

# The Power of Personal Persuasion:

**Advancing the Academic Library Agenda from the Front Lines**



**Toolkit**

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During my ACRL presidential year, my vision was to prepare frontline librarians and other library workers for grassroots library advocacy. This would include developing their self-confidence and advocacy skills so they can advocate for their academic libraries on campuses, within academic departments and other campus units, within college and university faculty senate governance, and/or within the library itself. To that end, this toolkit is designed to provide participants with the knowledge, skills, and abilities to integrate power and persuasion into the organization.

This toolkit is a result of an initiative designed to empower all academic librarians and library workers with the following skills:

- Ability to define their own personal power and a belief that they have power and influence
- Knowledge that personal power is “possible” from the individual on the frontlines
- Ability to articulate how they can lead from the “bottom” or the “front” by determining how frontline librarians get “permission” to further the agenda; by identifying institutional mechanisms for individuals to deliver the message; and by identifying techniques for delivering the message
- Ability to advance the academic library agenda by helping them to reflect on their own personal circles of influence and the strategies that would be most persuasive.

CAMILA A. ALIRE  
ACRL President, 2005–2006



# Toolkits

## What Are They? How Does One Use a Toolkit?

The term *toolkit* is used to describe a structure or set of information and content to be used for a **specific purpose**. Tools or content elements in the kit are designed to provide a target audience not only content, but also diverse techniques for delivering content to meet project or purpose goals. These goals can include: vision, goals, strategies, and action plans; definitions and fact sheets; target audience identification; environmental scans; methods for small group and interactive real-time and asynchronous communication; contacts and forums for the toolkit audience; time lines; best practices; pathfinders; visuals such as flowcharts, graphs, paradigms, and paradigm shifts; organization and individual self-assessments; tutorials; learning modules; case studies; research; and archives and links to other relevant resources.

With the opportunity to deliver toolkits through dynamic Web environments, the design of “living” toolkits greatly increases the diversity, depth, use, and value of toolkit content. As education and training of frontline librarians expands from conference program training to programs and workshops throughout the states, this toolkit will be increased to include examples of:

- *Content*, in a variety of formats, prepared for individual institutions, states, etc.
- Best practices of *processes* for training frontline librarians
- Best practices of *successes* of frontline librarians in institutions
- Examples of academic library *messages*
- Case discussions of “*lessons learned*” as frontline librarians assess their current roles and refine, revise, and deliver messages

### Specific strategies for the toolkit include the following:

- Design basic and “train-the-trainers” content for academic librarians (learning module content to be presented through the toolkit as an advanced organizer, PowerPoint of content for delivery of message).
- Define and provide content on personal power/the power of “one” and the personal power of professionals in the workplace (scenarios, case methods, self-assessments).
- Define persuasion and the role of persuasion and presentation in advancing the agenda of the academic library (best practices, lessons learned).
- Identify and provide processes for nurturing and structuring mechanisms and networks in organizations for individuals to further the agenda and vision of the academic library and information environment (organizational self-assessments, best practices, paradigm shifts).
- Outline best practices and lessons learned on power and persuasion coming from the front lines in organizations in general and in library organizations (best practices, lessons learned).
- Provide content on power and persuasion and how these organizational elements relate to leadership from the front lines (learning module content presented through advanced organizers, PowerPoints).
- Design processes for how one leads from the “bottom” or the “front” (best practices).
- Establish processes for frontline librarians to gain “permission” to further the academic library agenda (best practices, scenarios).



# Power in Organizations

## Personal Power, Persuasion, and Leadership for the Frontline Academic Librarian and Library Worker

When researching “power” and/in organizations, there is much professional literature on achieving power, power and leadership, and power and influence. Discussion of power in organizations, in general, focuses on: position power versus personal power; stages/types of power; steps for getting and keeping power; and how power is different in different types of organizations and with different people (gender, age, etc.) The researcher quickly finds out, however, that there isn’t much out there connecting *librarians* to power. What does come up frequently is the connection of *libraries* to power, specifically, *school libraries*, with their use of the word *power* in their national standards and their frequent use of “knowledge is power” and “information is power.”

However, one should *not* jump to the conclusion that this means librarians in general or librarians other than school librarians don’t have or seek power. Quite the contrary, many librarians constantly and consistently strive for power and to position themselves, their libraries, and, especially, access to their library resources and services in the legislative national arena as well as in the state, regional, local, and institutional legislative and many other arenas.

The reality is that, although the study of power is important, few can expect to achieve positions of power and few employees ever find themselves in positions where they can influence the success of their organization by assuming power through their position or title. Many believe that using personal power *is* an avenue for influencing the directions of organizations and focusing on personal power and influence; specifically, the technique of influencing others by using persuasion techniques is recommended.

Clearly, the primary responsibility for positioning the library within the institution typically rests with senior administration. In fact, when one reviews job descriptions, evaluation forms, communication plans,

and marketing plans, to name just a few documents, most of the language does not focus on frontline librarians’ responsibility for internal outreach for the express purpose of positioning the library and advocating for the library and library resources and services. Clearly, frontline librarians have articulated responsibilities for outreach that include outreach to/for:

- Decision-making groups such as curriculum groups, technology/Web groups, general planning, accreditation groups
- Discipline-specific faculty groups, including departments, divisions, task forces
- Faculty groups, including faculty senate
- Institutional standing committees such as academic deans’ meetings
- Institutional ad hoc committees such as new advising standards or registration issues
- Hiring groups
- Groups brought together for training

However, this outreach is usually specific to a task at hand, such as library assignments integrated into the curriculum, planning for a new campus library, establishing library budget needs, or bringing librarian issues to a decision forum such as a faculty senate. Thus, frontline librarians are not typically “charged” to advocate for the library internally in general or specifically.

Everyone within the institution must realize that, within the institution, general advocacy and specific task-oriented advocacy must take place for the library to be in the best possible position for planning, budgeting, leadership, and management.

How might this be realized? Managers should assess the organization’s documents to ensure that:

- Internal advocacy for the library within the institution is included in all position job descriptions with specificity as to roles and responsibilities and necessary competencies.
- Advocacy roles and responsibilities are evaluated in librarian and library worker evaluations.
- Goals statements, either departmental or individual, should include advocating for/

- positioning the library within the umbrella institution.
- The library's communication plan includes general goals for communicating the library's message of services and resources as well as its role within the umbrella institution for all librarians and library workers. In addition, meeting agendas should include opportunities for consistent discussions on advocacy initiatives.
- The library's marketing plan includes marketing, public relations, and publicity regarding internal messages and positioning of the library for librarians and library workers.
- Professional development plans provide education and training opportunities for internal advocacy competencies/skills sets areas for all library employees.
- The library's budget includes funding for internal advocacy for all librarians and library workers.

