Management Basics

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Main reference:
Evans, G., & Greenwell, S. (2020). Management basics for information professionals (4th ed.). ALA Neal-Schuman.

Chap 1: Intro

- Broad organizational categories: formal and informal
    - Formal → voluntary and involuntary
- Chester Barnard (1956) said organizations have 5 major elements
    - 1) Size
    - 2) Interdependence: "shared common goals" / working together
    - 3) Input: resources used
    - 4) Throughput: process of using resources
    - 5) Output: end products
- Environmental scanning: "structured process for gathering information about activities, trends, relationships, competitors, potential dangers, and any other factors in the environment that can impact the organization" (Evans & Greenwell, 2020, p. 24).
    - key for planning and decision-making
    - useful for collection management and budgeting
    - Variables to consider:
        - customers' behavior and needs
        - competitors and the market
        - funding sources
        - suppliers
        - labor issues/presence of qualified staff

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        - legal and regulatory factors
        - economic trends
        - technology
        - political changes and trends
    - Three key variables to look for:
        - Customers (behavior and needs)
        - Competitors and the market
        - Suppliers (Information and tech)
- Six skill sets a manager should have per Perry and Christensen (2015)
    - Technical
    - Human
    - Conceptual
    - Interpersonal
    - Responsiveness
    - Focus on results + ethics
    - Additional relevant skills include finance, events, etc
- "Management is the art of getting things done through people" -Mary Parker Follett, 1941
    - Management is about people → people are unpredictable → management is unpredictable
    - All definitions include people and activities
- "Management is an activity essential to organized endeavors that perform certain functions to obtain the effective acquisition, allocation, and utilization of human efforts and physical resources for the purpose of accomplishing some goal." - Daniel Wren
- POSDCoRB = a manager's standard functions (Gulick and Urwick, 1937)
    - Planning
    - Organizing
    - Staffing
    - Directing

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    - Coordinating
    - Reporting
    - Budgeting
- At the bottom vs the top
    - At the bottom: more technical skills and less conceptual
    - At the top: more conceptual and less technical
    - Both at the top and bottom you need interpersonal
- Interpersonal vs informational vs decisional (Henry Mintzberg, 1970s)
    - Interpersonal roles:
        - Figurehead
        - Leader
        - Liaison
    - Informational roles:
        - Nerve center
        - Disseminator
        - Spokesperson
    - Decisional roles:
        - Entrepreneur
        - Disturbance handler
        - Resource allocator
        - Negotiator
    - Author adds: politician
- Major approaches to management
    - Scientific – focusing on time management or efficiency
        - Arose during Industrial Revolution
    - Administrative – focuses on staff motivation and having a common foundation
        - Formal structure
    - Behavioral – focuses on organizational structure and "the social side"
        - Team building

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        - Individual motivation
    - Management science – focuses on operations research and mathematical modeling
        - Rationality
    - Systems – focuses on interdependency and system theory
        - Everything is interlinked
        - Butterfly effect!
    - Contingency theory – no universals, environmental setting
    - Quality – focuses on customer satisfaction and high quality
    - Composite – multidimensional
- Generally organizations are split in three categories: private/for-profit, nonprofit, and public
    - For-profit organizations
        - can generally measure success by profit
        - Goal: maximum income
        - Limited ownership and stakeholders
        - Internal governance
    - Not-for-profit organizations
        - have a less obvious measure of success, and are influenced by stakeholders, partisan politics, and government funding
        - Goal: maximum social good
        - Broad ownership and stakeholders
        - External governance

Chap 2: Organizational Issues

- "Adaptability is essential for survival"
    - "There are no more than 63 organizations still in existence that were established before the fifteenth century" (mostly religious orgs or universities)

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    - Why do organizations die? Mainly failing to adjust to changes around them
    - Life spans of organizations have been getting shorter
- PSO: Public service organizations, working directly with and for the public
    - Increasing commercialization
    - Expanding the support base while maintaining key donor support and customers' loyalty
    - Pressure to "recover costs" for services provided
    - Libraries rely on tax funds from the government (could be the community, county, state, or national)
        - → because of the government, politics enters the chat
- Lines are blurring
    - Used to be a sharp line between for-profit and nonprofit
    - Blurred line between donation-based and publicly-funded
- "Limited funds often mean collaborative projects have a definite edge"
- "Stretching limited funds through partnerships is important; however, when the organization's real goal is just to secure extra funding, some strange partnerships can come into being"
- Four types of organizational environments (F. Emery and E. L. Trist, 1965)
    - Placid-randomized: org assumes goals and dangers will stay the same
        - Ex: large research archives in the past
    - Placid-clustered: goals are primarily long-term but adjusted based on surrounding events, assuming the need to adapt
        - Assumes dangers and opportunities will arise in clusters
        - Ex: a collection that doesn't change much at a school introducing a new degree program
        - Clustering: once there is questioning, it expands
    - Disturbed-reactive: environments with active competitors
        - Ex: Google Books Library Project vs academic libraries

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        - Competitive intelligence (CI): accurate information on your competitors
        - Goals are revised based on information about competitors
    - Turbulent: environments with high levels of competition, more room for radical changes
        - Ex: libraries s serving research teams
- Matching the organizational structure to the environment through two systems: mechanistic and organic
    - Mechanistic systems– emphasize specialization and hierarchy
        - Tends to change more slowly
        - Good for placid environments
    - Organic systems– work groups, flatter structure
        - Good for turbulent environments
- Forecasting: thinking about what might change and what effects those changes might have
    - A saying about forecasts: "The only certainty is the forecast will be wrong"
    - → Usually true as a saying but helpful in terms of being proactive and prepared
    - Often the data for this is available to the library from a parent organization, government, or in the library itself
    - Can be qualitative or quantitative
- Organizational culture (OC): the shared values, assumptions, and artifacts (Edgar Schein 1992)
    - Artifacts in this context: staff actions, things that are observable
    - Generally understood without being said
    - People notice when there is a violation of the cultural norm
    - View of top leadership sets the tone – especially when it comes to clarity and transparency

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Managing Planning and Assessment

