to use the techniques of canvassing to radically improve the visibility of the librarian and the awareness of the library in your community.

Walking and talking makes a difference in political campaigns, regardless of whether the candidate is running for president or is hoping to pass a library referendum. It is necessary and important to behave differently in advocacy outreach than you would in patron outreach. For library funding and advocacy, this personal touch means providing users and non-users alike with a vision about the library's reason to exist and the work that your librarians do every day.

For users, funding may be tied to how the librarians realize the strategic plan for the library. More funding means more collec-

tions, programs, services for different ages and populations, or a better facility to serve the public over time.

For non-users, especially those who may not become users, the reasons the library provide services should be focused on solving community problems first, then appealing to the needs of the person second. For non-users, more funding translates into giving librarians the resources they need for better after-school programs to keep at-risk kids off the street or to help job seekers find new skills or to help some other group of "those people." Your advocates may never come to the library, but they need to understand that librarians are integral to their community. That goal can only be accomplished by introducing



them to their librarians.

The library's staff, friends, trustees, and volunteers have an extraordinary opportunity during September's Library Card Sign-up Month to activate new awareness and support for the library. One way is to model library card sign-ups on voter registration drives.

You can be much more effective by taking a page out of political campaigns and meeting the public door-to-door. And if you are already doing event-based sign-ups at the grocery store, bank, train station, or playground, your success and visibility can be improved by applying these new techniques.

Door-to-door campaigns are extremely effective in

transforming a contact into a conversation and that conversation into action. To shake a person's hand, look him or her in the eye, and introduce yourself as their librarian or library advocate is powerful opportunity to say to someone "I am here as your neighbor. Let me tell you about our library." ■

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» **Walking and talking makes a difference in political campaigns, regardless of whether the candidate is running for president or is hoping to pass a library referendum.**

Filtering and Libraries: Ethical Issues

BY SARAH HOUGHTON

The library profession has an enduring commitment to facilitate an individual's access to information while not monitoring or passing judgment on that information. Privacy, intellectual freedom, and First Amendment rights are long-standing themes in librarian ethics. Why is it, then, when faced with digital information and the ability to prevent access to information on a much larger scale, many librarians have implemented tools that violate those very ethics by implementing Internet filters?

No filter is reliably able to distinguish text or image content—including obscenity, child pornography, or “harmful to minors” material—from other, legal content. Therein lies the ethical challenge facing our profession.

THE WHY AND HOW OF FILTERING

Many school and public libraries in the United States have implemented Internet filters in one form or another, often to qualify for federal funding or comply with a district or state edict that requires libraries to filter Internet access. Some filter only children's access, while others filter all access, including the ability of library staff to access certain sites. Some libraries use simplistic filters that are usually cheaper, while others use complex products that allow a finer level of granular control.

How many librarians, though, have weighed the ethical issues associated with implementing Internet filtering? And how many have created their computer use policies and procedures surrounding set-up and execution of filters

» **Librarians need to assess how Internet filters work and how they influence access to information.**

with these ethics in mind?

Internet filtering is defined as the use of blocking or filtering software or other technology to restrict access to Internet content. The blocking mechanism can vary, but the function is the same—to prevent viewers from accessing, viewing, or hearing specific content. Some filters filter by page content—using a formula of different components such as trigger words, the number of banner ads, images, links, and file types. In my view, this solution is filtering on the fly, since each page is evaluated on the spot by the software and then either allowed or blocked.

The other most common method for filtering is by URL, in which a list of trigger pages (the black list) is created by search-

ing trigger words in a popular search engine (almost always Google) and then blocking the top 10 to 100 results, depending on the software. With this method, a certain amount of local control can be exercised over the filtering software. Most allow implementers to create white lists of permitted URLs or keywords, to allow temporary unblocking (a legal requirement for libraries), and to allow filtering based on subject categories or even specific political views (I'll come back to that later).

