

**Continuing Education for Library and Information Professionals:  
A Practical Approach**

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**Abstract**

In the United States, there is no national requirement for continuing education for librarians. Yet educators and practitioners agree the need is critical as library resources and services must mirror the ever-changing information needs of the community. A variety of approaches are utilized, attempted and suggested ranging from in-house to web-based distance learning. There are advantages to each of these approaches, and disadvantages which mostly revolve around costs. The subject of this paper is a description and discussion of the development of a continuing education course that can be offered to public librarians within the range of approaches. The following will be addressed: 1) the need for this particular course (marketing research) by practicing public librarians; 2) what library and information professionals need to conduct marketing research; 3) the process of developing and delivering the course; 4) a description of the course; and 5) discussion of the utility of web-based courses to meet future continuing education needs of library professionals.

**Introduction**

In the United States, there is no national requirement for continuing education for librarians. Yet educators and practitioners agree the need is critical as library resources and

services must mirror the ever-changing information needs of the community. A variety of approaches are utilized, attempted and suggested including:

- 1) in-house training conducted by in-house staff;
- 2) regionally provided training requiring little travel and expense;
- 3) training offered by professional organizations during conferences or professional meetings;
- 4) university based courses which require travel for those not living locally; and
- 5) more recently, web-based distance learning courses.

There are advantages to each of these approaches, and disadvantages which mostly revolve around costs. Number one, in-house training, while inexpensive, requires in-house expertise, which may or may not be available. Numbers two through four may offer convenience and opportunity but also have associated costs of time and funding. While most agree the library should pay for an employee's continuing education, many libraries, especially public libraries, do not have funds for needed materials and services, much less for continuing education. This is true in part because over half of the United States estimated 16,000 public library outlets reside in rural areas with fewer local government funds to draw upon for daily operations.

Number five, web-based distance learning courses appear more advantageous, as most libraries in the US have computers for in-library use by users, and which can serve a dual purpose to facilitate this approach to learning. This approach eliminates costs associated with travel and time. Finally, no course of study can or should eliminate the cost of personal time necessary for learning. But in light of the constraints of time and funding that many librarians face, courses should be offered in the most efficient and cost effective manner possible.

The subject of this paper is a description and discussion of the development of a continuing education course for public librarians. The following will be addressed: 1) the need for this particular course (marketing research) by practicing public librarians; 2) what data library and information professionals need to conduct marketing research; 3) the process of developing and delivering the course; 4) a description of the course; and 5) discussion of the utility of web-based courses to meet future continuing education needs of library professionals.

## **1. Need for the Course, Or Why Marketing Research for Librarians?**

While there is no national requirement for continuing education for public librarians--there is also no legal mandate for provision of public library service in America. The two may be related inherently, because with no legal basis for public libraries--the demand is weakened for formal standards, accreditation, and certification such as legally mandated schools require for teachers.

To further explain, the first public library was opened at the 'desire of the citizenry.' in Boston, Massachusetts, in March of 1848. Currently, American public libraries are internally mandated by professional associations to provide citizens equitable access to materials and services based upon community analysis. Yet laws exist mandating other public services such as, public school and fire and police protection, which annually compete with the public library for local tax dollars. This competition is critical as an estimated 82% of public libraries' budgets are drawn from local tax dollars. Because of the legal mandate for such agencies as schools, fire and police-- bureaucratic support is greater--employing specified personnel to conduct data gathering and analysis on a systematic basis for planning purposes and solving agency problems. This planned and purposeful acquisition and analysis of data to identify customer wants and needs in order to optimize the product offering is the primary activity of **market research**.

Public librarians conduct less marketing research than their public, and private sector competitors (i.e. other public agencies, video and bookstores), primarily due to lack of trained staff support, limited budgets, research expertise, and relative newness in the marketing<sup>1</sup> field. In today's era of tightening library budgets based upon competition for fewer local dollars, it is more important than ever for public libraries and other public sector agencies to identify changing population characteristics and needs, in order to provide the most desired and effective services and materials. Examples of other successful public sector agencies that recently conducted successful marketing research, to identify competitors and better address the unique needs of their markets, include the American Red Cross, YMCA, and the U.S. Postal Service. Each realized that in the 1990s there was competition for blood donation, racquetball and tennis, and mail service, respectively. Each sought to provide more effective and efficient materials and service by adopting marketing research practices.

Therefore, just as these other public sector agencies successfully employ marketing practices, so must public libraries. It is critical to communicate to public librarians what systematic marketing research can do, and how market research is conducted most effectively. While marketing may be taught as part of a management course, or sporadically as an elective in graduate school, there is no marketing research course taught to library and information students in the US. Therefore, teaching marketing research principles and practices is best facilitated by offering continuing education to professional practitioners. Further, learned and applied marketing research practices, facilitated by emerging technologies allow the public library to meet its self-mandated mission and goals to make needed and desired information and materials

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<sup>1</sup> Marketing is a systematic approach of planning, techniques and concepts that includes gathering and analyzing data to identify the needs of consumers (library users) and improve products, services and communication to effectively meet the user's needs and desires.

equitably available and accessible to the largest portion of the community served. This is the only way for the library to effectively compete for public dollars.