Taking their current roles and responsibilities, managers, librarians, and library workers should prepare specific *scenarios* for positioning themselves within their roles and responsibilities in the institution for influencing through personal contact and internal advocacy.

### **When subject bibliographers communicate to the subject/disciplines faculty**

Victor scheduled his usual appointments, e-mails, and blog postings for the history department and task force to discuss new subscriptions and purchases of materials for the coming school year and to provide training for new full-time and adjunct faculty for history collection development for the coming academic year. This year, however, his personal goals included outreach to faculty advocating for a 10 percent increase in the library's overall budget to match the institution's 10 percent increase in students over the past three years. To begin this discussion and to educate and engage the history faculty, Victor pulled the data from the growing number of history students/classes, the increased cost of books and subscriptions, and the increased use of history resources. He revised his collection development letter and training materials to include the increased number of students (specifically in history) and the library's request for a 10 percent increase, and added a blog posting to point history faculty to the article on the library's increased budget request that had been placed in the student newspaper. He invited faculty to post their history needs and support for library increases to the faculty blog.

### **When circulation desk library workers assist students with checking out materials and laptops**

At the biweekly circulation desk meeting, the head of circulation included library worker/customer scripts on the agenda and led the discussion on where (in the customer scripts) library workers could insert the need for updated technology for checkout to customers. Appropriate comments to be inserted were discussed by staff, and they felt comfortable responding to complaints about older laptops by asking for student support to increase the library's budget for technology, asking customers to complete suggestion forms if they felt the computers should be upgraded, and pointing out the student government's goals for advocating for a student technology fee for the library.

### **When librarians are delivering information literacy in the classroom**

The reference librarian's task force/department reviewed the library's information literacy campaign for the coming year. The librarians discussed classroom visits for integrated instruction and decided for the upcoming academic budget year that they wanted to include an atypical, albeit brief, mention of "other," more general library services—specifically, checkout of technology with the goals, through advocacy, of increasing student/customer interest in and use of existing resources and garnering interest in the library Web site's online suggestion box and the in-library suggestion box. Follow-up to these activities is a workshop offered to student government officers and members where library services are outlined and needs addressed.

### **When librarians and library workers serve on college committees**

Library managers designed an inventory of librarian and library worker service on committees in the institution. Committee members are asked to bring committee goals and workgroup plans for the upcoming year. All committee members are scheduled to meet with library administration to determine how committees/workgroups might offer opportunities to get the work out about increased costs of library materials, increased enrollments with no increase in materials in three years, and the need for upgrading technology.

### **When middle managers discuss/design goals for the year for the management team**

Middle managers meet to discuss their goals for the coming year and decide to create a goal for updating and designing a database of data to support advocacy initiatives for librarians and library workers that include: library support for student learning outcomes from the survey data from last year; usage statistics of online resources; and match of library resources to general education requirements. They also design an agenda for the first all-library staff meeting of the fall term to cover training on “advocating from the front lines,” where they will unveil public service desk scripts and messages, data-driven advocacy content and communication, and presentation skills training.



## Establishing the Message

### The Academic Library Agenda and the Imperative to Advance the Academic Library Agenda

The messages of the academic library are as varied as academic institutions themselves. Most librarians would likely agree that the basic messages articulated in ACRL's *Toolkit for Academic and Research Libraries* are the key messages and include:

- College and research libraries are an essential part of the learning community.
- College and research libraries connect you with a world of knowledge.
- College and research libraries are investing in the future while preserving the past.

However, the reality is that within institutions the academic library agenda (vision, mission, goals, outcomes, roles, etc.) vary dramatically and often. In addition, multiple messages may be delivered to multiple target audiences. Given these issues, therefore, what should take place is:

- The exploration of academic library messages
- The design of profiles of target groups
- The identification of frontline individuals to deliver messages
- The design of processes to deliver messages including “how to,” “getting permission,” “assessing success”

### The Exploration of Academic Library Messages

Institutions should begin with their umbrella institution's overarching statements such as the vision statement, the mission statements, goals, etc., then their own vision, mission statement, goals, etc., and, in addition, statements from partnership institutions and organizations. Moreover, a review of the education and nonprofit world should take place to assess issues relevant to academic library messages. This general content assessment or “scan” for message elements should take place systematically and consistently, using environmental scanning. These categories to review or scan might include:

- *Higher education*: What is the educational product? How is it competitive? Who are partners to higher education, including nonprofit/service and profit/business partners? Who are traditional/nontraditional customers? How do alumni figure in to the life of the institution/how might they be reached? What is the image of the organization and/or the educational product?
- *Technology*: Funding; institutional consistency; keeping up/keeping current/striving for cutting edge; integrating technology into the institution and instruction
- *Guidelines/regulations*: Keeping up/integrating changing/new federal, state legislative content (FERPA, funding/taxing, ADA, HIPA, grant opportunities)
- *Change/management*: Managing educational change and change in general; redesigning organizations to meet needs of diverse employees/faculty in more/diverse locations; commitment to communication diversity of medium and consistency of message; human resources issues, including leadership and/or management skills
- *Professional development/training/continuing education*: Balancing traditional content needs against current issues; funding; delivery of content
- *Performance evaluation/assessment*: New measures (outcomes, accountability) for federal, state, local assessment; employee performance
- *Funding*: Alternative revenue streams; maximizing resources and services; funding models for hybrid offerings, partnerships, etc.
- *Competition*: Distance/distributed learning; proprietary environments

Assessing these statements, categories, and areas should take place to determine the following:

- What major directions are articulated in the educational environment?
- How might the library play a role in these directions, and what type of role (primary, secondary, supporting, integral, reactive, proactive, short term, long term)?

- Does the message needed match a current direction/message of the library? If yes, how might the library articulate its support of direction with a current message?
- If no, how might the library articulate a support for the direction with a new message?

#### Message Examples

- Libraries are major players in the design of economic and efficient business models in support of new educational initiatives such as hybrid classes, community-based partnerships, and support for distributed learning.
- Funding for cutting edge library resources and services must keep pace with student enrollment.
- Librarians are educational partners in the delivery of instruction.
- Growth of the number of library workers has not kept pace with the growth of classroom faculty, student enrollments, and support services customers. When looked at within the context of the growth of staff-supporting disciplines, libraries have not kept pace and have hired 33 percent fewer staff than other institutional services.
- Library instruction/information literacy outcomes are designed to assist in gathering critical, required data for the institution's student learning outcomes.
- Academic libraries—resources, services, and personnel—are vital economic partners in the institution's community partnerships.
- Libraries support workforce curriculum by delivering the resources critical to accreditation standards and guidelines.