One of the major challenges with Internet filtering software is its black box nature. Companies that provide this software claim that the information about how the product works is a trade secret. Therefore, libraries and other clients have no way to determine the algorithms used in determining the blocking, to understand the types of things included in various categories, or to get a complete list of URLs or words that are blocked by the software. As a result, much of the library staff's fine tuning of a filter is guesswork. Librarians can only find out what's on the blacklist by experimentation and can only make educated guesses as to the formulas used for blocking.

WHAT FILTERS DO—OR NOT DO

After studying filters for the past seven years and doing in-depth testing on most of the major products, I am confident in stating that filters do not achieve the goal that many people believe they do. Filters are only about 70 percent to 80 percent accurate in processing text



content. The accuracy rate for images is much lower, closer to 50 percent. And when you start looking at multimedia—such as audio, video, messaging, and social media sites—the accuracy percentage goes down to about 25 percent.

Given that the Children's Internet Protection Act (CIPA) is meant to only limit access to visual content such as images and video, Internet filters—even the best ones—are not achieving that goal. Why would librarians, then, implement a product they know does not work well?

Many libraries choose to filter to be compliant with CIPA and to qualify for federal E-Rate funding, a program that provides discounts to assist some U.S. schools and libraries obtain affordable telecommunications and Internet access. The benefit is often just enough to pay for the filters themselves, however. A few libraries report installing filters in response to staff complaints of a hostile work environment, such as sexually explicit images on patrons' computer screens. Others perceive that the local public or political will is in favor of filtering. Most of those falling into this last category hear the "think of the children" argument from stakeholders, implying that by not filtering Internet access libraries are putting children at risk.

I would argue, however, that by filtering your community's Internet access you are putting your entire community at risk of not being equipped to compete in a modern information economy, where the reality of the Internet is an unfiltered, unfettered, always-changing collection. And, unfortunately, the communities most likely to apply for E-Rate funding and, therefore, to install Internet filters, are those communities most economically disadvantaged and most in need of broad information access and support. As a result, CIPA and libraries have created a second class of Internet citizen by creating a second class of Internet access.

Some libraries have also reported installing filters for fear of being sued (their own fear or that of their library board or city council) for allowing the display of potentially offensive material on library computers. However, and this is an important point, no library has been successfully sued

for not using filters or for under-blocking. All successful lawsuits have been about the library over-blocking constitutionally protected content.

ETHICAL GUIDANCE

The implementation of filters in libraries is strongly guided by the ethics documents of the profession. Let's look at the core librarian ethical statements in the United States. Both the Library Bill of Rights and Code of Ethics from the American Library Association (ALA) speak to ethical issues faced when filtering. Relevant excerpts from the Library Bill of Rights,¹ a document guiding individuals' rights and libraries' responsibilities, follow:

- I. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
- II. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
- III. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
- IV. A person's right to use a library should not be denied or abridged because of origin, age, background, or views.

Items I and II are ethics easily violated with the default settings of most filtering software. Most of the cheaper, less granular software blocks topics approached from a particular viewpoint, such as blocking websites addressing birth control but allowing pro-abstinence-only websites. Because of the black box factor, however, it's impossible to know what's being blocked without trial and error.

Most of the more expensive software offers the ability to block whole swaths of content based on political viewpoint. Libraries can block undisclosed lists of pro and con websites on topics varying from gun control to abortion. Some software also offers the option to only allow sites of one particular religious background while blocking all others.

Whether a library uses these settings or not, it is highly probable that in the creation of the black lists and formula for blocking, the software company's employees made some value judgments that result in the

blocking of material because of the origin, background, or views of those contributing to its creation. And by blocking that material, the library has removed access to it—a direct violation of the referenced sections of the Library Bill of Rights.

Using filters in libraries also violates Item III—that libraries should challenge censorship. If the library has allowed a tool that prevents access to content, then the library, as an organization, isn't challenging censorship.

Lastly, Item IV directly addresses the ideal that the use of a library or access to information should not be affected by a patron's age. The filtering of Internet access based on age (such as filtering in the children's room only or filtering by patron age category) most certainly lessens access.