Chap 7: Vision, Mission, and Planning

- More uncertain environments now than ever but "organizational aspirations and broad strategic directions don't often change fundamentally in the period of a few years, purposes and strategy are less subject to short-term shifts in the environment" in the public/nonprofit world per Michael Allison and Judy Kaye 2015, page 90
- Mission statements vs vision statements
    - Mission statements are the long-term strategy, and they are more constrained in scope
        - What do we want to do?
        - Requires "congruity between the library's capabilities, its operating environment, and its parent organization" (pg 90)
        - Relatively short, fairly general
        - Major limit: legally defined parameters
            - Libraries as sub-units of larger organizations
            - Solely nonprofits are constricted by articles of incorporation
    - Vision statements are "articulate, compelling, exciting, and challenging" as they paint a picture of the future
        - Ambitious but attainable
        - Must appeal to the staff and community
        - Vision as a "future preferred state of an organization and the corresponding statement" - Ronald Jantz 2017, pg 89 of the textbook
    - "A mission statement basically says who we are as a company and the vision statement says what we want to be in the future." -Piet Levy 2011, textbook page 92
- Value statement: the operational priorities and values

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    - Good staff exercise
- Planning for risk and uncertainty – Miles and Snow see four ways to deal with it (1978)
    - 1) Defenders: stick with what you do best
        - Keep to the path well-travelled
        - Works well for long-established organizations – at least, it has in the past
    - 2) Analyzers: moderate amount of risk tolerated in order to watch and analyze what works for other people before replicating
    - 3) Prospectors: risk is opportunity
        - Want to lead the way
    - 4) Reactors: only going to change in face of a crisis
        - Passive but the riskiest
- SWOT Analysis: strengths, weaknesses, opportunities, and threats
    - Two outward-looking elements (OT)
    - Two internal elements (SW)
    - Concerns with SWOT
        - *Per Everett and Duval 2010, textbook page 94
        - 1) Yields banal or misleading results
        - 2) Weak theoretical basis
        - 3) Implies the organization factors can be neatly categorized as positive or negative
        - 4) encourages "superficial scanning and impromptu categorization"
        - 5) promotes list building over thoughtful consideration
        - 6) does not consider tradeoffs
        - 7) does not account for gray areas (such as between accomplishments and strengths)
        - Author's addition: not really forward-looking
- Types of plans

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    - Strategic plans: long-term, initiated at the senior level, planning usually involves all the staff or most
    - Tactical plans: mid-term plans geared towards achieving strategic plans
        - Generally 6 months-3 years
    - Operational plans: short-term plans to guide staff in day-to-day activity
        - Generally 1 day to 1 year
    - Sub-tactical and operational plan categories (table 7.1, page 95):
        - Budget: effective use of funds
        - Goals: achievement of long-term purpose/strategic plan
        - Objectives: assist in achievement of goals
            - SMARTER technique: specific, measurable, acceptable, realistic, time-framed, extending, and rewarding
        - Policies: statements for guidance in decisions
            - Originated– the ideal, created in anticipation of a situation
            - Appealed– created due to lack of policy for a situation that has arisen
            - Implied– dangerous since it relies on perception
            - Imposed– from outside agencies/groups
        - Procedures: guides to actions, proper work method establishment
        - Programs: special purpose demanding use of the above
        - Projects: one-time activities in a fixed period of time, requiring careful planning
- Scenario planning: "develops alternative future possibilities" (page 98)
    - Developing plausible outcomes and analyzing the environment, trying to influence it positively
    - "Scenarios must be relevant, challenging, and plausible" (pg 98)
    - Predicts a reaction (if X then Y)

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Chap 8: Assessment, Quality Control, and Operations

- Assessment benefits:
    - Accreditation
    - Planning
    - Allocating resources
    - Marketing
    - Provide better quality service
    - Makes you competitive
- Assessment tools:
    - Sampling– small data set with reliable info about the overall population
    - Cost accounting– managing funds for efficiency and efficacy
    - Block diagrams– review and assess work relationships
    - Form analysis– "assess the utility of forms and other paperwork" (pg 114)
    - Decision flow charts– to visualize and analyze how decisions are made
    - Queuing theory– to assess and improve wait times ("effective in determining the optimum number of service points" -pg 115)
    - Game theory– allocation of scarce resources
    - Project management chart– to assist in planning and "visualize the relationships between activities and time" (pg 114)
- Assessment can take the form of:
    - Quantitative vs. qualitative
    - Surveys
    - Assignments
    - Benchmarking (pg 110)
        - Internal benchmarking
        - Competitive benchmarking
        - Industry benchmarking
        - Best-in-class benchmarking (for most effective practices)

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    - Balanced scorecard– provides feedback on internal operations and the outcomes for maximizing strategic performances from the following perspectives:
        - Learning and growth
        - Business
        - Customer
        - Financial
    - Return on investment
    - Informal and on-the-fly
    - Assessment in collaboration with other units
- Accountability means:
    - What's working and what isn't?
    - What can we improve?
    - Is it worth the time, money, and effort?
- Forms of services
    - Internal services are services provided to the organization's own staff, departments, or internal operations rather than directly to external users or the public.
    - Public services are services provided directly to the people the organization exists to serve -- patrons, students, faculty, researchers, community members, or other end users.
    - Inter-departmental/inter-agency services: These services cross organizational or departmental boundaries –- for example, providing research or data support for a university department (inter-departmental) or participating in a regional consortium for interlibrary loan (inter-agency).
- Community appraisal questions (from Prof):
    - Geography: How large is the community in both geographic area and population? What features does the community have (e.g., lakes, parks,

mountains)? What kind of access does the community have (e.g., public transportation, roads, broadband infrastructure)?
    - Economy: Is the community wealthy, poor, somewhere in between? What kinds of financial resources does the community have? Is the community's economy equitably divided across organizations?
    - Political factors: What kind of political environment does the community have? Who is in charge of the community as a whole and of the community serviced by the organization (e.g., a mayor, a university president, a CEO)? What are the relationships between the organization/its head officer and other organizations in the community? What is the relationship between the organization/its head officer and the community at large?
- Stakeholders appraisal questions (from Prof):
    - Demography: Who makes up the community? What are the age groups, races, ethnicities, socioeconomic groups? What languages are spoken? What are the levels of educational attainment? What is the median household size and income?
    - Usage of the organization: How much are community members using the organization's services? How many services are used? How frequently does that use occur? How many members of the community are using the services?
    - Unmet needs: What needs does the community have that are not being met by current organizational services from your organization? What needs does the community have that are not being met by current organizational services from other organizations in the community?

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Managing Money

Changes to your total operating costs → make strategic decisions about how resources are allocated.