## **2) What do Public Librarians Need to Conduct Marketing Research? Answer: Data**

### **a. Geographic Data Describing the Boundaries of the Market Area**

Identification and mapping of the boundaries of the library's geographic service area are the first step in successfully meeting the mandate of provision of services and materials based upon community needs and desires. Identification of these boundaries is difficult, because ideally the area should be the area from which the library draws most of its users. Historically, public library managers have not had the, available methodologies or technology to survey and establish user residence. In lieu of this, current methods include assigning branches certain census tracts; using existing local government planning zones, or designating a simple radius as the boundaries of the library's service area. The problem, of course, with these approaches are one, people may cross census tract or zone lines and use whichever library they choose (and they do); and two, a rather weak assumption is being made that the majority of users live within the designated radii (this might only be true on small circular island.)

Accurate measurement must become a priority for library managers to assure use of the library is optimized in communities throughout America. New technologies are available for precise market definition and analysis. Geographic information system software (GIS) is the primary tool. GIS can best be defined as a computer system that maintains databases much like other computer systems except the databases include geographic references such as address, latitude and longitude, census tract, or voting district, or a unique library drawn service area. It is possible to examine, for example, which library is nearest to another library, which transit line is close to a new or proposed library site, which addresses of users lie outside the designated library service area, and the demographics of the geographic service area.

GIS currently performs market identification and profiling for retailers. Indeed, business use of GIS for market analysis and site location is now the fastest growing area of GIS usage. There is now even a popular business magazine devoted to the use of GIS for business use called *Business Geographics*. Library managers with proper training may also utilize this tool. Even if the library can not own GIS, the library and information professional may understand what questions may be successfully asked. Most county government planning departments utilize GIS for some applications, thus making GIS accessible to the majority of public library managers as well.

### **b. Demographic Data Describing Users**

Once the geographic market area is defined, a description of the people within the geographic area can be made. The most important library-related data to be collected for analysis is a demographic description of the people in the service area. Demographics relevant to public library use include: number of households, income, age, family status, ethnicity or race, and education levels.<sup>2</sup> Other important factors include topographical and cultural barriers to library use, proximity to transportation and schools, distance from other libraries, competitors, etc. This market data is external to the library.

### **Identification of Changes More Important than Ever**

Communities and neighborhoods across America are increasingly changing from traditional to more multi-culturally diverse library markets. The majority of states report double-digit percentage increases in minority populations. Hispanic communities are as easily in the majority in parts of Ohio and Massachusetts, as in the border states. Provision of 'opening day' collections and services was more successful when America was reasonably homogeneous. By and large, public libraries provided similar services and materials often with a feeling of what the public--should have.

In today's increasingly heterogeneous and technologic society, dynamic and ongoing community analysis is crucial to provision of library services and materials that meet complex needs in-ever-changing communities. Also research indicates that for certain groups such as the elderly, juveniles, lower income or minority or immigrant groups--libraries must be placed within 'stumbling distance,' in order for these groups to have an opportunity to develop the library or reading habit. The reasons for this include transportation limitations for the elderly and juveniles, and cultural barriers for the latter groups who may not desire to travel outside the neighborhood for a myriad of services. GIS technology can identify demographic changes enabling the library manager to make optimum decisions regarding collection and service development, absolute location, closure, or opening of library facilities that best suit each community.

### **c. Internal Public Library Data: Current Status, Current Needs**

Parallel to data collection and analysis of the public library's external environment and development of services and materials based upon this analysis, the library manager is faced with collecting and analyzing type and level of use inside the library. This of course, is compared to a retailer identifying and tallying point of sale (POS), data to understand what products are desired and needed.

The oldest and most basic internal data used by library managers resides in internal reports. Most organizations accumulate this information on a regular basis during the course of a

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<sup>2</sup> Christine Koontz, Library Facility Siting and Location Handbook, Greenwood Press: Connecticut, 1997.

workday. Library inputs derived from these internal reports are primarily number of books circulated, quantities of types of materials, number of staff, and square footage. Traditionally these were the only counts used to assess a library's success. It was only in the early eighties that the library profession developed and implemented the concept of 'output measures' --which rather than simply describing what is in the library, measure the library's performance to people outside the library (the public, local government, state library.)

These output measures frequently include per capita measures of not only circulation, but also reference transactions, document delivery, visits, in-library use, and registrations.

### **The Importance of Counting all Internal Library Use**

Whenever certain library uses are difficult to count, library systems often omit these statistics in the use report, and rely solely on circulation. Indeed, library funding within a library system may often be allocated based solely upon circulation levels. Therefore, a library with high circulation would be less likely to have funding cut by the funding agency, by omitting these other counts. Libraries that have low circulation, but higher use, such as in-library materials use, but that do not count this use because of the difficulty of doing so run the risk of appearing poorly used--and having funding cut. Research indicates that libraries in lower income and minority markets often have lower counts of circulation and higher counts in other use categories, making them especially vulnerable to funding cuts and closure when all real use is not counted.

