# Library Management Competencies

*A successful library involves leadership and careful management. The management perspective starts at the big picture level, establishing goals and objectives, planning for implementation, determining value, and promoting community and stakeholder relationships.*

## Budget & Funding

While libraries face stagnant or reduced budgets, the demand for library services increases. The ability to prioritize assumes high importance and must be based on solid numbers and processes. Due to the wide variety of funding structures for libraries, these competencies are more general than specific. The budget competencies are interrelated with most other competency areas.

| Competency: Budget & Funding | Understands and employs basic budget and finance concepts and terminology |
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| **Associated Skills and Knowledge** | <ul><li>Understands and utilizes established accounting practices and procedures</li><li>Develops and evaluates the library budget in alignment with short and long range goals and objectives</li><li>Understands and applies federal, state and local financial laws and regulations</li><li>Works with the library board to develop members' understanding of the library finances, including the budget process</li></ul> |
| Competency: Budget & Funding | Establishes effective financial management processes and services, using sound business and financial judgment |
| **Associated Skills and Knowledge** | <ul><li>Monitors economic trends and other fiscal issues for potential impact on the library</li><li>Conducts short-, medium- and long-range fiscal planning</li><li>Conducts financial analysis to identify costs, risks and alternatives, including cost-reduction and value enhancements</li><li>Monitors the progress of contracts for library materials and services</li><li>Promotes and justifies the library's needs to funding authorities</li><li>Assesses needs and develops plans for capital improvement projects</li></ul> |

| Competency: Budget & Funding | Identifies and pursues multiple funding sources for the library |
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| **Associated Skills and Knowledge** | ▪ Identifies sources for grant funding and writes effective grant applications<br>▪ Develops strategies for additional funding sources<br>▪ Works with Library Foundation and Friends of the Library groups to generate private-sector support and to cultivate and solicit private donors |

## Community Relations

Fundamentally, the library directors and leaders have to believe in the value of the library and its services in order to demonstrate its value to the community and form strategic relationships to promote the vitality of the library.

| Competency: Community Relations | Demonstrates the impact and value of the library to the community through ongoing evaluation and assessment of library services |
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| **Associated Skills and Knowledge** | ▪ Employs evidence-based management to demonstrate the value of the library<br>▪ Uses appropriate business and management approaches to communicate the library's value to decision makers<br>▪ Understands data collection, research and analysis methods<br>▪ Identifies sources and tools for gathering the best available data (both quantitative and qualitative), including systems to manage library data and generate reports<br>▪ Performs outcome-based evaluations to measure the effect of the programs and service on various user groups<br>▪ Observes benchmarks and consults with comparable organizations |
| Competency: Community Relations | Builds support for the library, using the most appropriate methods among a variety of groups |
| **Associated Skills and Knowledge** | ▪ Communicates the value of library services, products and policies to library management, library staff, key stakeholders, user groups and the community<br>▪ Leverages community to build support at the local, state and national levels, both for ongoing library services and special one-time campaigns<br>▪ Leverages participation in organizations to promote library initiatives<br>▪ Identifies and enlists strategic partners to obtain support for the library<br>▪ Demonstrates strong communication skills to deliver a clear and coherent message<br>▪ Promotes the library as a center of lifelong learning for the community |

| Competency: Community Relations | Maintains positive public relations through communication and promotion of the library's values, services, accomplishments and needs to all stakeholders |
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| Associated Skills and Knowledge | ▪ Understands the relationship of the library to others within the governmental organization<br><br>▪ Sets policies and practices for clear communication of the library's message to staff, library users, the community, the library board, local and state government, and to funding agencies<br><br>▪ Maintains visibility in the community by joining and networking with organizations that promote libraries and librarianship<br><br>▪ Provides information about library services and products in multiple mediums, including print and electronic (Web), in accordance with the marketing plan<br><br>▪ Enhances the library's message by speaking publicly at library programs and throughout the community<br><br>▪ Develops relationships with media representatives, community leaders and decision makers |
| Competency: Community Relations | Forms strategic partnerships with community organizations |
| Associated Skills and Knowledge | ▪ Identifies potential partners and opportunities and articulates the mutual advantages of partnership<br><br>▪ Develops and leverages collaborative relationships to facilitate the accomplishment of the library's goals<br><br>▪ Provides leadership to build effective relationships and coordinate efforts between internal and external stakeholders<br><br>▪ Sustains partner relationships for future opportunities |

## Facilities

The significance of the library as "place" underscores the importance of atmosphere, usability and safety in the physical environment for your community.