Chap 17: Managing Money

- Manger's role = use resources effectively
    - Money = "the underlying resource upon which everything else in the library depends"
- Fiscal management involves:
    - 1) Identifying and securing funds
    - 2) Expending the funds
    - 3) Accounting for and reporting on how you spent the funds
- Effective stewardship involves (quoted pg 234):
    - 1) Assessing what needs doing (especially user needs) and the cost of the required activities
    - 2) Establishing priorities (with stakeholder input)
    - 3) Creating a plan (the budget)
    - 4) Presenting the plan to the appropriate funding bodies
- Budgeting for:
    - Planning
        - Continuously ask questions
        - Make estimates and compare them with actual results
        - Assess your organization's needs
            - Ongoing programs
            - Unit and department funding

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            - Staffing
            - New programs or priorities
        - Plan to underspend if possible. You can spend extra money later (never leave money unspent), but it's very hard to come up with funds if you hadn't planned for them.
    - Coordinating
    - Control (quoted from pg 235)
        - 1) Determine ongoing and desirable programs and establish priorities
        - 2) Estimate the cost of plans for each unit in monterey terms
        - 3) Combine all estimates into a well-balanced program
            - *This will require investigation of each plan's financial feasibility and a comparison of the program with institutional goals"
        - 4) Compare, for a given time, the estimates derived from step 3 with the actual results, making corrections for any significant differences
- Two types of budgets: operating and capital
    - Operating budgets: budgets that "identify amounts of money the library expects to expend on basic activities"
        - Covers a fiscal year (which can be the academic year or calendar year etc
    - Capital budgets: budgets for equipment and technology
        - Also new constructions/remodeling
        - Equipment in capital budgets is expected to last a couple years
- Budget cycle
    - Budget managers are usually dealing with 4+ fiscal years (last year, this year, next year, year after that)
    - Managers have to monitor expenditures and analyze them, adjusting if needed

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    - "Funding bodies usually look at how well the requesting unit actually used its prior appropriations" pg 236
    - Initial prep starts with unit supervisors → next level and so on
        - Requires some paring down after the fact because usually the number is not realistic
- Budgets have to include long-term commitments such as salaries, pensions, subscriptions, etc
- User base increase → pressure for more staff
    - "In jurisdictions with strong collective bargaining units, a workload agreement clause can cause a significant increase in staffing costs."
- Defending a budget request
    - Lots of competition for little resources
        - Also lends itself to internal politics (like "why did X get the new Y?")
    - Prepare your budget presentation
    - Show, don't tell
        - Use metrics, testimony, research, evidence etc
    - Don't be afraid to brag a little – keep your library's worth in the forefront of the minds of people who will make budget decisions
    - "Be prepared to defend your budget to both external and internal individuals."- slideshow
- Three key areas for lobbying/advocacy
    - 1) positioning oneself to be effective
    - 2) getting the most from lobbying sessions
    - 3) understanding "the lobbying arena" - Gloria Meraz 2002
- Advocacy process
    - Draw on the user base - ideally they are vocal
    - Working relationships with folks who have funding authority
    - Be cautious with promises so you can over-deliver

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- Within the OE (operating budget) there are specific accounts for specific things, called line-items budgets
    - Materials– for collection building
        - Second largest category for electronic and print collections, usually 25-30% of a total budget
    - Personnel– salaries, benefits
        - Largest category is staff salaries, usually 60-65%
        - Usually cannot change during the fiscal year and funds cannot move
    - Distribution/expense– goes to a particular unit, branch, or service
    - Administrative– expenses from "performing general management functions" (pg 239)
    - * Line-items budgets are the least complex and most common type of budget
    - * OE is unrestricted
- More types of budgets
    - Lump sum budget: a rare single allocation of funds for any use
    - Site budget: allocations tied to specific locations and meant for all categories of expenses
    - Formula budget: in educational settings, student numbers are linked to a funding amount (i.e. more students = more money)
    - Acquisitions budget: in academic libraries, some formulas try to achieve balance in spending across departments
    - Performance budget: focused on tasks rather than class of expenditure, expanding the line-item budget to assess performance and unit costs
        - Drawback: hard to assess quality, or at least the relationship of funds to quality
    - Program budget: links spending to programs that the library has
        - Drawback: longer to prepare
        - Requires three operational concepts:

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                - 1) Analytic examination of goals and objectives vs programs to meet them
                - 2) 5-year programming process plan and management-information system
                - 3) Budgeting mechanism to translate broad decisions into budget decisions (requires understanding of objectives, inputs, outputs, etc)
        - Planning programming budget: combination of program and performance, focusing on the planning
        - Zero-based budget (ZBB): focuses on the purpose and functions to perform in order to achieve mission and goals
            - Cost-effective through reviews of purposes and removal of extraneous activities
            - Phases
                - Construction
                - Planning
                - Budgeting
                - Control
- Accounting systems
    - 1) Accrual– expenses are recorded when they happen (order is placed, regardless if it has been filled yet)
    - 2) Modified accrual
    - 3) Cash– treats expenses and expenditures as if they are happening at the same time
- Fund accounting: a specific form of accounting based on nonprofit tax status
    - Focuses on social benefits
    - "Relative absence of profit-motivated behavior on the part of resource contributors (public and private)" (pg 242)
    - Government/constituent constraints
    - No profit

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        - *Different from no income!
    - "Usually involves many fragmented financial reports. Such reports focus on separate individual funds and the flow of liquid assets rather than income." (pg 242)
- Budget reports
    - Annual budget form– shows allocations
    - Monthly reconciliation reports– internal show of balances
- Accountability (notes from the slides)
    - Using money appropriately
    - Keeping track of expenditures
    - Any areas of excess waste? Any areas that appear to be excessively wasteful from an outsider's perspective?
    - Following local, regional, and national regulations?
    - Be prepared to provide evidence to various parties, including your boss, the CEO or president, and external auditors.
- Audits: "post-action review by an independent appraiser" (pg 243)
    - External audit– usually annual and done by a CPA (certified public accounting) firm to ensure the finances are accurate and following principles
        - Very thorough
    - Internal audit– parent organizations might do this to make sure all is swell
        - Financial records
        - Compliance
        - Operations (for efficacy)
        - Performance
        - Fact finding (if job classifications/descriptions are accurate)

Chap 18: Generating Income for Nonprofits

**Specifically intended for libraries

- Charitable gift sources:

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    - Individuals (roughly 70%)
        - "Typical modest gift comes from a native-born married couple with children, who own their own home, and who have at least some post-secondary education" (pg 255)
        - More likely to give if older, and more likely to give more
        - "The 'small' donor is often the most consistent donor over time"
    - Foundations/grants (roughly 16%)
    - Bequests (~9%)
    - Corporate gifts (~5%)
- Fundraising
    - Often largest way for a library to be generating additional revenue
    - "Many funding groups and agencies require matching funds. That is, the library has to demonstrate that it will provide a certain percentage of funds to the proposed project or program if funded."
        - Actual dollars and/or "in-kind funds" such as volunteer time
    - If available, use your institutional philanthropy, alumni, advancement, or development office
    - Expect many "no's" for every "yes"
    - Maintain good relationships
        - Friends groups foster good community relations, as well as funds
        - Send thank-you notes
        - Swag, seasonal cards
        - Consider including donors in your newsletter or website
        - Show how their money was used
- Internal vs external revenue
    - Internal sources:
        - Fines
        - Service fees (copying, printing, room rentals, etc)
        - Naming buildings or centers in exchange for a donation

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            - Could also be seating areas, commons area, sections of collections, etc
        - Wills, bequests, planned giving, etc
    - Supposedly internal but I see these as external:
        - Grants
        - Book donations
        - Tax increase
        - Collaboration with a business
            - Renting out space to a business and getting paid as a percentage of sales
            - My addition: merch
        - Millage increase: increase taxes (a mill is one one-thousandth of a tax dollar)
            - many states have a cap on millage rate
            - Voter-approved one-time resources
    - External sources
        - "the funds they generate are less susceptible to the funding authority treating them as replacement funds…the amounts generated may be small, but often they are significant" (pg 252)
        - "Library foundations share with Friends groups the role of providing financial support for a library"
        - Gifts to a library are tax-deductible (since they are almost always 501c3s)
        - Friends– small annual membership fees that give them a benefit of some sort or discounts on what they sell
            - Book sales are what they are known for
        - Foundations– handle library investments, focused long-term
            - They have a board and donors but no members
            - Seeks gifts but usually through annual solicitation
    - My additions: book sales, paid programming, etc

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    - "Few relatively predictable library-generated funds (user fees, endowment income, and other internally generated cash" - page 234, chapter 17
- Why donate?
    - Self-interested
        - Tax write-off → larger gifts
            - "The larger the gift and the higher the donor's tax bracket, the more likely it is to motivate a gift" (pg 256)
        - Self-esteem
            - increase in self-worth through being able to donate
            - Recognition for donating
            - People will think more highly of them
        - Access
            - Access to a service or space
            - Ex: memberships to museums
        - Memorializing/honoring someone
    - Altruistic
        - Exchange theory: when a person gets something from a charitable organization they feel obligated to make a gift
            - Could also take the form of mass mailing or honors etc
        - "Warm glow" when a donor gives to a good cause even though they have no direct connection
        - IMO: still self-interested and that is okay
- Stewardship: "once a positive outcomes has been achieved, stewardship is the key to securing future gifts…a form of accountability" (pg 257)
    - 1) Send a thank-you letter that mentions the dollar amount (for tax documentation and relationship-building both)
    - 2) Update based on the impact of a gift
    - 3) Seasonal greetings and birthday cards etc, small gifts
- Grants: unpredictable source of additional funding for specific projects in specific time frames

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- Most last 1-2 years
- Many state libraries have a list of their programs and other places to get grants
- IMLS (Institute of Museum and Library Services)
- "A key step in developing a grant is to know what a foundation's or agency's current funding priorities are" (pg 259)
- "Granting bodies set the overhead rate and what costs are allowed in the calculation of the overhead amount." (pg 259)
- Matching grants– requires the library to cover some of the project
  - Many grants take this form
  - Almost all allow volunteer time as a form of cost-sharing

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Laws, Ethics, and Managing Change

Chap 3: Legal Issues

- Laws vary by area since there are federal, state, and county legislative bodies that affect a library
- "When in doubt, seek legal counsel" (page 32)
    - Legal council usually takes the form of a law firm hired by the parent org
- Health + injury
    - OSHA site visits (mostly due to employee calls) to check on working conditions and inform workers of their rights
        - Rare for there to be fines, but sometimes they are given a deadline to correct problems
    - Older buildings → asbestos, environmental health problems, etc
- Disruptive user behavior
    - Be prepared to keep "the situation to its lowest possible level in terms of disruption and to resolving it quickly"
    - Key: "having sound legal policies in place and having staff trained in what to do and what not to do when a circumstance arises. It is essential to work with legal counsel when developing appropriate policies." (pg 36)
        - Legal counsel will be aware of local laws and court decisions that might be relevant
        - Post reasonable rules for access, hours, and behavior that "must reflect existing laws and policies and should be reviewed by legal counsel"
- Tort law and liability
    - "More so than at any other time, reviewing courts are increasing public administrators' liability when they violate or undermine the individual or constitutional rights of citizens or when the government fails to provide

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essential services for which they are to perform" - Stephanie Newbold, 2015 (pg 37)

- Libraries used to be produced by governmental immunity as tax-supported institutions but that is less true now
- Sometimes libraries are susceptible to being held liable for actions or failure to act

- Tort law: injuries resulting from negligence or intentional acts
  - One of the more common concerns in library liability is personal injury, physical or mental
    - Ex: forgetting to put out signs if the floor is slippery
  - Negligence requires:
    - The cause of the injury is a person, not an act of God
    - The person causing the injury has a responsibility and duty to the injured party
    - The duty is one of warning or one of action
  - Premises: everything associated with a building
    - Sidewalks, grounds, parking lot, lighting, anything inside, etc
    - Controller of the premises' duties fall into 3 categories (quoted below):
      - 1) Those involving invitees (users and staff in public areas)
      - 2) Those involving licensees (users and staff in nonpublic areas, such as technical services and administrative offices)
      - 3) Trespassers
      - *Descending order of duty
      - * Special duties to children and the mentally/physically challenged

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        - Unattended children are relatively common so first step is to "have clear policies and a plan of action" reviewed by legal counsel of course
            - Options include special programs for them, not permitting them, requiring a call to child welfare if it's closing time or after a specific amount of time, etc
            - Make it clear that the library does not assume child care responsibilities and post this somewhere (or provide to parents when a kid gets a library card)
- User privacy
    - Three categories of user information
        - 1) Data collected from a person upon registering
        - 2) Data about what a person uses (such as what books they check out)
        - 3) Data collected by library vendors after someone accesses their services
    - Online circulation systems usually are good for confidentiality because they can separate borrower from the items borrowed etc (pg 41)
        - Ex: you cannot see who checked out the book before you because it's online, not in the book itself
- Contracts and licenses
    - Contract: "voluntary, deliberate, and legally enforceable agreement between two or more competent parties…" (Business Dictionary)
        - Ex: Tom is paid to fix the roof
    - License: "revocable written or implied agreement by an authority or proprietor (the licensor) not to assert his or her right (for a specific period and under specified conditions) to prevent another party (the licensee) from engaging in certain activity that is normally forbidden" (Business Dictionary)
        - Ex: Five Below has a license to make Winnie the Pooh merch