### Message “Build-outs”

#### Example

*Issue behind message:* State requires student learning outcomes for instruction. Departments/disciplines are changing their curriculum objectives to learning outcomes. The library is revising its information literacy program using ACRL standards. Libraries need to position themselves as partners in preparing state outcomes documents.

*What is the message?* Library instruction/information literacy outcomes are designed to assist in gathering critical, required data for the institution's student learning outcomes.

*Key points:* New state outcomes are required. ACRL standards have valid outcomes. The library's information literacy program is integrated into both general education and workforce programs

*We need our target audience to:* Partner with us to design information literacy curriculum integrated outcomes; recognize our role/value in the state reporting process

*Action needed:* Information literacy team needs to contact discipline-specific faculty/information literacy partners with relevant learning outcomes. Library managers need to review state reporting documents to see where library outcomes contribute. Librarians need to present to the faculty senate. Library representative needs to present to the curriculum committee. Library administration needs to take the results from the review of the state reporting document and submit a formal memo/alert to institutional administration/office of “institutional effectiveness.”

*Who is delivering the message?* Information literacy team: leaders, librarians, managers, library administrators

*What is the best delivery method?* Presentations (ppt, handouts) with data required from the state reporting document; completed library outcomes matched to disciplines in the format of the state reporting document

*What is the message time line? Frequency?* State reporting document due by end of fiscal academic year, but faculty don't meet after July 1; library research and presentations need to be no later than April 15<sup>th</sup>; state reporting data, in format, need to be delivered no later than June 15<sup>th</sup>.



## Message “Build-outs”

Example (continued)

*This is important to target groups because:* Curriculum outcomes matched to student learning are now required. Rumor is that not all classroom objectives are available for first reporting year/library outcomes are enhancement of data.

*Follow-up?* Contacting office of institutional effectiveness one month before the due date; review of success of this year’s information literacy outcomes by August 1 for working with curriculum faculty for next year’s outcomes design

*Measuring success:* If library outcomes are included in state-reported documents; if administration/relevant offices are aware of use and value of library outcomes

## The Design of Profiles of Target Groups

Although libraries typically have target groups they identify, serve, work with, relate to, and market to, additional target groups are often identified when messages need to be delivered. Common target groups include trustees, friends, administrators, staff, faculty, students, and internal and external partners. In addition, groups can be identified to reflect more different or more narrowly defined groups such as distance/distributed learning students, distance/distributed learning faculty, first-generation students, first-year students, student government, early adopters/faculty, frontline/public service staff, discipline-specific faculty, faculty senate/senate officers, governmental relations staff, public information/public relations employees, etc.

Target audiences are identified by asking and answering questions, such as:

- WHO is the target audience?
- WHERE is the target audience? Are they a newly identified group or a previously identified/contacted group? Contacted by the library? Contacted by other groups?
- WHAT are the benefits of approaching/working with this target group? What can this group do for the library?

Connecting target groups and messages includes asking and answering the following questions:

- WHAT is the message that matches the target audience?
- HOW can you ensure the message reaches this target audience? What is/are the best communication method(s) for conveying the message to the target audience? Why is this the best strategy for this target group?
- WHEN are target group message delivery time

lines? Are there frequency issues? Should the message be delivered once? Twice?

- WHAT are the funding issues of delivering the message? HOW much will be cost?
- HOW will you evaluate if the message is delivered successfully to the target group?

## The Identification of Frontline Individuals to Deliver Messages

Identifying frontline individuals is a critical part of the success of delivering messages. It is important, however, to identify the individuals and then the degree to which they will be involved in creating a team with varying responsibilities and roles. Managers should complete a process to determine whose job/role it is and where the responsibilities need to be articulated, such as job descriptions and job evaluations.

Sample Process

1. Managers meet to discuss messages, delivery methods, time lines, avenues, and venues currently available (such as committee/group roles/responsibilities).
2. Managers identify employee groups, positions responsibilities that are particularly relevant to this process (such as public service circulation and reference, committee appointments, regularly scheduled visits to departments/disciplines).
3. Managers outline/match messages to venues/delivery methods.
4. Managers discuss levels and types of participation, including elements such as:
  - a. At circulation/public service desk all employees use the script/dialog at checkout.
  - b. Librarians present at information literacy presentations, but not reference,

5. Managers bring employees from affected areas together for input on process and delivery.
6. Groups meet/flesh out process/product. (See “message build-out” example.)
7. Groups deliver.
8. Groups meet/assess success (based on outcomes/success factors outlined in “build-out”).

## The Design of Processes: “Getting Permission”

Although the expectation is that all managers and employees are on board with the processes, the reality is that not everyone can be involved in the discussion and design and delivery. In addition, for those on the front lines, it is also hopeful that not all messages come “from the top” and that employees, when used to the involvement of as many employees as possible, will come forward with their own ideas for individual or group message delivery. If a message comes “from the front lines,” employees should:

1. Share their ideas with their managers (or with designated message process owners such as marketing/pr, a “message” committee, etc.)
2. Complete the message build-out form
3. Submit the form in a timely manner (a period of time before delivery to allow time for approvals/any training necessary)
4. When approved, organize/register for training, as needed
5. Deliver

6. Assess/report back to managers (or with designated message process owners such as marketing/pr, a “message” committee, etc.)

Finally, messages come from everywhere and can include: “the library is a partner in the scholarly business of the institution” and “librarians offer the institution’s primary instruction in technology required by the state’s general education standards,” to name but a few areas. For additional substantive and critical information to assist in crafting the academic library’s message, the following toolkits should be used:

Association of College and Research Libraries.

*Scholarly Communication Toolkit*. Chicago: ALA, 2003, 2006. <http://www.ala.org/ala/acrl/acrlissues/scholarlycomm/scholarlycommunicationtoolkit/toolkit.htm>. Accessed 3 March 2006.

Association of College and Research Libraries. *@your library Toolkit for Academic and Research Libraries*. Chicago: ALA, 2003. <http://www.ala.org/ala/pio/campaign/academicresearch/academicresearch.htm>. Accessed 2 March 2006.

Office for Intellectual Freedom. *Privacy Toolkit*. Chicago: ALA, 2005. <http://www.ala.org/ala/oif/iftoolkits/toolkitsprivacy/privacy.htm>. Accessed 28 February 2006.

Office for Intellectual Freedom; Public Information Office; and the Washington Office. *Libraries and the Internet*. Chicago: ALA, 2003. <http://www.ala.org/ala/oif/iftoolkits/litoolkit/Default2338.htm>. Accessed 27 February 2006.