Just as McDonald's would not consider counting only the hamburgers that are sold at the drive-through window (eliminating those consumed in the restaurant from its total sales) neither can a public library afford to count only books that circulate (eliminating materials used in the library, librarian assistance in resume writing and science projects, use of copy machines and computers, etc.).

A nationwide research project facilitated measurement of difficult to count library use with new methodologies and technology.<sup>3</sup> Existing output measures and new measures were designed to capture a large percentage of all types of uses, providing an unprecedented level of detailed information regarding library use beyond circulation, in over 170 library branch market areas across the country. A new technology to the library field, personal data collection terminals (PDCs) and or Palms can be used to collect data by offering libraries the opportunity to scan in-library use data more efficiently.

### **3. The Process of Developing and Delivering the Course**

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<sup>3</sup> "Market-Based Adult Lifelong Learning Performance Measures for Public Libraries Serving Lower Income and Majority Minority Markets," sponsored by U.S. Department of Education. Principal Investigators, Dr. Christine Koontz and Dean K. Jue, Florida State University, Tallahassee, Florida (September 1997-February 1999.)

The course was developed to maximize the adaptability of the course content to situations found in diverse library environments. This was accomplished by conducting research and educational course development in conjunction with a diverse group of real-world librarians. Those librarians were drawn from library systems that range the gamut from rural to urban environments, from traditional upper-middle-class, to multi cultural and poor neighborhoods.<sup>4</sup> Thus, the probability that the course would successfully meet the needs of a variety of library environments was increased.

In addition, tightly integrated into the project design was regular evaluation of the usability and usefulness of the materials for practicing librarians. Experts in assessing product usability and usefulness performed evaluations, through in-class assessment and viewing of videotapes. Participants also filled out evaluations after each class. The course was continually refined and rearranged based upon feedback.

#### **4. A Description of the Course**

This marketing research continuing education course includes: 1) relevant resource materials; 2) methodologies for systematic data collection and analysis; 3) exercises; 4) training for two emerging technologies that facilitate systematic data collection and analysis; and 5) real-life case studies. The course creates an awareness of GIS applications that facilitate market determination and analysis, and in using the Palm Pilot to collect in-library use. Replicable materials and training will be available through the GeoLib program web site at Florida State University ([www.geolib.org](http://www.geolib.org)), for access at no charge.

At present the course is divided into four sections described below.

**Section 1: Marketing Research** - In this section marketing research is introduced as to its functionality within a four step marketing model (Marketing Research, Market Segmentation, Marketing Mix and Marketing Evaluation.<sup>5</sup>) Marketing reserach is introduced through a six stage process including: 1) identify purpose of research; 2) develop a plan; 3) prepare and collect data; 4) process the data; 5) prepare a research report; and 6) identify the problems encountered. Four in-class exercises are conducted to faciltate understanding of the principles and activities.

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<sup>4</sup>The course was taught in Bainbridge, GA, Wichita, KS, Charlotte, NC, Jamaica, NY and at two pre- conferences. While the course was developed for public librarians, the principles and practices of marketing research are applicable to all types of libraries as evidenced by the course being taught successfully to special librarians.

<sup>5</sup>Marketing research is the process of identifying the problem, developing a plan to collect and analyze the data needed, and communicating the results; market segmentation is grouping users (customers) so products and services can be delivered efficiently and effectively; marketing mix is the development of product, price, place and promotion of materials, services and programs to serve various segments; reviews the marketing effort.

**Section 2: GIS (Geographic Information System Software)** - This section introduces GIS through application to real-world problems, library marketing purposes, and a summary of basic commands and exercises. When computer were available to participants, hands on exercises were conducted. Otherwise GIS was demonstrated by the instructors.

**Section 3: Sample Case Study** - Real-life application of the six stages is illustrated in a public library market case studies including branch closure, merger and relocation. GIS is utilized to conduct the analysis and process the data. The case study is intended to bring all components of the course together in one application.

**Section 4: Appendices** - Valuable secondary data sources are included, as well as a marketing research bibliography, webography of library statistics, and a glossary of marketing definitions. This section can be easily updated as changes occur.

## **5) The Utility of Web-Based Courses to Meet Future Continuing Education Needs of Library and Information Professionals.**

Finally, now more than ever, US public librarians are being called to the forefront of the equitable information access 'war.' Federal money currently available and earmarked for public libraries as well as private donations (e.g., Gates Library Foundation) for provision of this equitable access necessitates that public librarians be well-trained and up-to-date in the most effective and efficient management and marketing techniques utilizing the most effective technologies. Why not utilize the latest technologies to accomplish the continuing education of public librarians?

As more and more libraries of all types are wired to the Internet to better serve citizens bridging the digital divide between those who have access to technology and those who do not, so should library and information educators investigate the Web as an alternative for provision of continuing education. It is fast, cost effective, convenient and valuable--much like library resources provided to library users.