| Competency: Facilities | Creates a welcoming and user-friendly physical environment that encourages all community members to use library services |
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| Associated Skills and Knowledge | ▪ Understands space planning issues, including the application of ADA requirements to the physical space and equipment<br><br>▪ Plans for new or updated facilities to meet current and future community needs<br><br>▪ Understands the impact of the physical elements in the library on user satisfaction and emotional response<br><br>▪ Monitors the use of facilities and makes changes to improve the user's experience |

| Competency: Facilities | Creates and maintains a healthy and safe environment for library personnel and users |
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| Associated Skills and Knowledge | ▪ Understands the scope of building operations and addresses maintenance issues with appropriate inspections and upkeep<br>▪ Addresses safety issues through appropriate maintenance and adequate information provided to staff |

## Laws, Policies & Procedures

Well-written policies and procedures, based on sound legal footings, help all levels of staff to be consistent in their relationships with users, colleagues and other stakeholders.

| Competency: Laws, Policies & Procedures | Understands, applies and explains applicable laws |
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| Associated Skills and Knowledge | ▪ Understands and applies state and federal laws that pertain directly to libraries and to public entities in general<br>▪ Maintains awareness of current policy and legislative initiatives that may impact library services and administration<br>▪ Understands and applies intellectual freedom and civil rights laws<br>▪ Understands and applies copyright and intellectual property laws<br>▪ Understands and applies laws and policies governing confidentiality and rights to privacy<br>▪ Understands and implements the American Disabilities Act (ADA) and state and local regulations where appropriate |
| Competency: Laws, Policies & Procedures | Develops policies and procedures based on the library's mission and user needs to guide efficient and effective library operations |
| Associated Skills and Knowledge | ▪ Develops and updates policies in collaboration with other departments, institutions, regional systems and larger organizations, such as State Libraries<br>▪ Understands liability and legal issues pertaining to policy and procedure development<br>▪ Explains the rationale underlying library laws, policies and procedures and seeks staff and user feedback during policies and procedures development<br>▪ Understands the relationship between library policies and customer service<br>▪ Continuously evaluates the needs for new or revised policies and procedures |

| Competency:<br>Laws, Policies &<br>Procedures | Creates policies and practices to ensure safety and security |
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| **Associated Skills and Knowledge** | <ul><li>Creates and regularly evaluates emergency response policies and procedures and prepares staff to respond appropriately</li><li>Maintains up-to-date policies/procedures for staff communication and crises communication</li><li>Creates and regularly evaluates disaster preparedness and recovery plans for library resources and equipment</li></ul> |

## Marketing

Relying on past reputation and word-of-mouth appreciation from users may not be enough to ensure survival in the face of dwindling tax or government support. Effective marketing can overcome misconceptions, get the community involved and attract new audiences.

| Competency:<br>Marketing | Understands and applies marketing theory and practices |
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| **Associated Skills and Knowledge** | <ul><li>Understands the basic principles of marketing and how they apply to library services</li><li>Conducts periodic review of the community for opportunities to align needs with library services</li><li>Identifies, analyzes and prioritizes target markets and audiences, and determines how best to promote library services that can effectively serve them</li></ul> |
| Competency:<br>Marketing | Develops, implements and evaluates an ongoing marketing plan for the library |
| **Associated Skills and Knowledge** | <ul><li>Sets measurable market goals and objectives, including brand strategy</li><li>Highlights programming objectives that affect the overall marketing of the library</li><li>Develops consistent promotion and distribution strategies to meet the goals and objectives based on the analysis of target audiences</li><li>Creates graphics standards, style guide, and consistent print and electronic visual communication standards</li><li>Provides marketing training (how to talk to media, how to promote services, etc.) for all staff, board members and other key stakeholders</li><li>Implements the marketing efforts, maintaining records and clear communication with staff and stakeholders</li><li>Evaluates the effectiveness of the strategies and revises as necessary</li></ul> |

# Organizational Leadership

While library services involve many roles and staff members, the guidance and driving force originate with the director or manager. Examination of any dynamic and successful library will usually reveal an effective and energetic leader at the top.

| Competency: Organizational Leadership | Uses leadership skills to provide vision and guidance to library staff, board members and the community |
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| **Associated Skills and Knowledge** | <ul><li>Articulates the mission, vision and values of the library organization</li><li>Aligns the library with, and is supportive of, the strategic directions and needs of the community</li><li>Defines and communicates the library's goals and objectives aligned with the library's mission and vision</li><li>Evaluates and revises if necessary the library's mission, vision, value statements and strategic plan</li><li>Understands the social, political and economic context in which the library exists</li><li>Models accountability for quality and timeliness of work and reliability in achieving excellent results</li></ul> |
| **Competency: Organizational Leadership** | **Contributes effective strategies and decisions regarding library services and resources** |
| **Associated Skills and Knowledge** | <ul><li>Understands the library's strengths, weaknesses, opportunities and challenges</li><li>Recommends adopting, modifying or eliminating services, based on the best available evidence</li><li>Prepares for and responds to crises and unanticipated events</li></ul> |
| **Competency: Organizational Leadership** | **Provides effective leadership of all stakeholders and teams** |
| **Associated Skills and Knowledge** | <ul><li>Keeps current with new approaches to team behavior and applies that knowledge to help achieve organizational goals and objectives</li><li>Builds trust relationships with all stakeholders and establishes appropriate procedures to keep informed of and respond to issues</li><li>Delegates decision-making authority and task allocation appropriately to maximize the effectiveness of organizational and individual efforts</li><li>Secures and allocates resources to assure stakeholders' accomplishment of tasks and responsibilities</li><li>Manages meetings and meeting participants effectively and practices consensus-building skills</li></ul> |