# Persuasion

## Definitions and Techniques

Exerting power/personal influence at work to advance the library's agenda from the front lines includes persuading others to your point of view. The goals for persuading others includes, before or when decisions are being made:

- Getting individuals'/groups' attention and then getting them to *listen* to us
- Getting individuals/groups to think about things we want them to think about/consider in a positive way
- Getting individuals/groups to support part/all of our needs/requests
- Getting individuals/groups to carry our message to others
- Getting individuals/groups to carry forward our specific needs to others

## So, What Is Persuasion?

Persuasion, considered to be both an art *and* a science, is the process of moving others by argument to a position or course of action either temporarily or permanently. A topic of research for many years, the study of persuasion includes:

- What the unique aspects or techniques of persuasion ARE
- Ways to increase the likelihood of someone saying yes to requests when they are asked
- Ways to get someone to not only say yes, but also say yes AND change their attitude to our request
- Ways to get others to say yes and change their perceptions
- Ways to get others to say yes and change their behavior

Although the goal of any toolkit is to give users techniques to implement immediately, this toolkit strives to give you a wide variety of tips for persuading others and SIX specific techniques and how to use these six techniques in an academic library setting.

Persuasion is considered to be the most viable/possible approach when a number of elements are present. These elements include:

- The most successful messages delivered are those that convince others of a need and then support presentation and discussion of the need with data.
- If two messages must be delivered, one desirable and one not or less than desirable, the more desirable message should be presented first.
- Message presentations should include repetition of the need and supporting data for the best learning and anticipated success and acceptance.
- Presenters should stress similarities rather than differences of those involved in discussions/ those you are trying to persuade.
- Both sides of the issue should be presented in discussions and during the presentation of pros and cons, the communicator's favored viewpoint should be presented last as listeners (typically not familiar with an argument) remember the end better than the beginning or the middle.
- Closure or summary statements and conclusions should be stated explicitly.
- Presenters should stress the desirability of the argument to all groups involved.
- Messages that require the greatest amount of opinion change are likely to produce the most change.

*~Carl I. Houland*

Six major principles of persuasion, based on Robert Cialdini's research, offer those building messages and persuasion principles and techniques significant approaches to influencing others from the front lines. These six basic principles include:

1. Principle of Reciprocation
2. Principle of Scarcity
3. Principle of Authority
4. Principle of Consistency
5. Principle of Consensus
6. Principle of Liking

## 1. Principle of Reciprocation

Societies are based on this concept: I am obligated to give back to you the form of behavior that you gave to me. If you gave me a favor, I owe you a favor. In the context of obligation people say YES to those they owe.

It works because groups that play by the rules of reciprocal exchange gain a competitive advantage. Members of a group can call on other members of the group because when they send resources, they aren't sending them "away." What you "give" is a credit.

Individuals need to master the art of "exchange." WHY? It sets the tone for partnerships to be formed.

- When in a situation one should always first ask the question not "what can you do for me" (that comes later) but "what can I do for you that will prepare the environment/situation for future exchange?"
- In this process, the message and language and dialogue are important.
- When people say thank you for what you've given them, don't say "don't think anything of it" or "YOU owe me one now!"
- When people say "thank you," say, "I know that if the situation were reversed, you'd do the same for me."

AND if you have two options to present to someone, do you first present the more costly or the less costly?

In the reciprocation process (reciprocation of concessions), start out with the larger favor AND relate it to concessions. Ask, "If you can't do that (the bigger or first favor), will you do this?"

Use this honestly. Ask for the larger first and have other things you want "waiting in the wings."

THIS is an individual's moment of power. After someone says no to you, don't retreat....don't wait... ask immediately for the second, typically lesser thing you want.

## 2. Principle of Scarcity

Scarcity of commodities is a major persuasion factor for people. Research shows that the merits of something don't matter as much as context: **people want what they can't have.**

How do you use the principle of scarcity to persuade?

- When you present an idea, explain what it is they will get from you (or what you offer) that they can't get anywhere else.
- Present, in your arguments/persuasion, the bundle of advantages they will get if they "move in your direction."
- Data show that it is not enough to say what people will gain, people are more motivated by what they will lose. SO we explain the unique benefits they stand to lose if they don't "go your way."
- Many people avoid this because they think they are threatening others, but if individuals use neutral language in using the principle of scarcity, this message is easier to deliver.

Example: People have had access to something, now they won't... Rather than IF YOU DON'T think/vote my way, this is what will happen to you/your constituents...etc.

AND

Scarcity works even better when you add the concept of "exclusive information."

When you get a new piece of information/unpublished report available, if it supports what you want to argue, give it to the select people as soon as you can.

SO

Do you tell those people you are talking to/trying to persuade what they can gain or what they stand to lose if they don't support you? Tell them what they will lose and give them unique information to make your case and to help persuade them.

## 3. Principle of Authority

If an expert says it, it must be true. Everyone's perception is that the most powerful have knowledge and trustworthiness.

SO we want them to realize your knowledge and we need to establish your trustworthiness and we want to present your idea as a credible one, one they can trust, and then convince them it's the best for them.

SO, before you present your strongest arguments as to why you are trying to persuade others, raise your weakness first and then present your strongest points that are designed to outweigh/overwhelm the weaknesses. This establishes you (or your idea) first as

trustworthy or credible (you told us your weakness or the weakness of the idea first), then as an expert (or why the idea is so good).

#### 4. Principle of Consistency

##### *Consistency and commitment*

We want to persuade people to say yes to our message AND to identify if they have said yes to us in the past AND we want them to continue to support us by telling us verbally and to put their commitment to us in writing.

Persuading people to say yes is not just the nod and smile; our goal is to include public commitment and, if we can, written commitment.

##### *Language that works is...*

Rather than say “we hope you will,” you should say:

- “Would you please?” or
- “When can you?” or
- “Can we count on your to...?”

#### 5. Principle of Consensus

One technique for persuading others is to try to get consensus or everyone agreeing that your message is best. You want those you are trying to persuade to think “a lot of other people are doing this or saying yes; therefore, it must be the right thing to do.”

In order for consensus to occur, or in order for others to be persuaded, people have to identify with or relate to or understand the “other people” you are speaking of. Bringing in general names and general categories, such as “all faculty” or “deans agree,” doesn’t work as well as saying similar or specific people (like them) who are “signing on” to your idea/request/saying yes. Examples of more specific groups could include:

- All English faculty in integrated instruction

- The counselors working in the highschool to college program
- Members of the college’s accreditation committee
- The last six colleges who have gone through accreditation under the new standards

#### 6. Principle of Liking

People can be persuaded and people like to say yes when:

- They are aware that others who are involved in the message are those whom they like and who are like them.
- They are complimented and thanked for supporting the message.
- They feel they are part of the whole that is working together for success.

#### Do the Principles of Persuasion Work the Same across Cultures?

Persuasion researchers such as Cialdini state that the principles work the same basically, but what works *best* is weighted differently among cultures.

