



*“Strategic Planning Tools for the Tomorrow People –
Library and Information Professionals of the 21st Century”*

**Environmental Scanning: Discover What is Happening
Outside of the Library Doors¹**

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Introduction

Successful management of libraries depends on the ability of managers to anticipate and adapt to rapidly changing factors. Yet the lead time for decision making and responding to these changes is diminishing. Methods are needed that can quickly enable managers to understand the external environment and how it inter-connects to the library’s internal environment (Morrison 1991.) Successful organizations create specific divisions or departments to support this type of activity, and in fact, actually hire professional staff to gather environmental data on a daily basis.

Librarians...Professionals Scanners circa 1800...

Librarians have a two-fold advantage in adapting this process to library planning tool kits. First, librarians by profession are trained to gather and organize data for use in the most effective and efficient way possible. Secondly, the library is, by definition, a treasure trove of data and information. Thus, librarians can use their expertise to gather the environmental data, become their own best customers by utilizing the data for the library’s own best management practices. After acquiring this kind of information about customers [aka users] over a long period of time, librarians can more effectively provide

¹ This is excerpted from , “Environmental Scans: What They Measure and What it May Mean to Your Library,” *Marketing Library Services*, vol. 20 (3), May/June 2006, pp. 6-9

the right product at the right price and time, with the best communication tools, to targeted potential customer markets (Koontz 2003.)

Library and Information Agency Microenvironment

Marketers often define the internal environment as the “microenvironment.” This internal environment is interlocked in often an invisible partnership with the external environment. The more cognizant the organization is of this relationship the more proactively it can respond to change. The environment that the library resides in, and the materials and services that the library offers, ultimately affect the end users, the library’s customers. The internal environment includes those forces closest to the library’s operations and immediate control. The primary forces in the library’s internal environment are the customers, employees and professional staff, vendors/distributors and library stakeholders. Each of these groups is influenced by varying and differing forces that change over time.

Library and Information Agency Macroenvironment

The larger environment which is built upon those forces outside the library’s control is called the external or “macroenvironment.” These external forces can originate from local, regional, national or international levels. These forces include the state of the economy; the geographical characteristics and infrastructure; competition; legal and political restrictions and issues; technological developments; the media; natural resources; and the ever changing social and cultural conditions. Just as the internal environment changes, so does the external. The components of the internal environment are more immediate to the agency and therefore, better known. A greater effort is required to keep up with the changes in the external environment. Please see Figure 1 for a graph of the library, as it resides within the context of the internal and external environments.

Enter Tool #1: Environmental Scanning

This process of gathering information from these categories (as aforementioned) is in fact the process of “environmental scanning.” During this activity, management is constantly identifying strengths and weaknesses in the internal organization, as well as opportunities and threats from the external environment. Collectively, this is often called the “SWOT” list: assessing the strengths, weaknesses, opportunities, and threats of an organization and its environment. This scanning, gathering of critical and relevant data, and the SWOT review, results in the best opportunity to understand what factors facilitate offering optimal products and services that meet the specified needs and desires of its customers (Wymer 2006.)

Types of Environmental Data: Primary and Secondary

The environmental data that is gathered is either primary or secondary in nature. Secondary data is information that is already collected for some other purpose besides the original intended objectives, but can be used for the current marketing research application (i.e., environmental scanning.) Since the data is already in existence, the data collection task is much simpler and less expensive. If the data is not available, it must be collected from original sources for the purpose at hand. This data is called primary data.

This data collection process by contrast, is expensive and time-consuming, but sometimes necessary.

Environmental Scanning: a Proactive Tool for 21st Century Libraries

Librarians strive to optimally collect, organize and select data that meet their customer needs and their problems. That same expertise and process must and can be applied toward solving library problems. Every profession and business, whether it be a library, or any other type of organization, must determine, through secondary or primary research, which data is most relevant to its operations. To have vital data that best describes the internal and external environment of the organization at any given point of time, offers an optimal opportunity for the most successful delivery of the intended product offering. Experts (Morrison 1991) suggest the following guidelines for successful environmental scanning:

- **Seek signs of change.** Review the primary sectors (economic, social etc) for signs of change (e.g., what changes in the local, national and global economies, technologies, legal and regulatory factors will affect the library?)
- **Look for signals for potential events on the horizon** (e.g., the federal government is imposing Internet filtering for libraries, or on the local level--the county commission has two seats up for re-election and the director reports to the commission.)
- **Look for forecasts of experts** (e.g., ALA President Michael Gorman predicts that public library managers will be faced with more challenges to materials by right-wing conservatives, and or Bill Gates predicts 25% increase in public library building by 2010;
- **Look for indirect effects** (e.g., more federal funds are going to the Iraq war creating deficits in normally high federal library coffers and or on the local level—a need for more police cars decreases public money normally available for the library.)
- **Be aware that there are few guidelines on how to do scanning** (so my fellow colleague you are in fact the expert and better trained than most!)
- **Write abstracts** (a scenario that summarizes your organization's internal and external environments)

And remember that environmental scanning is rather new, not scientific, and guidelines are necessarily few. And in the end, only the good judgment of you the library professional—can decide what is worth monitoring.

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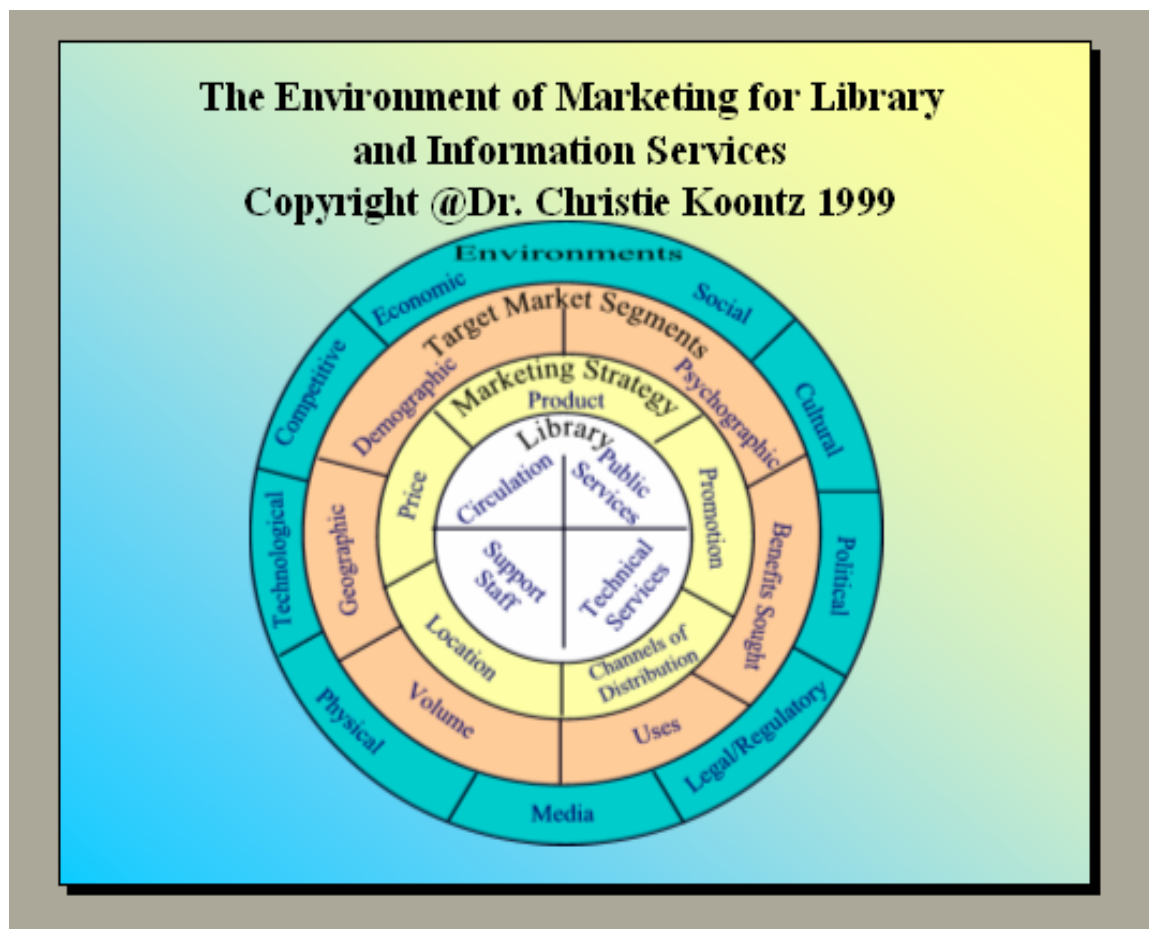


Figure 1. Environment of Marketing Library and Information Services