| Competency: Organizational Leadership | Applies change management to assure effective implementation of change and acceptance by all stakeholders |
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| **Associated Skills and Knowledge** | ▪ Remains open to new ideas, keeps current on trends and issues, and seeks and sponsors innovations<br><br>▪ Recognizes the benefits of change and understands the principles, processes and responsibilities for managing organizational change<br><br>▪ Involves appropriate parties in planning, implementing and evaluating change<br><br>▪ Prepares staff, Library Board, users and other stakeholders for change through effective communication to raise awareness, build commitment and ensure understanding<br><br>▪ Anticipates change-resistant behavior (fear, conflict, negativity, complacency) and applies strategies to address it |

## Personnel Management

Productive performance by its personnel is the backbone of a successful library. Strategic oversight of the workforce is key to achieving the library's mission and goals.

| Competency: Personnel Management | Contributes to a productive workforce through effective recruitment and selection |
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| **Associated Skills and Knowledge** | ▪ Develops and applies consistent and effective interviewing techniques<br><br>▪ Makes hiring decisions based on sound evaluation methods<br><br>▪ Understands and complies with employment laws and regulations that impact recruiting and hiring<br><br>▪ Understands and complies with library policies and procedures that impact recruiting and hiring<br><br>▪ Values a diverse workforce and recruits for diversity |
| Competency: Personnel Management | Leads and empowers employees to deliver effective, high-quality library service |
| **Associated Skills and Knowledge** | ▪ Fosters and facilitates a collaborative environment based on a shared vision<br><br>▪ Models enthusiasm and commitment and energizes staff to meet defined goals<br><br>▪ Communicates clearly and regularly with staff about library, government or major community changes that may affect them<br><br>▪ Promotes teamwork among staff and promotes team-building practices<br><br>▪ Recognizes staff achievements through formal and informal methods |

| Competency: Personnel Management | Establishes effective strategies for performance management |
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| **Associated Skills and Knowledge** | ▪ Establishes clear performance expectations linked to the library's strategies and priorities, with appropriate levels of quantity and quality of work<br>▪ Enables staff to strive for continuously higher standards of performance<br>▪ Provides appropriate tools, resources and authority to support performance expectations<br>▪ Establishes methods for review and evaluation of performance and holds all staff accountable to meet performance expectations<br>▪ Provides constructive feedback and takes timely and consistent corrective/disciplinary action when appropriate |
| **Competency: Personnel Management** | **Understands and applies legal standards and requirements for performance management** |
| **Associated Skills and Knowledge** | ▪ Understands and complies with employment laws and regulations that impact performance management<br>▪ Understands and ensures compliance with human resources policies and procedures<br>▪ Understands a variety of problem-solving techniques and applies them to dispute resolution |
| **Competency: Personnel Management** | **Works appropriately with consultants and volunteers** |
| **Associated Skills and Knowledge** | ▪ Develops and applies consistent practices for hiring consultants and recruiting volunteers<br>▪ Articulates the need for consultants and/or volunteers and defines clear roles and responsibilities<br>▪ Develops and administers contracts<br>▪ Provides effective training and supervision of volunteers |

## Project Management

The multiplicity of factors involved in managing any library project demands an organized approach. Basic project management skills enable the process for coordinating people, time, money and deliverables.

| Competency: Project Management | Employs sound project management principles and procedures in the planning and implementation of programs and services |
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| Associated Skills and Knowledge | ▪ Understands the basic principles and procedures of project management<br>▪ Defines outcomes and expectations based on user requirements and needs<br>▪ Develops support for projects that implement library goals and objectives<br>▪ Uses resources efficiently and manages effectively within budget limits |
| Competency: Project Management | Leads work teams with clear direction and effective communication |
| Associated Skills and Knowledge | ▪ Conducts strategic selection of team members<br>▪ Develops a work plan with tasks, timeframes, milestones, resources and realistic deadlines<br>▪ Anticipates potential problems, sets controls and contingency plans, and responds effectively to resolve barriers |
| Competency: Project Management | Monitors and evaluates projects and uses the results for project improvement |
| Associated Skills and Knowledge | ▪ Establishes processes for collecting, documenting and reporting data<br>▪ Monitors project progress and evaluates performance to ensure quality and quantity standards are met<br>▪ Fulfills legal or project requirements for compliance, record keeping and reporting<br>▪ Analyzes and identifies dissemination strategies, and reports project data and outcomes to stakeholders |