Examples of how different cultures and groups respond differently include:

- In the United States, people are best persuaded with **RECIPROCATION**. Has this person done me a favor lately?
- In Asian countries, people are best persuaded if the requestor has **AUTHORITY** and is connected to senior members of their small group?
- In Spain/Latin countries, people are best persuaded because of **LIKING**. Is this connected to my friends?
- In Germany, people are best persuaded if the request is **CONSISTENT** with the rules and regulations of the organization.

## Library persuasion

How do these principles work in libraries?

1. RECIPROCATION	How might we use this?
<p>Societies are based on the concept: "I am obligated to give back to you the form of behavior that you gave to me. If you gave me a favor, I owe you a favor." In the context of obligation, people say yes to those they owe.</p> <p>It works because groups that play by the rules of reciprocal exchange gain a competitive advantage. Members of a group can call on other members of the group because when they send resources, they aren't sending them "away." What you "give" is a credit.</p> <p>We need to master the art of "exchange." WHY? It sets the tone for partnerships to be formed.</p> <p><i>Arguments for persuasion and reciprocity should have multiple opportunities for success, that is, those persuading should be ready with alternative requests if the first request is not possible.</i></p>	<p>Our libraries provide specific curriculum support for your students.</p> <p>Library resources support your discipline's accreditation requirements by providing...</p> <p>Our librarians support new faculty in these ways...</p> <p>Library resources provided the critical information for a successful grant application by...</p> <p>The library gathered outcomes data for required general education requirements in three areas, including...</p> <p><i>We need x dollars for xxx this coming academic year for full compliance. A second scenario provides fewer benefits but meets basic requirements and includes... It is a lesser amount but we could – if necessary provide reduced services.</i></p>

2. SCARCITY	How might we do this?
<p>Scarcity of commodities is a major persuasion factor for people. Research shows that the merits of something don't matter as much as context: people want what they can't have.</p> <p>How do you use this to persuade?</p> <ul style="list-style-type: none"> <li>• When you present an idea, explain what it is they will get that they can't get anywhere else.</li> <li>• Tell them the bundle of advantages they will get if they move in your direction.</li> <li>• Data show it is not enough to say what people will gain, people more motivated by what they will lose, SO we explain the unique benefits they stand to lose if they don't "go your way."</li> </ul>	<p>Don't only tell them what their area will gain if they fund us, tell them specifically what they will lose and be specific.</p> <p>If the library doesn't get the full operating request, we will...</p> <p>...lose these resources (be specific)...</p> <p>....lose access to the following...</p> <p>and not just "they" will lose but targeted information as to what their specific constituents will lose, such as...</p> <p>....the x department will lose...</p> <p>....the students enrolled in .... will no longer be able to...</p>

2. SCARCITY (continued)	How might we do this?
<ul style="list-style-type: none"> <li>Many people avoid this because they think they are threatening others but use language that is neutral.</li> </ul> <p>Example: People have had access to something, now they won't. Rather than IF YOU DON'T think/vote my way, this is what will happen to you/your constituents....etc.</p> <p>AND</p> <p><i>Scarcity works even better when you add the concept of "exclusive information."</i></p> <p><i>When you get a new piece of information/ unpublished report available, if it supports what you want to argue, give it to the select people as soon as you can.</i></p>	<p>Support persuasive arguments with data such as outcomes, strategic plans, accreditation documents ... tailored specifically to their area of study/expertise.</p> <p><i>Give them data that "only they have" or create unique data just for them...a report that provides them with specialized information just for their discipline or department.</i></p>

3. Principle of Authority	How might we do this?
<p>If an expert says it, it must be true. Everyone's perception is that the most powerful have knowledge and trustworthiness.</p> <p>SO we want them to realize your knowledge and we need to establish your trustworthiness and we want to present your idea as a credible one, one they can trust, and then convince them it's the best for them.</p> <p>SO before you present your strongest arguments as to why you are trying to persuade others, raise your weakness first and tell them that your strongest points outweigh/overwhelm the weaknesses.</p> <ul style="list-style-type: none"> <li>If you and your ideas have strengths and weaknesses, present the weaknesses FIRST and your strengths SECOND. This establishes you (or your idea) first as trustworthy or credible (you told us your weakness or the weakness of the idea first), then as an expert (or why the idea is so good.)</li> </ul>	<p>When delivering or asking for support/ persuading others to support your message, validate the credentials of your services and the credentials or expertise of the people presenting or attempting to persuade.</p> <p>If your expectation is that those whom you are trying to persuade are best persuaded by the principle of authority, match the presenter based on their credentials or expertise.</p> <p>This principle also works by sending individuals to persuade those who have served on the same committees and/or those who have had similar successes.</p> <p>Messages should be validated during the process of persuasion by separating the argument with the weaknesses first and the strengths second, such as:</p> <ul style="list-style-type: none"> <li>The library is requesting additional money to support expanded hours, but the hours won't meet all the needs of the discipline-specific faculty with the existing staff. During the persuasion arguments, those presenting should begin by stating what/who the hours won't serve first, then close by highlighting what the library will be able to achieve and for whom with the additional funding.</li> </ul>

4. Principle of Consistency	How might we do this?
<p>Consistency and commitment</p> <ul style="list-style-type: none"> <li>We want to get people to say yes to us and</li> <li>to identify if they have done it in the past and</li> <li>we want them to continue to support us by telling us verbally</li> <li>and commitment in writing to telling us they will do it.</li> </ul> <p>Getting people to say yes is not just the nod and smile; our goal is to include public commitment and, if we can, written commitment. Language that works is...</p> <p>Rather than say, we hope you will</p> <p>SAY</p> <p>would you please?</p> <p>or when can you?</p>	<p>Persuasive arguments for libraries and library workers for consistency include:</p> <p>Choosing frequent supporters of the library to carry the message.</p> <p>Asking them specifically:</p> <p>We need to take our message to the task force and ask them to send e-mails ...or vote for library services requests in the master planning process... or we need your vote when technology initiatives are placed in front of the tech committee.</p> <ul style="list-style-type: none"> <li>Can we count on you to vote for us?</li> <li>Will you send an e-mail to you colleagues in support of us?</li> <li>Will you be featured as a supporting faculty member when we put endorsements on our Web site?</li> </ul> <p>Will you “testify” for us before the board by talking about your project and how library e-resources made it possible to do your project remotely?</p>

