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Essentials of a Public Library Marketing Plan

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Abstract

When public libraries are faced with budget constraints and cuts, it is critical that they learn how to develop comprehensive marketing plans. This is needed because limited public coffers make it vital for public libraries to demonstrate their inherent value to the community and ultimately gain access to sustainable funding sources. Additionally, public libraries are most utilized when the economy is not thriving and provide immeasurable benefits to patrons looking for work, gaining job skills, and needing access to computers and the Internet. This paper reviews elements of a number of public library marketing plans. Through this review, eight basic components of an effective marketing plan for public libraries are identified in an effort to provide a blueprint for those interested in developing public library marketing plans.

Introduction

A prolonged state of poor economic performance in the United States has placed public libraries in a precarious situation. The poor economy has strained public coffers and library funding, while at the same time producing a surge in patron visits and usage of services such as free public access to computers and the Internet (Kavner, 2011). Despite this rising demand, budget cuts at the state and local levels have led to an unprecedented reduction in public libraries' services, hours and an increasing rate of library closures across the country (American Library Association, 2011). Facing stiff competition for limited public funding and resources in a downturned economy, public libraries are finding it imperative to learn how to effectively market themselves to survive and demonstrate their strategic and economic value to the community.

The creation and subsequent implementation of a comprehensive marketing plan for the public library are critical to coordinating these efforts in order to raise awareness of a public library's value and importance to the local community and funding agencies. A public library's marketing plan provides a useful framework for the logical and effective development and aligned organization of market activities designed to allow a public library to utilize its available resources judiciously (Duke & Tucker, 2007). This paper presents three marketing plan models and synthesizes their main elements into a list of eight critical elements of a comprehensive marketing plan for a public library. These eight critical elements – executive summary, mission statement and role statement, marketing audit, marketing strategy, marketing goals, objectives and action strategies, budget, timeline and evaluation are explained in detail. The paper concludes by arguing for the importance of developing a marketing strategy for 21st century public libraries.

Literature Review

Traditional marketing has generally involved the four Ps: Product/Service, Place, Price and Promotion. Over the years, a variety of other marketing models have emerged including Lauterborn's Four Cs, Shimizu's Four Cs and the Seven Cs Compass Model (Marketing mix, 2013). In these traditional marketing models, a marketing department or individual is generally tasked with creating and disseminating the message. However, with the emergence of Web 2.0 and its accompanying technologies, the pyramid-of-influence is altered: peer-to-peer communications and interactions take

precedence over top-down approaches (Fichter, 2007). Social media and networking technologies play an increasingly vital role in marketing efforts.

Regardless of the model or industry, marketing is about identifying and meeting the needs of your stakeholders. Stueart and Moran (2007) describe marketing in the library context as "...the process of identifying the wants and needs of the population of library and information center customers and identifying the capabilities of the organization to address those needs and then developing or adjusting services and products to satisfy various targeted segments of that market" (p. 119). In its simplest form, the library establishes its value and benefit to the community and in return, receives a benefit--the necessary funding to survive and thrive. A marketing plan is a roadmap or blueprint that provides a structure, format and organization of aligned activities fashioned for the public library in a manner to help it meet its funding needs and support from its target population, the community-at-large.

In the last 10-15 years, recognition of the challenges faced by libraries of all types have prompted a number of library organizations to focus on advocacy strategies, and step-up efforts to increase the availability of and access to relevant marketing resources for libraries. For example, the American Library Association (ALA) has developed and launched a spirited and extensive "@your library" campaign to increase Americans' commitment and valuing of libraries and librarians (American Library Association, n.d.). In 2004, the Public Library Association followed suit and launched "The Smartest Card" campaign to promote the value of public libraries (American Library Association) to the local communities. Over the last decade, these campaigns have spawned the development and dissemination of a rich mixture of resources, press materials and toolkits to assist all types of libraries in enhancing and supporting their marketing activities. Still, many public libraries are just beginning to develop marketing plans and strategies. A recent survey of more than 400 public libraries in the U.S. found that only 20 percent of public libraries have a marketing plan, and just 11 percent have one that is up-to-date (Dowd, 2013).