# Staff Training & Development

Staff development continues to be one of the most important needs in libraries. From the smallest library to the largest, training staff has become critical to meeting the library's mission within the changing landscape.

| Competency: Staff Training | Establish strategies and long-range initiatives to create a learning environment within the library |
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| **Associated Skills and Knowledge** | ▪ Promotes the importance of continuing staff development and provides appropriate opportunities<br>▪ Understands how the learning function for library staff relates to the provision of quality library service<br>▪ Creates a culture that enables both formal and informal learning processes in the workplace<br>▪ Promotes a performance-based culture that aligns learning goals and objectives with desired outcomes<br>▪ Fosters staff growth and opportunity through mentoring |
| **Competency: Staff Training** | **Plans for and supports staff career development opportunities** |
| **Associated Skills and Knowledge** | ▪ Conducts assessment of staff to analyze training needs<br>▪ Correlates training needs with identified internal and external changes that impact the library<br>▪ Utilizes competency-based or other methods for assessing staff skills and supporting career development opportunities<br>▪ Conducts and summarizes a job task analysis<br>▪ Creates development plans for staff to gain necessary competencies (knowledge, skills, abilities, behavior, attitudes) |
| **Competency: Staff Training** | **Develops and implements appropriate training strategies (for continuing education coordinators, staff training supervisors and trainers)** |
| **Associated Skills and Knowledge** | ▪ Understands and applies knowledge of adult learning theory<br>▪ Designs training activities to meet the needs of targeted audiences and to support specific results<br>▪ Develops and implements training solutions that focus on the learner and accommodate different learning styles<br>▪ Understands the variety of instructional methods available, including e-learning and blended learning<br>▪ Understands and applies instructional design concepts<br>▪ Manages the learning environment for optimal participant experience and value |

| Competency: Staff Training | Develops effective methods to evaluate learning initiatives |
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| **Associated Skills and Knowledge** | <ul><li>Determines measures of success for all training strategies</li><li>Employs multiple evaluation techniques</li><li>Develops processes to evaluate transfer of learning to the workplace and achievement of targeted competencies</li><li>Provides time and procedures to review and reinforce learning</li></ul> |

## Strategic Planning

A coherent overall plan that aligns with the library's goals and community needs will help the library provide successful programs and services.

| Competency: Strategic Planning | Designs and implements an ongoing strategic planning process for the library |
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| **Associated Skills and Knowledge** | <ul><li>Develops strategic plans to align with and fulfill organizational goals</li><li>Analyzes and investigates the needs of the community and environment to anticipate and predict changing trends and influences</li><li>Involves stakeholder groups in the planning process and promotes the plan's value to the community</li><li>Creates appropriate mission statement, goals, objectives and activities that reflect analysis of community needs</li><li>Ensures that long-term goals and objectives align with daily decisions and operations</li></ul> |
| **Competency: Strategic Planning** | Performs ongoing evaluation to gauge the success of the strategic plan |
| **Associated Skills and Knowledge** | <ul><li>Develops and applies appropriate methods to continually measure and ensure the quality and value of library services</li><li>Modifies the strategic plan and redesigns processes as needed in response to ongoing analysis of community needs</li><li>Monitors progress of service planning and provides follow-up, educational and accountability measures</li></ul> |

# Trustees & Friends

The Library Board (Trustees) plays a critical role in the governance of the library. Friends of the Library and Library Foundations provide vital support of the library, raising money and solidifying community relations. It is a primary responsibility of the director to enable the operation of these groups.

| Competency: Trustees & Friends | Manages the relationship and communication with the Library Board (Trustees) |
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| **Associated Skills and Knowledge** | ▪ Understands the roles and relationships of the Library Board and the library administration<br>▪ Practices strategic recruitment for new Board members<br>▪ Provides orientation and ongoing training as needed for Board members<br>▪ Provides timely and pertinent information and facilitates communication to support the Board's decision-making<br>▪ Motivates the Board to plan for the future needs of the library<br>▪ Motivates the Board to promote the library in the community |
| Competency: Trustees & Friends | Understands and sustains the library's roles and relationships with the Friends of the Library and/or Library Foundation |
| **Associated Skills and Knowledge** | ▪ Recognizes the benefits derived from a Friends group or Library Foundation<br>▪ Develops and monitors operating agreements between the library and the Friends group<br>▪ Maintains ongoing communication about the library's planning process and evolving goals and needs |