5. Principle of Consensus	How might we do this?
<p>“A lot of other people are doing it; therefore, it must be the right thing.”</p> <ul style="list-style-type: none"> <li>People have to identify with or relate to or understand the “other people” you are speaking of.</li> <li>Bringing in general names and general categories doesn’t work as well as saying people like them who are “signing on” to your idea/request/saying yes.</li> </ul>	<ul style="list-style-type: none"> <li>All the English faculty with integrated instruction are supporting us in our request and are linking our Web page to their departmental Web pages. We would like the history faculty to link their pages as well. Can you speak to the history task force to request they support us?</li> <li>The tutors at the main campuses are attending our training to better assist their students in identifying appropriate research. They are also linking their Web sites to ours. Can you send an e-mail to your tutors requesting they attend training and link their pages to our resources?</li> <li>In reviewing the last six colleges accredited in this workforce area, they all worked with their libraries to design Web pages to match student outcomes to library resources. We need you to identify someone from workforce to work with us to design outcomes Web pages. Can you identify someone before the next workforce taskforce meeting?</li> </ul>



6. Principle of Liking	How might we do this?
<p>People like to say yes or people can be persuaded when:</p> <ul style="list-style-type: none"> <li>• They are aware that others are involved whom they like and who are like them.</li> <li>• They are complimented and thanked for doing a good job.</li> <li>• They feel part of the whole that is working together for success.</li> </ul>	<ul style="list-style-type: none"> <li>• You have been chosen to carry this message because you have been so supportive of the library in the past and we are such admirers of your work on the Library Advisory Committee.</li> <li>• We would like to feature your library support on the Web site, thanking you for your letter of endorsement.</li> <li>• Please accept our invitation to speak to the library staff on the role/value of the library in the curriculum process.</li> <li>• We are presenting this workshop to provide unique training to thank the student government officers who have supported us during the year in our quest for a technology fee. We would like to provide a basis for an ongoing dialog with student groups to continue the discussion for next year's fee debate.</li> <li>• We appreciate students using our libraries, and we like to support students in their need for print materials, online resources, and training in the use of materials and resources. We're glad you appreciate the laptop checkouts program. Do us a favor and complete this suggestion card or fill out our online suggestion card.</li> </ul>



## Best Practices/Lessons Learned

Although this toolkit offers practical how-to advice on persuading and influencing within institutions, the real strengths of a dynamic document are the lessons learned. It is hoped that, post workshops and use of the toolkit, frontline librarians and library workers will share stories and techniques that worked for them.

What makes a best practice?

1. Organizations identify areas of “need,” including areas such as choosing frontline employees, integrating processes into institutional resources, establishing messages, and/or persuading others as to the chosen message(s).
2. Organizations assess the levels of and types of need.
3. Design of the use of the toolkit area is completed and recorded.
4. The content of the library’s use of the toolkit is reviewed to extract confidential information and generalized to be applicable to other organizations.
5. Content added includes: Lessons learned, strengths, weaknesses, opportunities, and threats given design and delivery/choice of persuasion technique chosen.
6. Content added includes: Recommendations for changing the process or criteria that need to be in place in order for things to work, such as size of institution, centralized versus decentralized, etc.
7. Content is submitted to ACRL toolkit contact information.
8. Content is formatted and added to the Best Practices toolkit section to be shared with other toolkit users.



# Appendix I

## Gathering Data to Support Messages/Training Content

Environmental scans assist in training frontline librarians and library workers in crafting messages and providing data and supporting documentation.

## The 21st-century Higher Education Environment

Higher education today includes the classic halls of ivy, the research ivory tower academy, the thirty thousand seat filled public university institution, the bustling urban high-rise four-year diploma environment, the private alternative educational four-year retreat, and the wide variety of community college environments that house more than 60 percent (and growing) of the country's freshman and sophomore population. What do all these diverse educational opportunities have in common? They are all moving...some slowly...some hurtling...toward the future of education. They are characterized by some, if not all, of the trends below.

1. Student enrollments are growing to surpass the capacity of traditional infrastructures (community colleges at a higher rate).
2. Profiles of learners and teachers are changing.
3. Clients and potential clients are shopping for education.
4. Higher education (all employee levels) roles, motivation, and training needs are shifting.
5. Program costs, workload, compensation, and instructional issues deter some from shifting from more traditional instructional programs to 21st-century instructional models
6. Many higher education structures are changing to focus on design and implementation of programs and processes of “academic accountability, competency outcomes, outsourcing, content standardizing, and adaptation to learner-consumer demands.”
7. The Internet and info tech devices are becoming more widespread in higher education/teaching and learning. Curriculum, both traditional and newer content, is being delivered in technological structures in either all or part of classes.
8. Performance expectations for students include proficiency in computer literacy, and now computer literacy is accompanied by proficiency expectations for technological awareness and technological fluency.
9. Funding challenges are increasing with critical, ongoing expensive investments needed and fewer resources to meet demands. These challenges force many to move to commercial products and/or consortial programs and/or offerings rather than investing in in-depth, substantive, and permanent changes in institutions.
10. Distributed learning opportunities (distance, hybrid) are increasing the need for “effective course-management systems and teaching strategies that utilize technology.”
11. Although higher education customer profiles are changing, customers still need extensive support for both technology-driven (hardware, software, and courseware) and campus (more traditional) educational opportunities such as advising, testing, counseling, library, and student life. The student is seen as consumer, and there is a need for increased accessibility for those with special needs.
12. Knowledge and information are growing rapidly and information doubles every four years. This growth in information dramatically impacts higher education and learning in general as hardware, software, textbooks, monographs, periodicals, and intellectual content must now be reviewed continuously for accuracy in content and matched to delivery. As content grows, there is a move to standardize content in reusable learning objects to be organized and stored in databases for use in the creation of “customized learning experiences for specific needs.”
13. For-profit educational institutions are the fastest-growing sector in higher education.
14. Academic accountability is paramount and accreditation and program approval is now—and will continue to be—based on educational outcomes. Testing programs to assess outcomes and provide accountability are growing in number at both the local and national level.

15. “Academic emphasis is shifting from course completion to competency” with “outcomes-based” or “employer-based” competency a critical need for course completors or graduates. In many cases, “certification is becoming more preferable than a degree,” “integrating applied or on-the-job experience into academic programs” as a critical characteristic” of higher education.
16. Education is becoming more seamless between/among high school, college, and further studies. “Home school movement leads to a home-college movement.” Higher educational environments are blurring... specifically two- to four-year environments.
17. Successful marketing of education and the educational product is critical to the success of nonprofit higher education.
18. Higher education is looking outside standard operating procedures and processes for outsourcing opportunities and partnerships with other colleges, universities, companies, and other kinds of institutions to share technology and to produce and deliver courses.

### **The 21st-century Higher Education Environment: Technology/Distance Learning Trends**

Almost every higher education trend analysis focuses on technology and on distance learning. Some “givens” when looking at these trends include: retention issues, rampant costs for continually changing hardware and software, no clear management models, uneven support for distributed learning students, unclear measurement and accountability, problems with accreditation with course delivery, delivery of support resources, and faculty training and credentials.