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        - In ta library, licensing agreements usually "outline the library's (lessee's) responsibilities for such things as security, customer service, payment and delivery, limitations and warranties, termination, indemnification, and assignment"
    - Attorney fees are worth the attorney input
    - Ensure compliance
- Copyright
    - Most relevant legal issue in library world
    - Today, copyright is perceived as protecting intellectual property
    - Countries have different copyright laws
        - WIPO: World Intellectual Property Organization, UN agency to protect IP
    - IP has two categories:
        - Industrial property: inventions/patents, trademarks, industrial designs
        - Copyright: literary work, art, music, architectural designs
    - Fair use is a bit of a gray area especially with education
    - Ex: libraries have photocopy services and there are regulations about signage for these, otherwise a library can become liable for copyright violation
    - ILL: Interlibrary loan
        - "Copyright ground rules for how often a library may borrow articles from a single journal title before it risks a lawsuit or having to pay a fee for each item because of using ILL instead of subscribing to the title" (pg 44)
- Documentation
    - Document everything basically!!
    - Emails, handwritten notes, etc
- Malpractice unlikely
- Federal regulatory agencies and policies:

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- OSHA: Occupational Safety and Health Administration
  - Ergonomic standards for computer activities
- CIPA: Children's Internet Protection Act
  - If an organization receives federal funds for internet access they must use filtering software on the computers
    - → Primarily impacts school and public libraries
  - One POV: it has First Amendment implications in terms of adult access to internet information in public libraries
- ADA: Americans with Disabilities Act
  - Title 3 states that you cannot discriminate "on the basis of disability in the full and equal enjoyment of the goods, services, facilities, privileges, advantages, or accommodations of any place of public accommodation"
  - Applications for physical access:
    - Wheelchair ramps
    - Drinking fountain height
    - Restroom accommodations
    - Aisle width
    - My additions: places to sit, elevator option, automatic doors
    - Large-print books for visual impairment
      - –> But clearly not all books can be in large print soooo
- USA PATRIOT Act
  - Authorized searches without warrants and required that the library not even reveal there was a search at all
  - Came out of 9/11 since there was suspicion they communicated via public library computers
  - Section 215 allows the gov to secure secret warrants for "business records" (includes library records)
- DMCA: Digital Millennium Copyright Act of 1998

Simple Studies

        - Updated copyright law to include digital formats and conform to 1996 WIPO treaties/agreements
        - Title 2 is about Online Service Providers (OSP)
            - OSP is defined very broadly and thus can inclue libraries that offer electronic resources or the internet
            - Offers "safe harbors" that give the OSP safety from liability
- Examples of local library laws:
    - "While sales to public libraries are exempt from the sales tax, sales by public libraries are generally not exempt from the sales tax." - Wisconsin 2017
    - "Library records, which contain names or other personally identifying details…shall be confidential and shall not be disclosed except…upon request or consent of the user or pursuant to subpoena, court order, or where otherwise required by statute." -New York State Library, 2017

Chap 5: Ethics

- Libraries are one of the most trusted publicly-supported organizations
- SRRT: Social Responsibilities Round Table
- Managerial ethics: managers and supervisors set the tone for right and wrong personal actions
    - Lead by example
- ALA Code of ethics has eight points and was last updated in 2008
    - *No sanctions for violations so it is basically a guideline
    - 1) Access
        - Equity > equality
        - Impossible to equally service everyone
    - 2) Intellectual freedom (IF)
        - Broader in scope than censorship
        - Tied to the First Amendment
        - Library self-censorship is apparently a real issue
    - 3) Privacy

Simple Studies

        - Whether or not there is an ethical obligation to inform users of what information is collected
        - Whether or not you should inform database vendors about library policy and enforce the practice
        - Whether or not to view material in the library as proprietary
        - "Remember that in the United States any organization allowing internet access is considered to be an internet service provider [ISP] and may have some liability for a proven infringement if a user accessed the material through that ISP." (pg 70-71)
    - 4) ??
    - 5) Coworkers
        - "Individuals with an unhealthy self-concept are likely to use power-seeking strategies to regulate self-esteem" - Raskin, Novacek, and Hogan (1991), page 71 of textbook
    - 6) Self-interest
        - Accepting vendor gifts
        - Working with contractors again outside of work
        - Using library funds or services for acquiring items of personal interest
    - 7 or 8) professional development – more about motivation and goals than ethics
- Ethical approaches (table 5.1 and 5.2)
    - Common good: based on balancing individual and social good
        - Problem: a bit of a grey area
    - Contextualism: everything depends on circumstances
        - Problem: can appear to be inconsistent
    - Cost-benefit: greatest benefit for the least cost
        - Problem: possibly too focused on money
    - Kantian: people as the ends not the means

Simple Studies

        - Problem: "for libraries, people are both the means and the ends" (IOW sometimes people are both!)
    - Moral obligation: social good
        - Problem: varies amongst social groups
    - Moral rights: social rights
        - Problem: varies amongst social groups
    - Theological: religious beliefs for guidance
        - Problem: different religious and possible distrust
    - Utilitarian: greatest good for the greatest number of people
        - Problem: hard to determine
        - My add: Trolley Problem, other responsibilities
- Dave Anderson (2011) – no white lies
    - Keep an eye out for "just tell them that" (pg 67)

Chap 10: Managing Change

- "change in the twenty-first Century is constant" (Chang & Bright, 2012, p. 214).
- "The fact is, we live in a universe where change is inevitable, constant, and unavoidable" (Evans & Greenwell, 2020, p. 133).
- key: handle change proactively and productively because "Staying static is often the worst choice in a changing environment" (p. 133).
- In the workplace, people resist change because it is often not their choice (Evans & Greenwell, 2020)
    - Change is usually by force lol
    - people resist change when they don't understand what is happening Zidle (2011a)
    - "Almost 70 percent of change efforts fail to achieve all or most of their objectives" (Evans & Greenwell, 2020, p. 137) because managers are not prepared for radical change.
- Radical vs. Incremental Change