**Library Directors should have not only the skills and knowledge associated with the Management Competencies, but also a solid foundation in the library services and practices addressed in the Personal / Interpersonal, Public Services, Technical Services and Technology Competencies.**

## Personal / Interpersonal Competencies

*These competencies are foundational, most of them transferable to any workplace. In most situations in life, effectiveness is enhanced by clear communication, strong relationships, ethical behavior and the flexibility to be a leader, team player and lifelong learner.*

### Communication

Clear and effective communication is the basis for success in relationships with co-workers, managers, users and all stakeholders. Communication competency is integral to customer service.

| Competency: Communication | Communicates effectively using a variety of methods |
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| **Associated Skills and Knowledge** | ▪ Communicates openly and directly, both verbally and in writing<br>▪ Identifies issues and ideas to be communicated and provides information that is accurate and timely<br>▪ Presents ideas in a manner that is clear and concise, with an appropriate level of enthusiasm<br>▪ Demonstrates proficient writing and public-speaking skills |
| **Competency: Communication** | **Communicates effectively with a variety of audiences and individuals from diverse backgrounds** |
| **Associated Skills and Knowledge** | ▪ Speaks and writes in a manner that is professional, welcoming and appropriate for all audiences<br>▪ Demonstrates understanding of the perceptions, perspectives and communication styles of each audience<br>▪ Fosters an inclusive, affirming and respectful climate for communication |
| **Competency: Communication** | **Selects and applies the most appropriate and effective communication means to meet situational needs** |
| **Associated Skills and Knowledge** | ▪ Communicates effectively to obtain consensus, persuade, instruct and/or motivate<br>▪ Selects appropriate communication strategies to manage conflict constructively<br>▪ Demonstrates negotiation skills to secure beneficial outcomes |

## Customer Service

Customer service is every bit as important in the library as it is in the marketplace. While there are fundamental differences between library services and commercial services, the behaviors and expectations of customers are universal.

| Competency: Customer Service | Manages the library environment to enhance the user experience |
| --- | --- |
| Associated Skills and Knowledge | <ul><li>Organizes the library's environment to appeal to users and to meet their needs</li><li>Addresses the physical or mental barriers that could prevent people from using the library</li></ul> |
| Competency: Customer Service | Develops and evaluates standards and practices for the delivery of quality customer service |
| Associated Skills and Knowledge | <ul><li>Creates a customer service plan</li><li>Anticipates and maintains awareness of users' needs and wants through customer service surveys, complaint logs and other means</li><li>Analyzes input from users, evaluates the effectiveness of current services, and adjusts services and practices as applicable</li><li>Uses effective training strategies to teach staff good customer service techniques</li><li>Determines the relative needs of users, suppliers and library staff, and strives for balance in supporting them to achieve their goals</li></ul> |
| Competency: Customer Service | Applies customer service skills to enhance the level of user satisfaction |
| Associated Skills and Knowledge | <ul><li>Treats users in a welcoming, professional manner and provides other staff with an example of positive customer service</li><li>Acts as a goodwill ambassador for the library, promoting the library's values and services in all user interactions</li><li>Demonstrates thorough knowledge of all aspects of the organization that impact users (mission and vision, policies and procedures, collections and services, and system-wide strategies)</li><li>Recognizes, honors and responds appropriately to diversity and cultural differences</li></ul> |

| Competency: Customer Service | Applies effective techniques to address difficult situations with users |
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| **Associated Skills and Knowledge** | ▪ Encourages users to follow library policies; applies good judgment when deviating from official policies and procedures<br>▪ Deals with users' concerns efficiently and effectively<br>▪ Maintains a calm, professional manner in difficult situations and applies effective communication techniques |

## Ethics & Values

The library plays a crucial role in society and the community. Library ethics and values have been carefully formulated to fulfill the institution's commitments to the community and to guide the practice of everyone who works there.

| Competency: Ethics & Values | Understands and acts in accordance with the basic values and ethics of library service |
| --- | --- |
| **Associated Skills and Knowledge** | ▪ Understands the history of libraries and their role in society, both in general and in the particular community<br>▪ Understands and adheres to the mission, values and vision of the library organization<br>▪ Demonstrates familiarity with the Library Bill of Rights and the ALA Code of Ethics, and articulates the relevance to library service<br>▪ Understands privacy issues and protects user confidentially<br>▪ Understands and promotes intellectual freedom and freedom of information<br>▪ Provides equitable services to all users<br>▪ Recognizes, respects and addresses the diverse nature of the library's users and community |