1. By the end of 2005, the DL industry will be an \$11 billion dollar business; in 2000, it was a \$4.5 billion industry.
2. Educause survey data state that a major higher-end goal and the single most important IT issue confronting their campuses over the next two or three years is “helping faculty integrate technology into their instruction.”
3. Funding challenges are considered the top institutional technology (IT) concern for higher education.
4. Online learning was once thought to be an inexpensive way to increase revenue; however, recent analysis indicates that cost per student of a high-quality online learning program is the same as or greater than the per-student cost of physical school.
5. IT issues now include “faculty development, support, and training.”
6. Models of managing DL programs are diverse and vary from institution to institution. They include, but are not limited to, centralized design and delivery, centralized coordination of training and scheduling with discipline-specific design of curriculum, outsourced services, and consortial course availability.
7. DL programs are typically weak in student and curriculum support services.
8. More courses, degrees, and educational programs are becoming available through distance-education programs.
9. Distributed education will grow from “five percent of all higher education institutions in 1998 to 15 percent by 2002...if the pattern holds out, by 2010, distributed education will be 40%–50% or more of the educational environment.”
10. There is a huge growth in Internet usage. In 2003, Internet users are approximately 500 million worldwide and will almost double by 2005.
11. Technological fluency is now an outcome skill and a graduation requirement. (Gen Ed).
12. Many courses require some aspect of technology, and some institutions are now requiring students to take at least one online course before they leave college.
13. One-half of traditional campus programs will soon be available (alternatively or exclusively) online.
14. Whereas some institutions establish their own DL programs, others are contracting with virtual environments, establishing articulation agreements with virtual environments while others are “spinning off” new “virtual” or “online” universities.
15. “Universities offering distance education are often perceived as modern and [technologically] competent, thus creating a competitive advantage.”
16. As many as half the students in online courses are from the traditional 18- to 25-year-old student cohort who normally take campus-based courses.
17. The distinction between distance and local education is disappearing.
18. Data show that “most online students live in the local vicinity of the institution offering their course.” Educause
19. “Traditional in-state, out-of-state, and international student distinctions are being

eliminated, and the corresponding fee structures for the respective groups are breaking down.”

20. The need for effective course-management systems and Web services is growing.
21. “There is an increasing need for learning and teaching strategies that exploit the capabilities of technology.”
22. There is a critical need for research on teaching and learning and “new technologies such as wireless, mobile laptop computing, personal digital assistants (PDAs), videoconferencing, videostreaming, virtual reality, and gaming environments” and how they enhance distributed learning.
23. Pedagogical research indicates that applying traditional teaching strategies at a distance often causes frustration.
24. Early research indicates that DL classes “cost” more to teach because they take more time of a faculty member; hence, many DL classes are smaller and therefore less revenue generating.
25. When conventional classroom methods are used to teach at a distance, they tend to be more unsuccessful than successful.
26. The commercial section is stepping up with more education “brokers.”

## Faculty

- Faculty and staff roles are shifting or “unbundling” as instructional activities are given to a variety of professionals in the academy.
- There are now new/different levels and categories (many actual and many perceived) of faculty: tech versus nontech, classroom versus distance, hybrid, etc.
- Instructional teams now reach out beyond the classroom teaching team and include administrators, instructional designers, technologists, tutors, librarians, and instructors/facilitators of tech and nontech environments.
- Faculty members must be expert communicators with diverse methods of communication with the changing educational venues.
- There is a critical need for continuous faculty development, support, and training.
- Faculty tenure is being challenged, and there is concern for faculty performance when accountability and outcomes of curriculum are required. A recent Educause survey indicated that “maintaining traditional faculty roles

and tenure” was one of the least desirable characteristics of a twenty-first-century university.

- Some faculty members are resisting technology integrated into the curriculum as well as technological course delivery.
- Many administrators and faculty members do not understand that teaching in the new educational arena must include a rethinking of pedagogy to match students, content, and presentation.
- Faculty members demand reduced workload and increased compensation for revising and designing curriculum for coursework, such as distance courses.

## Students

- Today’s students are dramatically different in higher education environments today. They include the more typical 18- to 25-age-level students along with younger high school age students taking college level classes and the older adults entering or returning to college. Students take credit, noncredit classes, and continuing education classes packaged in yearlong, semester, four-week, eight-week, etc., classes, and classes in person or online and in person and online.
- Younger students/learners today differ from traditional college-age students in previous years. Specifically students:
  - Are practical, immediate (rather than long-term) problem solvers
  - Are autonomous and relevancy-oriented: They have a need to know the rationale for what they are learning.
  - Prefer doing to knowing, trial-and-error to logic, and typing to handwriting (no long manuals!)
  - Are motivated by accessibility, connectedness, advancement, and external expectations
  - Have seen rapid change in the past ten years (dog-year change)
  - Are more used to change and fast-paced activities
  - Have shorter attention spans
  - Need more “glitz” to both attract and keep their attention even for shorter periods of time
  - Blur lines between work and recreation and “life”
  - Enjoy gaming, games of risk, and “techtainment”

- View technology as status and are involved in positioning for status, control, and feel that those involved in technology are getting the rewards
- Many think they know more about technology than they really do
- Don't value/often aren't aware of tradition and traditional ways
- Have different work ethics
- Work differently/at different times
- Are learning on the "surface"
- Know contemporary (very current) factoids and often not facts/not historical ones
- Know popular culture and not culture
- Know more facts than content
- Are not truly "self-directed" but are not used to working with others or in teams, nor do they know how
- Need frame of reference more often than not (i.e., how does it relate to me/my job/my future?)
- Are trying to "multitask" and balance multiple work environments and family responsibilities
- Want variety in learning opportunities; their learning styles are exacerbated by contemporary society
- Many courses in general and especially technology-driven or delivered curriculum offerings are not accounting for diverse technology awareness and basic computer skills skill sets
- Still know less science and math
- Still can't write
- Still aren't aware of the importance of research
- Need continuous work on the development of their critical thinking skills and therefore need extensive problem-based education
- Still need LOTS of attention, assessment, and feedback
- Need more in-person learning structures
- Are self-directed but need reinforcement during the teaching and learning processes
- Are more "rule-followers" in learning
- Desire and follow instructions and use manuals
- Perceive themselves to be doers, using previous learning to achieve success as workers, parents, etc.
- Earn best when they perceive the outcomes of the learning process as valuable, contributing to their own development, work success, etc.
- Often have very different ideas about what is important to learn
- Are very different from each other. Adult learning groups are likely to be composed of persons of many different ages, backgrounds, education levels, etc.
- Perceive time itself differently than younger learners do, also are more concerned about the effective use of time
- Have a broad, rich experience base to which to relate new learning
- Learn more slowly than younger learners but learn just as well
- Are much more likely to reject or explain away new information that contradicts their beliefs
- Learn more directly linked to need, needs related to fulfilling their roles as workers, spouses, parents, etc., and coping with life changes (divorce, death of a loved one, retirement, etc.)
- Are more concerned about the immediate applicability of learning
- Are more often internally motivated (by the potential for feelings of worth, self-esteem, achievement, etc.)
- Have well-formed expectations, which, unfortunately, are sometimes negative because they are based on unpleasant past formal learning experiences