Similarly, the ALA Code of Ethics,² a document guiding member librarians' professional responsibilities, has much to say that is relevant to a filtering discussion:

- I. We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access...
- II. We uphold the principles of intellectual freedom and resist all efforts to censor library resources.
- VII. We distinguish between our personal convictions and professional duties...

Item I addresses issues of equity in access to library services and materials. By filtering computers in the children's area only, the library eliminates equitable access to online information. The outcome of CIPA, especially in economically disadvantaged communities that do implement filters, results in a lack of equitable access across communities.

Item II calls upon librarians to resist efforts to censor library resources. Does online information qualify as "library resources?" I would argue that it does. Additionally, most filtering tools also filter access to a library's subscription online resources such as magazine and journal databases and e-books, basically anything accessed through a web browser. Those items definitely qualify as "library resources." Again, if a

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library uses Internet filters, that's censorship. I call on all librarians working in libraries with filters to adhere to this element of our Code of Ethics and challenge the use of filters in your library.

Finally, item VII instructs librarians to leave their personal convictions at the door and uphold our professional duties while at work. As such, even if you personally find some of the constitutionally protected content user's access online to be objectionable, you cannot impose your own personal belief system on the operations of your library.

FILTERING MINEFIELDS

I believe there are additional ethical dangers to a library when it implements Internet filters. First, by using filters the library abandons Internet "collection development" to artificial intelligence (AI) and (if you're lucky) minimum wage spot-checkers at the software company. Installing a filter is like entrusting the entirety of your online collection development to a single proprietary black box AI that uses private rating schemes. I do not believe that result is something any librarian would be comfortable with for any other material type.

There is sufficient legal precedent to show that libraries cannot legally adopt or enforce private rating schemes, which is what Internet filtering software uses. The ALA states that "when libraries restrict access based on content ratings developed and applied by a filtering vendor, sometimes with no knowledge of how these ratings are

applied or what sites have been restricted, they are delegating their public responsibility to a private agency."³

Second, by using filters the library agrees to act *in loco parentis*, something libraries have striven to avoid for a long time. Library staff becomes the adjudicators of what is acceptable per community norms. Parents and guardians are responsible for guiding the learning and recreational activities of their children, not the library. When the library puts filters in place, many parents falsely believe that there is no chance their child will see anything they might find offensive on the library's computers. That false sense of security is a dangerous expectation to set with your community's families.

UNFETTERED, UNFILTERED

Libraries supported by public funding are subject to the First Amendment, which forbids libraries from censoring or restricting information based on content or viewpoint. The ALA Library Bill of Rights and Code of Ethics both offer ample guidelines for whether filters are acceptable in libraries. I believe the answer is an unequivocal no.

Filtering software unquestionably blocks information protected by the First Amendment. Legal information is blocked, inevitably, putting libraries at legal risk for over-blocking. Providing access to information, a library's primary goal, cannot be accomplished through Draconian governmental regulations, requiring libraries to restrict access. Librarians, parents, and thoughtful

individuals everywhere in our communities should work together to find ways to educate, prepare, and support all of our community members as digital citizens. ■

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FOOTNOTES:

¹American Library Association, Library Bill of Rights, adopted June 19, 1939; amended Oct. 14, 1944; June 18, 1948; Feb. 2, 1961; June 27, 1967; and Jan. 23, 1980; inclusion of "age" reaffirmed January 23, 1996. <http://www.ala.org/advocacy/intfree-dom/librarybill>.

²American Library Association, Code of Ethics of the American Library Association, adopted at the 1939 Midwinter Meeting by the ALA Council; amended June 30, 1981; June 28, 1995; and January 22, 2008. <http://www.ala.org/advocacy/proethics/codeofethics/codeethics>.

³American Library Association, Guidelines and Considerations for Developing a Public Library Internet Use Policy, rev. Nov. 2000, <https://www.ala.org/Template.cfm?Section=otherpolicies&Template=/ContentManagement/ContentDisplay.cfm&ContentID=13098>.

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