Simple Studies

    - radical change: change that is fundamental, and thus quick to disrupt the status quo (no no no!)
        - "difficult to take in hand," "perilous to conduct," and "uncertain in its success" (Evans & Greenwell, 2020, p. 134) per Machiavelli
    - Incremental change: changes that are more like adjustments
        - more common change (Evans & Greenwell, 2020).
        - Incremental change can still meet considerable resistance because low stakes can mean that people cling to what they know until they are forced to change, and they can put things off until the change becomes an emergency.
        - To be successful: "a state of constant small changes…that all lead toward larger change goals" (p. 135).
            - Collect data and analyze when your organization needs change/is ready for it
            - Incentivize change
- Three models of change: are Kurt Lewin's Force Field Analysis, John Kotter's Eight-Stage Change Model, and Emergent Change (Evans & Greenwell, 2020).
    - Lewin's Force-Field Analysis: the key is understanding the person, unit, or organization and how it must overcome the status quo to change
        - driving and restraining forces acting on the equilibrium (driving force needs to outweigh the restraining force)
        - three necessary conditions to change:
            - Unfreezing is the "process for creating a readiness to acquire or learn new behaviors" (p. 136). You need to help people see the need for change and the benefits of the change for themselves and for the organization. This can take time and be difficult if staff are not cooperating.
            - Changing is the "period where staff begin to work with the new behavior pattern." During the changing period, there is often a "testing period" where people try things and see if

Simple Studies

they like them. A manager has to keep an eye on this because people can fall back into old patterns, and should be extra supportive of staff during this period.

- Refreezing is when "staff internalize the change, and it becomes part of the organizational culture" (p. 136). The key in this step is using rewards. Lewin's model can be seen as comparable to "overcoming bad habits by replacing them with new and better habits" (Brisson-Banks, 2010, p. 244).

- John Kotter's Eight-Stage Change Model: change takes time and leadership across the board
  - breaks down Lewin's steps into smaller components (Evans & Greenwell, 2020):
    - Unfreezing requires the manager to (in order), instill a "sense of urgency," "create a guiding coalition," "develop a vision and strategy for the change," and "communicate the change vision" (p. 136).
    - Changing requires the manager to give staff the power to act, generate small wins, and "consolidate gains," meaning you "don't declare victory too soon" (p. 137).
    - Refreezing becomes anchoring, which may take years.
- Emergent Change: change is not a linear process but rather "an open-ended process in which unexpected turns and events are normal" (p. 137).
  - Help people cope
  - People need to be open to learning and help

- Reactions to Change
  - inevitable
  - People may resist when they don't feel the benefits outweigh the costs and risks (The World with Theory of Constraints, 2010).

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    - Denial- a person thinks, "This is not my problem," or "This does not need to happen."
    - Resistance- can be conscious or unconscious.
    - Exploration- “the first phase of actively accepting the need to change” (p. 138)
    - commitment - people are working toward implementation of the change
- Why resist?
    - the fear of losing job security
    - discomfort of the unknown
    - loss of control
    - learning anxiety toward gaining new skills
    - competing commitment
    - fear that one cannot succeed in whatever the change brings
    - lack of information because people respond better to details
    - poor communication because people respond better to honesty and openness
    - a feeling of having no say.
- Managing people’s resistance
    - education and communication, participation and involvement, facilitation and support, negotiation and agreement (Evans & Greenwell, 2020).
    - create an environment that accepts change.
    - The key is to find the right level of stress to increase performance but not hinder it. Zidle (2011a, 2011b) also says to analyze your own feelings about change, obtain as much information as possible about the change, decide carefully when and how to communicate about the change, explain details of the change clearly, emphasize benefits but don’t exaggerate, and anticipate people’s concerns, then address them. Keep in mind that some conflict is necessary for growth (Evans & Greenwell, 2020), but you also want to be aware of the stress caused by organizational change. While some level of stress improves productivity (over staff with no stress who

Simple Studies

are bored), too much stress leads to a shutdown. As a manager, you can't know what will cause stress for each person, or how much, and you can't know what will help alleviate stress for each person, but you can offer professional development on coping strategies.

- Innovation vs creativity
    - Creativity = new ideas
    - Innovation = the process of implementing new ideas
        - To foster innovation, welcome ideas so staff see themselves as part of the change process, accept risk-taking, be flexible, allow people to explore their ideas, support, allow people to learn from mistakes rather than punishing them, tolerate conflict, and be an open and honest communicator. Avoid micromanagement as it negatively impacts the generation of new ideas, independent thinking, and personal responsibility. Anthony (2014) also says fostering innovation requires understanding the users and the institutional mission and persuading "librarians that the need for change is urgent" (p. 6), tying back to Kotter's sense of urgency. "Leaders need to balance the maintenance of 'order', which is required for efficiency, with the development of 'diversity' to generate innovation to meet future demands" (Leong & Anderson, 2012, p. 491).
- Efforts to innovate should start with a focus on user needs (Evans & Greenwell, 2020). This means including users in innovation discussions and in planning for change.

Simple Studies

Leadership

Chap 4: Leadership

- Leadership vs management- Management often painted as a negative, but in reality you need both to run things effectively
    - Manager
        - Rules, policy, and procedure
        - Systems, structures, and tradition
        - How and when
    - Leader
        - Innovation, creativity
        - Inspires others
        - What and why
- What makes a leader:
    - Inherent traits
    - Behaviors
    - Relationships
    - Hierarchy
    - Environment and external factors
    - Flexibility, no one-size-fits-all
- Leadership theories
    - Adaptive leadership: What is likely to happen in a changing landscape? How can I react?
        - Fulmer (2000)
    - Servant leadership: Great leaders serve first and foremost, and empathy is key
        - Greenleaf (1977) and Schwarz, Newman, Cooper, & Eva (2016)
    - Transformational leadership: Traits and behaviors matter, especially in how you influence others
        - Burns (1978)

Simple Studies

    - Contingency theory: No single right way to lead, based on relationships and tasks
        - Fiedler (1978)
    - Situational approach: Focuses on environment, such as interactions, needs, nature of the work, and ethics
        - 1960s
    - Behavioral approach: How do autocratic, democratic, and laissez-faire leaders work?
        - Lewin, Lippitt, & White (1939)
    - Trait approach: Inherent traits that determine your life path
        - Early 1900s
- Key skills:
    - emotional intelligence
    - Lead by example with empathy, optimism, calmness, service, etc
    - Observe leaders you admire
    - Seek feedback
- Leadership online
    - Thoughtful communication
    - Prioritize and make expectations clear because there is a LOT of information
    - Express trust (especially if without verbal cues)
    - Respect your time and everyone else's