The Impact of the Internet on Marketing Approaches

The advent of the Internet has offered new cost-effective and wide-reaching marketing opportunities for public libraries. Social media and networking tools, such as Facebook, Twitter, Google+, YouTube, Pinterest, and Tumblr expand the public libraries' ability for outreach, provide a new space to have value, and offer an inexpensive way of meeting typical public library goals of creating community, building brand awareness and increasing traffic (Dankowski, 2013). There have been numerous examples of public libraries which have successfully leveraged these opportunities. For examples, in 2012, the New York Public Library used social media to increase monthly library card sign-ups by 35 percent; and to help address budget cuts, in 2010 the Charlotte Mecklenburg Library in North Carolina raised \$400,000 through social media. Knowing the audience you are attempting to engage as well as the specific purpose of your efforts ultimately drives your choice of which technologies to use and when to post messages (Kaser, 2013). The nature of the Internet and access to these social media and networking tools creates an opportunity for "agile marketing", which can be defined as a process which is "iterative, allowing for short marketing experiments, frequent feedback, and the ability to react to changing marketing conditions" (Ewel, 2013). In a public library setting, agile marketing is particularly useful because of: the speed of query and response; the ability to get instant feedback and experiment with ideas on a smaller scale; the economic benefits of employing low-cost web-based marketing options; and the opportunistic approach to evaluating and analyzing trends and responding to real-time events (McClarey, 2013).

Of course, regardless of the communication channels used to market a public library, the development and implementation of a solid marketing plan are an essential first step. The next section provides a brief overview of three different marketing plan models and a synthesis of their commonalities in an effort to provide public librarians, policy makers, community members and other stakeholders a roadmap for developing their own marketing plan.

Marketing Plan Models

A review of the literature on marketing plans in libraries reveals varying approaches and differing marketing plan elements. For example, presented below is an outline of the main components of three marketing plan models proposed by Duke and Tucker (2007), Fisher and Pride (2005), and De Sáez (2002), respectively.

Marketing Plan Elements from Duke and Tucker (2007)

- Target Audience
- Library Marketing Team
- Marketing Activities
- Assessment of the Marketing Activities
- Budget

Marketing Plan Elements from Fisher and Pride (2005)

- Executive Summary
- Introduction
- Target Market Description
- Customer Market Situation
- Opportunity and Issue Analysis
- Marketing Goals and Objectives
- Marketing Strategies
- Marketing Tactics/Action Plan
- Implementation and Controls
- Summary

Marketing Plan Elements from De Sáez (2002)

- Executive Summary
- Brief Mission Statement
- Macro-Environment Analysis
- Market Audit, SWOT Analysis
- Portfolio Analysis
- Specific Objectives
- Market Analysis – Segmentation
- Proposed Market Strategies
- Marketing Mixes Recommended
- Evaluation Methods
- Timetable
- Budget

The structure of these plans is somewhat similar, although the level of detail and comprehensiveness vary. For example, the number of elements in these marketing plans ranges from six in the Duke and Tucker model to twelve in the De Sáez model. An online search and subsequent examination of public libraries' marketing plans further demonstrate that variation exists among the elements of marketing plans for libraries which suggest there is no "one-size-fits-all" or standardized marketing plan. Ultimately, regardless of the particular marketing plan model chosen, it is the contextualization, application and language of the public library's marketing plan to the unique community needs and challenges which determine its utility and value (Siess, 2003).

Marketing Plan Elements

Despite the differences apparent in Duke and Tucker (2007), Fisher and Pride (2005), and De Sáez (2002), there are important similarities suggesting that there are necessary and consistent elements to consider when developing a comprehensive marketing plan for a public library. Accordingly, the eight main elements of a comprehensive marketing plan should include:

- Executive Summary
- Mission Statement and Role Statement
- Marketing Audit
- Marketing Strategy
- Marketing Goals, Objectives and Action Strategies
- Budget
- Timeline
- Evaluation

The specific elements included in a marketing plan for a specific public library may vary depending on the library's unique needs, available resources and context within the larger community. But generally

speaking, these eight elements would be applicable and relevant for inclusion in most public library's marketing plans.