## Interpersonal

Unless you work alone in a cave, you must interact productively with others in order to accomplish your own and your organization's goals. Master the interpersonal competencies and you have a recipe for success.

| Competency: Interpersonal | Develops and maintains effective relationships with others to achieve common goals |
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| **Associated Skills and Knowledge** | • Treats everyone with honesty, respect and fairness to build an environment of trust<br>• Contributes to a collaborative, committed and collegial work environment<br>• Pursues an understanding and embrace of individual and organizational diversity<br>• Shares knowledge gained through professional discussions, conferences, formal courses and informal channels with colleagues<br>• Gives and receives constructive feedback from coworkers, supervisors and users |
| **Competency: Interpersonal** | Applies effective strategies to manage organizational politics, conflict and difficult co-worker behaviors |
| **Associated Skills and Knowledge** | • Understands that organizations are inherently political (including libraries) and develops strategies to become an effective player<br>• Understands a variety of difficult behavior patterns and develops responses appropriate to each<br>• Understands and applies strategies for conflict resolution |

## Learning & Personal Growth

No matter what position you occupy or what your employment future holds, an embrace of lifelong learning and continual improvement will enrich your professional path and your life.

| Competency: Learning & Personal Growth | Manages the development of one's own career and ongoing improvement of skills and knowledge |
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| **Associated Skills and Knowledge** | • Understands the importance of lifelong learning for all levels of library work and actively pursues personal and professional growth through continuing education<br>• Recognizes the value of professional networking and actively participates in professional associations<br>• Understands and uses resources and strategies for keeping up with new ideas and technologies<br>• Seeks opportunities to apply new knowledge and to share best practices, research and experiences with colleagues |

# Public Services Competencies

*All of the services that interface directly with the library's users come together under the heading of public services.*

## Access Services

Access Services is like the circulatory system of the library body—it keeps materials flowing in, out and around in a well-regulated manner, striving to deliver the right item at the right time.

| Competency: Access Services | Understands the basic operations of the circulation function |
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| **Associated Skills and Knowledge** | ▪ Demonstrates general knowledge of the library automation systems in use and specific knowledge of the operations that apply to circulation procedures<br><br>▪ Accesses the OPAC (online catalog) and uses a variety of tactics to locate items in the collection (via subject heading, author, title, keyword searches, etc.)<br><br>▪ Explains and performs intra- and interlibrary loan procedures, document delivery, resource sharing, reserves and other information retrieval options<br><br>▪ Keeps current with changes in library automation systems |

## Programs & Services

Providing library services to the community is no trivial pursuit, given the diversity of needs and interests to be met. That door counts are up, circulation increasing and libraries thriving is a testament to the success of these programs and services and the competency of the people who make it happen.

| Competency: Programs & Services | Designs and implements library services to meet the needs and interests of the community |
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| **Associated Skills and Knowledge** | ▪ Analyzes demographic and other data collected about the community and develops services to meet the needs and interests of target audiences<br><br>▪ Identifies potential partner organizations within the institution or in the community that have compatible goals and objectives, and develops cooperative services and programs to extend and enhance library service<br><br>▪ Evaluates all services, using appropriate evaluation strategies, and uses the results to improve future services |

| Competency: Programs & Services | Defines and implements outreach services for the library community to increase use of library services and to reach underserved populations |
| --- | --- |
| **Associated Skills and Knowledge** | ■ Identifies individuals and groups not currently served by the library, determines needs, develops programs and services, and promotes them to the non-users with targeted marketing<br><br>■ Determines the best means to deliver library services to remote users (mail, bookmobile, online, multimedia) appropriate to library resources<br><br>■ Designs programs and builds collections and information resources to meet the special language and literacy needs of the community<br><br>■ Collaborates with other community groups to meet the literacy needs of target audiences |
| **Competency: Programs & Services** | **Uses Web tools and social networking communities to engage with and provide services to users** |
| **Associated Skills and Knowledge** | ■ Understands and articulates the importance of engaging with users in non-traditional ways that extend beyond the physical library<br><br>■ Investigates and evaluates tools, and identifies those most applicable to the library's services and community needs (blogs, wikis, widgets/toolbars, social networks, other emerging online tools)<br><br>■ Devises strategies to keep up with emerging tools and techniques, and connects with professional communities to seek and share best practices |
| **Competency: Programs & Services** | **Designs, implements and sponsors library programs that offer information, special skills or entertainment** |
| **Associated Skills and Knowledge** | ■ Demonstrates ability to be creative, promote new ideas and identify a variety of tools and techniques to create interesting and engaging programs<br><br>■ Aligns programs with the library's goals and objectives and with the identified interests and needs of the community<br><br>■ Actively involves users in planning, implementing and evaluating programs<br><br>■ Promotes the library's programs to the community in coordination with marketing efforts<br><br>■ Develops programs to acknowledge and celebrate the cultural diversity of the community<br><br>■ Evaluates programs, using appropriate evaluation strategies, and uses results to improve future programming efforts |