Chap 6: Accountability, Authority, Power, and Delegation

- Accountability draws on authority, power, duty, and responsibility (pg 77)
- Power: "the ability to do something" (pg 77)
- Authority: "the right to do something" (pg 77)
    - Traditional authority: comes through a "divine right" such as royalty

Simple Studies

    - Charismatic authority: "moral authority gained through an individual's special abilities, vision, or sense of destiny" (pg 80)
    - Legal authority: "function of the position held by a person; it resides in the office rather than in a person…derives from laws established by legislative bodies" (pg 80)
    - Legitimized by:
        - Socialization
        - Formal role and rank
    - "An active process that is both subjective and reciprocal"
    - Flows upward from staff to superiors and downward through the org structure
- Influence: "the ability to use words or actions to cause others to change their behavior" (pg 77)
    - Implies persuasion
    - Can exist without power
    - Key skill for managers
    - Respect is necessary
- Methods for structure/delegation (WHAT??)
    - Functional: splits into three primary functions
        - Inflexible
    - Customer: personalized focus
    - Territorial: convenience/speed of service through branches
    - Product: high quality service by expert staff
    - Usage: maximizing use of limited resources
        - Less focused on customer
    - Matrix: flexibility in use of staff skill sets
        - Limited by multiple supervisors
    - Teams: short and long term efforts
- Libraries always have an oversight group such as trustees or committees in addition to the parent org

Simple Studies

- Kinds of power
    - Expert– derived from specialized skills/knowledge/training
    - Referent– by personality and vibe, not formally
    - Reward– ability to motivate with rewards/incentives
    - Coercive– forcing compliance through threats/punishments
    - Reciprocal– power flows from staff to admin and back
    - Legitimate– power based in one's position rather than persona

Chap 9: Decision Making

- Fight vs flight vs flow
    - Flight– avoid risk and conflict and change
    - Fight– change is an opportunity, confidence in decisions
    - Flow– in the middle
- Environments
    - Routine/simple
    - Intricate/complicated
    - Convoluted/complex
    - Turbulent/chaotic
- Programmed vs non-programmed decisions (pg 121)
    - Programmed decisions are routine and regular
    - Non-programmed decisions are infrequent, riskier, and have uncertain outcomes
- Rationality
    - Bounded rationality: we can never be 100% logical (Herbert Simon, 1976)
        - Constraints include time, money, information, conflicts, etc
    - Rational decision making rests on 3 assumptions (pg 122):
        - 1) The decision can be made if complete info is avail
        - 2) No bias or emotion

Simple Studies

        - 3) Predicting the future / knowing future directions… what is best right now might not be for the future
- Types of solutions (pg 124)
    - Interim solutions: buys you time while you look for the cause or a long-term solution (band-aid solution)
    - Adaptive solutions: allow the organization to keep functioning (more like a plaster cast)
    - Corrective solutions: resolves the problem
    - Preventative solutions: solves the problem at hand and for the future
    - Contingency solutions: establishment of emergency procedures
- Voting paradox: majority wishes clash when there is 3+ people with 3+ options
    - Even with simple yes/no or ranked voting
    - Ex: I want cover 1, but if not 1, 2, and if not 2, then 3. Tom is the other way around and Anne prefers number 2.
- Four Cs:
    - Concessions + consensus are keys to a resolution
    - Consideration: you can't always get whatcha waaaaant
    - Coalitions: assist in moving matters forward

Chap 21: Other Managerial Skills

- Manage teamwork - collaboration both informal and informally
- Manage time
    - Plan ahead for meetings
    - Politely and professionally say NO if needed
    - Respect everyone's time
- Manage yourself
    - Take vacations and sick time
    - Ask questions and embrace feedback
- Stage persona - Some people like to do this for presenting

Simple Studies

Communication + Staff

Chap 11: Communication

- Basic communication: sender and receiver
- Basic communication problems:
    - Words mean different things in different context
    - Tone
    - Feedback
    - Culture
    - Means of conveying message
    - Contrast between words and body language or action
    - Previous miscommunication (perhaps from another manager)
- Types of communication: written, oral, nonverbal
- Suggested communication strategies:
    - Understand the context and adjust accordingly
    - Admit when you misunderstood
    - Ask questions and seek clarification
    - Take notes
    - Listen to hear, not to respond
    - Be clear and consistent
    - Wait to respond if you're angry or upset
- Negative impacts to listening
    - Leveling: receiver changes the meaning of a message because they omit certain elements
    - Sharpening: part gets more emphasis than intended
    - Assimilating: adds elements to the message expanding its meaning
        - "[retaining] the entire original message and [adding] elements to it, thereby expanding the original meaning" (2020, p.204).

Simple Studies

Chap 13: Staffing

- Notable hiring laws
    - Equal Employment Opportunity: Right to employment without regard to race, color, religion, sex, age, or national origin
        - Combats discrimination
    - Affirmative Action: Workplaces must make extra effort to hire protected minorities: women, Latinx, Asian and Pacific Islanders, African Americans, and American Indians
        - Organization should mirror the general population
    - Local and state laws
    - You can't ask how long they are planning to work until they retire
- Orientation
    - What do they need on day one? Logins, parking pass, where are the bathrooms
        - My addition: what to wear, what to bring
    - What do they need in the first week? First month? First six months?
    - Training can take significant time
    - Plan who will train and when
    - Share relevant policies and documents
    - Encourage questions
- Evaluating and retaining staff
    - Open communication
    - Bring up issues as they happen, don't wait for reviews
    - Address problems early and set strategies to correct
    - Use evidence such as documents, awards, peer evaluations, statistics, and on-the-fly feedback (such as thank you notes)
    - Identify goals
    - Be clear and consistent
    - How can you help your staff succeed?
- Corrective action and grievances

Simple Studies

    - Possible consequences
        - Revoke privileges such as a flexible schedule or work from home
        - More frequent check-ins
        - Less autonomy in the types of projects they can work on
        - Informal warnings
        - Formal Performance Improvement Plan (PIP)
        - Firing (generally a last resort unless dangerous or illegal)
    - Focus on facts
    - Be clear and explicit in your expectations
    - Take issues seriously and try to resolve them

Chap 14: Enhancing Performance

- Organizational development increases effectiveness overall
    - Total systems approach
    - Create a trusting culture
    - More collaboration
    - Recognize staff accomplishments
    - Freedom for staff to make choices
- Team building!