Purpose and Content of each Marketing Plan Element

This section describes the purpose and content of each of these eight elements.

Executive Summary:

The purpose of the executive summary is to provide a succinct synopsis of the marketing plan. In addition, this section presents the current situation of the public library within the larger community context, and identifies any trends which may influence the library's resources and services (De Sáez, 2002). Since the content for the executive summary is derived from the completed plan, this section is written last. However, this section of the marketing plan is found at the very beginning, and thus presents the first opportunity to engage the audience. Consequently, the writing and specific language should consider the target audience, be engaging, compelling and provide readers a concise summary of the marketing plan enticing them to want to learn further details and offer support.

Mission Statement and Role Statement:

The mission statement "sets the stage" for the marketing plan. It offers the audience information about the public library's background and context within the community including its value and unique contributions. It also describes the library's philosophy, and values.

In addition, this statement should reflect community patterns and needs. A well written mission statement serves as the foundation for subsequent goals and objectives. While the mission statement describes the "why", the role statement translates this into a more concrete and action-oriented "what" defining how the public library expects to function within the planning period to serve the community needs. The mission statement and role statement are interdependent; they are necessarily tightly aligned and consequently, one must be written with the other in mind. However, before these statements can be effectively written, the marketing audit must be conducted in order to understand the potential role of the library in the community and consider its assessed strengths and weaknesses within the particular context.

Marketing Audit:

The marketing audit is considered a fundamental and integral part of the marketing planning process. The marketing audit is also known as the situational or marketing analysis (How to Write, 2011). In the case of the public library, it is a complete assessment and analysis of the library's internal and external environments as well as macro and micro environments. To assist in these analyses, typically two forms of environmental scanning are employed: the PEST; the Political, Economic, Social and Cultural, and Technological analysis, and SWOT; the Strengths, Weaknesses, Opportunities and Threats analysis (De Sáez, 2002). These analyses are structured to illuminate the influential factors, internal and external, and macro and micro, which may have an immediate or future impact on the public library's operations, services, resources and the strategic direction. The intent is to understand this context, its implications, and prepare the public library accordingly. Once these analyses are completed, this information is then used to help inform the development of the mission statement and role statement for the public library.

Marketing Strategy:

The information which emerges in the marketing audit will determine the most appropriate marketing strategies to select for the public library's marketing plan. These strategies will shape the direction of the marketing plan. Content for this section may include positioning statements, pricing, promotion, distribution strategies and marketing programs for the public library. The inclusion of specific content is contingent on the relevance to the context of the public library and alignment with its mission statement and role statement (How to Write, 2011). For example, pricing information may not be relevant for inclusion for a public library's marketing plan strategy. The marketing strategy section is necessarily integrated with the marketing goals, objectives and action strategies.

Marketing Goals, Objectives and Action Strategies:

These three areas are necessarily grouped together because of their interdependence. A useful guide to develop the marketing goals is the S.M.A.R.T. goal guidelines (Smart criteria, 2012). S.M.A.R.T. stands for Specific, Measurable, Attainable, Relevant and Timely. A variation of this guideline is the S.M.A.R.T.E.R. guidelines, where the “E” represents “Evaluation” and the “R”, “Reevaluate” (SMART criteria). For the public library marketing plan, the evaluation is a separate element and will also include reevaluation, so consequently the S.M.A.R.T. version of this model (as opposed to the S.M.A.R.T.E.R. version) is selected for this context. The “Specific” in S.M.A.R.T. goals emphasizes the need for specific marketing goals, which can be achieved through addressing “who”, “what”, “why”, “where” and “which”. “The “Measurable” in S.M.A.R.T. goals indicates that the specific marketing goals for the public library’s marketing plan should be concrete enough to be measurable and quantified. This way, it will be possible to measure progress toward the goals. “Attainable” simply means that the goals, although perhaps challenging to achieve, should be within the bounds of attainability considering the available and needed resources and timeframe. Similarly, “Relevant” suggests that the goal should be aligned with the public library’s and community’s mission and philosophy. Lastly, the drive to meet these goals is not open-ended; there is a definite and finite timeline, which is established to reflect a sense of urgency. Setting the timeline takes careful planning and consideration to ensure the goals are not met too soon nor too far off into the future. In addition, a properly set timeline ensures that the necessary funding, resources and commitment are accessible and available throughout the defined period.