# Collection Development

A library's collection of materials is never static. New resources arrive continually; community needs and tastes change; obsolete materials must be purged. All of these decisions are deliberated, backed by thoughtful and coherent policy.

| Competency: Collection Development | Builds and maintains a collection of resources in many formats based on a determination of community needs |
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| Associated Skills and Knowledge | ▪ Demonstrates comprehensive knowledge of the library's collection (subject ranges, age, size, level, strengths and shortcomings) and applies the knowledge to the decision-making process<br>▪ Consults a wide variety of sources and connects with other professionals to stay informed about new materials, resources and technologies, and their potential to deliver improved services or reach new target audiences<br>▪ Strives to build a collection that is diverse, current and relevant, and reflects the ethnic diversity of the community<br>▪ Assesses and responds to the community's changing needs and interests to inform the ongoing development of the collection |
| Competency: Collection Development | Establishes and applies selection and evaluation criteria to build a collection of high quality and relevant resources |
| Associated Skills and Knowledge | ▪ Identifies and applies objective standards to evaluate the content of resources for accuracy and authority, and identifies any bias or point of view<br>▪ Selects and evaluates resources to assure their quality, pertinence, authenticity and inclusiveness<br>▪ Determines criteria for evaluating the format, access and presentation aspects of resources to inform selections appropriate to a range of ages and developmental stages |
| Competency: Collection Development | Researches and designs systems and services to provide optimal access to resources |
| Associated Skills and Knowledge | ▪ Determines and provides the appropriate mix of technologies, formats and delivery channels to meet the needs of a variety of users<br>▪ Identifies any factors that impede the use of resources and communicates with the information resource designers about usability improvements<br>▪ Researches and assesses emerging technologies for improved delivery of information resources<br>▪ Identifies opportunities to cooperate with other libraries, departments or community organizations to share information resources |

| Competency: Collection Development | Understands and establishes collection development policies and procedures |
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| **Associated Skills and Knowledge** | ▪ Develops policies and procedures for identifying and selecting library materials in all formats<br>▪ Insures that collection policies are consistent with the mission and broader policies of the library and the ALA Library Bill of Rights<br>▪ Develops policies and procedures for handling challenges to library materials<br>▪ Develops policies for weeding the collection, handling donations and gifts, and disposing of obsolete materials |
| Competency: Collection Development | Ensures that the collection is current, useful and in good condition |
| **Associated Skills and Knowledge** | ▪ Defines criteria and establishes procedures to evaluate library materials for retention, replacement, duplication or deselection<br>▪ Conducts inventories of library materials, analyzes usage and maintains appropriate records in support of maintenance procedures<br>▪ Recognizes items of true historic value and recommends their preservation and conservation for this library or for another collection |

## Patron Training

Depending on the size of library, there may be management positions or whole departments responsible for development of patron training programs. No matter where the responsibility resides, patron training and the advancement of information literacy are crucial ways in which the library serves its community.

| Competency: Patron Training | Develops training programs to build information literacy skills and to meet other educational needs of users |
|---|---|
| **Associated Skills and Knowledge** | ▪ Understands the scope and the importance of information literacy (including computer and media literacy) and defines information literacy goals applicable to the institution<br>▪ Identifies topics of importance and interest to library users and defines desired outcomes for patron training programs<br>▪ Identifies opportunities to partner with other departments or organizations to collaborate on training programs<br>▪ Evaluates training programs, using the appropriate evaluation strategies (post-class evaluation forms, debrief with trainers, etc.) and uses results to improve future training content and delivery |

# Technical Services Competencies

*Technical Services involves the full life cycle of information, including acquisition, organization, cataloging, dissemination and preservation.*

## Acquisition & Processing

Although this all happens behind the scenes, the more seamless the acquisition and processing of library materials is, the more satisfied the library user will be.

| Competency: Acquisition & Processing | Manages the processes by which library materials are ordered, received and tracked |
|---|---|
| Associated Skills and Knowledge | ▪ Determines the most efficient, cost-effective and customer-centered means to acquire and process library materials<br>▪ Keeps current with changes in publishers, vendors and other sources for purchasing library materials<br>▪ Identifies and implements new technologies for ordering and processing materials |
| Competency: Acquisition & Processing | Manages the expenditures and accounting for acquisitions |
| Associated Skills and Knowledge | ▪ Manages the allocation of the materials budget and negotiates the purchase and licensing of materials<br>▪ Maintains accurate budgets and accounts, including encumbered funds as well as expended funds<br>▪ Leverages partnerships with other libraries or organizations for discounted or cooperative purchasing options |