Chap 15: Managing Diversity

- Everyday DEI
    - Promote a culture that values diversity
    - Create policies to recruit and retain diverse staff
    - Provide a system for employees to report discrimination
    - Take discrimination reports seriously
    - Review job postings, handbooks, and documents to avoid bias
    - Listen and learn continuously
    - Own up to any mistakes

Simple Studies

    - Focus on long term buy-in and problem solving
- Williams' ten lenses on cultural diversity (2001):
    - Assimilationist: favors nationalistic and patriotic ideals
    - Colorblind: seeing people without race
    - Cultural centrist: improving welfare by focusing on identity
    - Elitist: superiority of the upper class
    - Integrationist: breaking barriers and working together
    - Meritocratist: "dreams will come true if you have the abilities and work hard" (pg 207)
    - Multiculturalist: celebrates diversity and how it contributes to "national character"
    - Seclusionist: wants everyone separate
    - Transcendent: focus on the human spirit, sees diversity as something that "contributes to the richness of humanity"
    - Victim/caretaker: feels that those that suffer should deserve compensation

Chap 16: Motivating Staff

- Theories of motivation
    - Contextual: informed by Maslow's hierarchy of needs
    - Process: we want to accept responsibility, receive rewards
    - Reinforcement: positive reinforcement rewards good outcomes
        - Operant conditioning

Simple Studies

Marketing, Advocacy, Facilities

Chap 12: Advocacy and Marketing

- Marketing process
    - 1.Generic product definition: define services and mission
    - 2.Target group definition: break the market down into smaller units (ex: students)
    - 3.Differential marketing analysis: different marketing for each unit
    - 4.Customer behavior analysis
    - 5.Differential advantages analysis: meet their unique needs
    - 6.Multiple marketing approaches
    - 7.Integrated market planning: coordinate your efforts
    - 8.Continuous market feedback
    - 9.Marketing audit
- Marketing methods
    - Logos and branding
    - PR press release
    - Website and social media
    - Events
    - Newsletter
    - Posters
    - Work of mouth (very important and all library staff can participate)
- Public relations: developing relationships with customers and community
    - Build relationships
    - Make announcements
    - Communicate in the wake of controversy, upheaval, or disaster
    - Use issues to build trust by swiftly resolving them
- Advocacy
    - Make values known
    - Local, state, national offices
- Branding: development of a symbol that illustrates the spirit of a product or org

Simple Studies

- Marketing: assessing customer's needs + wants and figuring out how to meet them

Chap 19: Managing Technology

- Technostress: stress/strain related to struggling to adopt new tech
    - *or new ICT: information and communication technology
- Ongoing organizational development
- Internal vs external experts
    - Just because someone is good at using a tool, they may not have the skills to train someone else to use it
    - Good trainers demonstrate patience, repetition, hands-on learning, and staying focused on one task at a time
- Prioritize tech that meets needs and assess it for effectiveness
- Safety and security of physical materials
    - Make a plan for any physical damages, and plan for when, not if
    - Things to consider:
        - ∘Dust
        - ∘Humidity
        - ∘Food and drink
        - ∘Storage and location
        - ∘Theft and vandalism
        - ∘Viruses and malware
        - ∘User error
- Safety and security online
    - Passwords
    - Firewalls
    - Viruses (have anti-virus software)
    - Personal information collected
    - Policy for protecting user data

Simple Studies

    - Local and federal laws (ex: CIPA, which requires school and public libraries to use filters in order to receive funding)
    - Dual authentication
- information system control → strong passwords
- processing control → remote diagnostics
- physical facility control → biometrics
- privacy control → restricted access to personal data
- ICT planning
    - Rolling plan allows for reviewing and revising (pg 264)
        - Benefits of long-term planning with short-term flexibility
    - Strategic considerations
        - "Useful to think about technology both offensively and defensively. From an offensive viewpoint, considering how to achieve or realize maximum benefit from the use of ICT is vital. Defensively, think in terms of controlled growth and what is happening in other libraries." (pt 264)
    - Emberton's 1987 holistic planning approach
        - Gain agreement on current state of affairs
        - Examine each goal and activity and ask if ICT could assist

Chap 20: Managing Facilities

- Building safety
    - Cleaning
    - Lighting
    - Plumbing
    - Broken/damaged materials
    - ** Know who is responsible and who to call for problems
- Building security
    - Aggressive patrons

Simple Studies

    - Sexual harassment
    - Misuse of service animals or other medical exemptions
    - Opioid addiction
    - Ransomware, hackers, malware, or scams
    - Unsafe internet practices
- Emergencies
    - Have a plan, including priorities, contact info, procedures, and training
    - Practice drills
- Sustainability
    - Energy use
    - Water
    - Smart features
    - Using natural landscapes
    - Renewable resources
    - My add: reuse, reduce, recycle!
- Risk management: a program that identifies potential problems and their possible solutions

Planning

Inputs

Inputs are the resources required to make your program or service possible. Examples:

- Funding
- Staff time
- Technology
- Equipment
- Supplies
- Collections or materials

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Outputs

Outputs are the measurable results of your program or service – these are typically quantifiable (How many? How much?). Examples:

- Number of participants
- Number of programs offered
- Number of new users
- Number of circulations or downloads
- Access to new resources or services

Outcomes

And finally, let's think about potential outcomes of your new program or service. You've already listed some quantifiable results (outputs), but you may also expect some less measurable changes to occur because of your new program or service. Changes in knowledge, attitude, behavior, etc. are considered to be outcomes, and while identifying potential outcomes is not quite as persuasive as the more objective outputs you've already listed, they can help to build a case for getting the approval and funding you seek. Outcomes can be things like increased awareness, improved morale, stronger partnerships, etc. Make a list of any outcomes your new program or service might create or influence.

Outcomes are the broader changes your program or service is expected to create. Examples:

- Increased awareness
- Improved skills or knowledge
- Stronger partnerships
- Improved morale
- Greater community engagement

Tasks

List all tasks required to implement your program or service. Your list may include things like:

- Selecting dates, times, or locations
- Researching vendors or resources

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- Ordering materials or equipment
- Creating instructional materials
- Marketing and promotion
- Registration procedures
- Staff training
- Launch-day activities

Simple Studies