The marketing objectives are more narrowly focused than the goals, and are intended to serve as milestones or benchmarks to measure and track progress toward achieving and meeting the identified marketing goals of the public library’s marketing plan. Typically, each marketing goal is supported by a series of objectives. Accordingly, the goals are written first, and then the objectives are penned in a manner to support the goals.

Lastly, the action strategies are developed. This “plan of work” or tasks that embody the action strategies are crafted to meet the marketing objectives. While the marketing goals and objectives of the public library’s marketing plan detail where the public library is going, the action strategies are the vehicle, process and the means to get there. Each specific action or task is defined with appropriate timelines, benchmarks and identification of the individual(s) or unit(s) responsible for leading the efforts for fulfillment of the task.

Budget:

This can be one of the most challenging sections of the public library’s marketing plan to develop because of its scope and dependence on accurate estimations which are needed to calculate total costs. The purpose of the budget section is to assess and project the total funds necessary to adequately deliver and meet the public library’s marketing goals and objectives. This budget section should include indirect and direct financial resources necessary including personnel, materials, services, insurance costs, press, etc., as well as factored inflation rates if there is an extended timeline and the potential of increased costs (Siess, 2003). This section should also identify existing and anticipated sources of the essential funding, the implications of not providing these, the breakdown of specific costs, as well as a spending timeline (De Sáez, 2002). Lastly, framing these costs within the context of the intended outcomes, benefits, value and opportunities to the community, i.e., the return on investment, can help couch this topic in a more optimistic and beneficial light.

Timetable:

A reasonable and relevant timetable for the marketing plan is crucial. Understanding the sequence of different activities within the plan, as well as those that overlap and occur simultaneously is critical to the successful implementation of the public library’s marketing plan. Critical path analysis, project management software package use, and a globally shared calendar can assist in these processes (De Sáez, 2002). It is best to add extra time for activities and situations beyond the public library’s control, such as any legislation that needs to take place or other activities which may involve time delays such as the shipping and delivery of items. Equally important is to take a liberal approach in estimating the amount of time required to complete other tasks and sections of the plan---this allows for flexibility and unanticipated but often necessary changes to the timetable. Ultimately, a well thought out and structured

timetable will ensure that the specifics of the public library's marketing plan can be delivered on-time and on-budget.

Evaluation:

Evaluation is integral to an effective marketing plan. It provides accountability, improves the quality and effectiveness of the plan and helps to better understand the achievements and impact of the plan (National Network of Libraries of Medicine, 2012). Evaluation is essential at every step and consequently should include both formative and summative evaluative techniques (De Sáez, 2002) designed to measure the effectiveness of marketing activities (Duke & Tucker, 2007). The purpose of the evaluation section is to help improve the marketing plan's utility and effectiveness, identify any problems or issues along the way, and integrate appropriate solutions. Accordingly, evaluation should be designed as an integrative activity with the intention of regularly examining the evaluation feedback. The analysis and resulting information from this feedback should be folded back into the marketing plan, and the plan should be adjusted accordingly.

Conclusion

In today's economically challenging times and with limited financial funding to support a variety of competing publicly-funded entities, it is crucial that public libraries understand how to effectively market themselves to their stakeholders and promote their value and importance to the community it serves. A comprehensive marketing plan for the public library is a key to these efforts. This paper described eight critical elements of such a plan, with a focus on the purpose and content of each. With the proper development and implementation of a comprehensive marketing plan based on these eight elements, a public library is one step closer to ensuring its longevity and solidifying its long-term relationship with the community and helping secure ongoing funding sources. 21st century libraries are even more vital and integral to our communities than in years past, and a marketing plan will help a library to build the economic, social and political capital with its stakeholders that is necessary for public libraries to thrive and meet the needs of their constituents in a rapidly changing world.

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