## Cataloging

The efforts of catalogers enable users to locate what they need in the library collections.

| Competency: Cataloging | Ensures that library materials are cataloged according to relevant bibliographic control standards |
|---|---|
| Associated Skills and Knowledge | ▪ Understands the general structure, relationships and relative importance of library catalog systems and software<br>▪ Applies relevant bibliographic control standards to organize materials and resources at a level appropriate for the library and the materials<br>▪ Understands the cataloging tools and services available from bibliographic utilities |

# Technology Competencies: Systems & IT

*There is an increasing variety and complexity of technology systems that drive library operations.*

## Technology Planning

Technology planning is closely tied to other competency areas. The planning process is all about project management, but with the demands of IT factored in; technology planning is critical in today's library.

| Competency: Technology Planning | Formulates and implements an ongoing technology planning process |
|---|---|
| **Associated Skills and Knowledge** | <ul><li>Collects relevant data (inventories of hardware and software, licensing requirements, subscription fees, upgrade and replacement requirements) and defines the criteria for upgrading or purchasing new equipment</li><li>Evaluates opportunities and requirements for expanded or new technology-based services</li><li>Establishes clear priorities for technology plans that align with the library's ongoing operations and strategic plan and the needs of the library users</li><li>Keeps abreast of emerging technologies and their impact library technology planning</li><li>Balances risk-taking with realism and alignment with library's priorities</li></ul> |
| **Competency: Technology Planning** | **Develops and maintains a library technology plan that meets current and future needs of the library community** |
| **Associated Skills and Knowledge** | <ul><li>Creates appropriate goals, objectives, and activities that reflect analysis of current and future community needs</li><li>Strives for compatible and stable systems and configurations for maximum reliability</li><li>Develops and applies evaluation measures that gauge the success of the plan</li><li>Anticipates changes, trends and influences to effectively allocate resources and implement appropriate library technology initiatives</li></ul> |
| **Competency: Technology Planning** | **Develops strategies and processes for purchasing technology for the library** |
| **Associated Skills and Knowledge** | <ul><li>Prepares the budget for purchase recommendations based on the technology plan, factoring in total cost of ownership</li><li>Adheres to the library's established rules and procedures for purchasing and maintains accurate records of transactions, specifications and standards</li><li>Prepares a Request for Proposal (RFP) to support sound purchase decisions</li><li>Identifies and negotiates with technology vendors to obtain products and</li></ul> |

| | equipment that best meet the needs of the users |
| --- | --- |
| | ▪ Leverages consortia and statewide procurement options |
| | ▪ Understands the processes for and implications of applying for government funding programs (E-Rate, LSTA, Universal Service discounts) |

## Technology Policies

Fairness, efficiency, security and more depend on the clear definition and application of policies for technology use. See Library Management > Laws, Policies & Procedures for general library policy competencies.

| Competency: Technology Policies | Creates, evaluates and implements policies and procedures for library technology |
| --- | --- |
| **Associated Skills and Knowledge** | ▪ Establishes network usage policies that balance convenience and usability with security concerns and wise stewardship of resources<br><br>▪ Articulates and applies library policies on privacy, intellectual freedom and filtering as they relate to technology access and use<br><br>▪ Seeks staff and stakeholder feedback during policies and procedures development<br><br>▪ Explains the rationale underlying library technology policies and procedures and communicates effectively in nontechnical language<br><br>▪ Continuously evaluates the needs for new or revised policies and procedures relative to changing technologies |

## Technology Training

There is a continual need for instruction as technology deployment intensifies in the library. Those who "get it" are in the best position to help those who don't. Seizing opportunities for informal knowledge exchange can often deliver the just-in-time learning that will ultimately provide better service to the library user.

| Competency: Technology Training | Provides training for staff and users on library technologies |
| --- | --- |
| **Associated Skills and Knowledge** | ▪ Assesses technology trends that will affect the library and its users and advises all appropriate stakeholders in the organization<br><br>▪ Aligns technology training with the library's overall objectives and efforts for staff and user training<br><br>▪ Provides opportunities for staff to explore new technologies in the library environment |

## Web Design & Development

Library Web sites range from simple to complex, but they all share an awareness of how important it is in today's Web-enabled world to connect with the library community through the Internet.

| Competency: Web Design & Development | Implements and manages the library's presence on the Web to place the library's services in the path of the users |
|---|---|
| **Associated Skills and Knowledge** | ▪ Understands the importance of having a Web presence to provide virtual, 24/7 access to a portion of library services<br>▪ Ensures the user interface is designed according to principles of usability and accessibility<br>▪ Investigates and develops other tools for extending online access to library content. |