## Older Adult Students/Learners

Older adult students/learners, an ongoing growing population, may be second- or third-career learners, first-time learners, or be seeking certificates, formal education, or specific, targeted training or retraining; becoming more used to technology, but not as comfortable as younger learners

- Have longer-term goals
- Are motivated by income, need to retain, change employment
- Need more in-person social structures

## The 21st-century Academic Library

Academic libraries are playing a major role in this new higher educational environment by extending their reach and "designing new reaches" through strategic partnerships, collaborative relationships and mutually beneficial alliances, and creative ventures. These activities update/change their image, share their expertise, and promote their services. In order to successfully partner, many libraries are assessing older mission and goals statements and designing broader vision, mission, and goals to match the changing institutional vision and to play a leadership role. Twenty-first-century changes in higher education environments

are forcing librarians to rethink their vision and mission and institutional role, restructure their image or “re-brand” themselves, reposition themselves within higher education environment, and redistribute some expertise and energy into the broader community. Higher education libraries, among many other things, are:

- Expanding their roles of support for students, faculty, and staff and a role of assistance and support in partnerships and collaborations and in internal and external institutional enterprise activities
- Expanding their role, and the marketing of their role, in providing critical general

education, specialized instruction and workforce education, their service and expertise in research support, and their role as discipline/department liaisons

- Becoming increasingly involved in campuswide interdisciplinary programming and cross-departmental partnerships such as college orientation, career counseling
- Seeking techniques for expanding assessment and evaluation
- Trying to balance the traditional and the cutting edge

To better explain how we have changed and are continuing to change, it is best to view the library of today and tomorrow in a paradigm shift.

THEN	NOW
1. Most services available only when “open”	Many services available 24/7
2. Limited technology for individual use by public	Greatly expanded technology for individual patrons
3. Patrons have more easily identified needs and levels of learning and knowledge. Libraries could identify patterns and thus design services and resources to match patron needs.	Patrons have dramatically different needs and dramatically diverse levels of learning and knowledge, often hard to identify and change rapidly.
4. Patrons spend moderate time with print materials and indexes. Some reading and note-taking from materials and much copying.	Patrons spend expanded time on library hardware with little or no note-taking and massive printing or copying.
5. Offer library instruction in traditional ways such as general or specialized tours and one-on-one, little classroom training or education (in public)	Expanded offerings on top of traditional, such as distant or virtual, classroom instruction (grant-driven, patron driven); training is a massive need/can’t all be done one-on-one
6. Single or individual product and productivity workstations	One workstation or network stations that multitask or many single stations configured differently or badly networked
7. Changes in patron needs are assessed and occur at least annually	Patron needs change and must be assessed continuously
8. Changes/needs in library services hardware, software are addressed and occur once a year or every 18 months	Changes/needs occur anywhere from every month to every two to three months; ongoing reassessment is needed

THEN	NOW
9. Strong reliance (by public and staff) on print resources	Strong reliance on electronic and print (many patrons don't want print)
10. Most things available in print, mainly holdings catalogs or indexes available electronically	Catalogs, indexes available electronically and much full text now available electronically and some things now available <i>only</i> electronically
11. Traditional services available, such as copying	New services added <i>on top of old</i> services such as printing, downloading, basic computer skills such as keyboarding
12. Standard budget categories for buying, record keeping	Additional/expanded categories relating primarily to hardware and software resources
13. Planning qualitative and quantitative	Planning very data driven, emphasis on strategic
14. Planning for resources annual or biannual updates	Rapid change in products drives more frequent updating/greater expenditures
15. Limited technology for staff	Greatly expanded technology for staff
16. Not much time spent teaching the tool, rather locating and using content	Now <i>much</i> time spent teaching tool or method of finding, etc.
17. Reference in person	Reference all over the place: in person, on phone, over e-mail or bb's, virtual real time, virtual nonreal time
18. Offer only those things we purchase	Offer access to selective resources freely and available
19. Offer use/instruction for only those things we purchase	Now must instruct/teach for what we purchase/access/rent and then selective resources now "free"
20. Administrators/patrons had a moderate sense of what we "were" and what we offered.	Most nonlibrarians don't have a clue what we do, what's out there. Isn't everything free on the Internet?



THEN	NOW
21. Libraries bought/invested in resources/ asked for large sums of money less frequently than other areas.	Now ask for large sums of money, much equipment, technology replacement money, new systems and system support; ongoing requests for new and upgrade money.
22. Library a quiet place with individual seating for study	Noise! Equipment! One-on-one teaching of hardware/software, vying for seating and finding seats without computers at them! Patrons trying to use print materials and computers and finding no room next to computers.

## Librarians and Library Workers

Librarians must change as libraries change. Although librarians provide many more services (activities, resources) beyond reference, this chart refers primarily to the patron reference/information literacy interaction and related areas.

THEN	NOW
1. Librarians provided reference services and may have specialty areas.	Librarians now must provide a variety of kinds of reference AND specialize AND have many general areas in a wide variety of forms and formats.
2. Teaching or helping patrons use the library was point-of-use or in-person and some small group presentation primarily.	Teaching/helping patrons is now point-of-use, in-person, virtual, small group and large group in classroom in-person settings, for a wide variety of ages and levels and styles of learning. It can be both asynchronous and synchronous.
3. Librarians selected materials and created print material guides and handouts.	Librarians now select, make accessible (in numerous forms and formats) AND create print and online documents, guides, and resources to meet patrons needs.
4. Librarians and library professionals needed to possess and maintain more traditional technology competencies such as knowledge of productivity software and basic instructional design such as overheads.	Librarians and library professionals must maintain all traditional and also add 21 <sup>st</sup> -century toolbox for staff such as high-end productivity software (databases such as Access, spreadsheet, PowerPoint,) Web design ware (html, Java scripting, and other Web-based products).

<p>5. Librarians and library professional development and continuing education was typically more library related.</p>	<p>Librarians and library professionals now must more broadly address education and training in hardware, software, teaching and learning, and general management issues and technology issues such as hardware setup and maintenance and networking.</p>
<p>6. Continuing education has been delivered in more typical workshop setting and in traditional formats for learning.</p>	<p>Continuing education and development has been expanded into train the trainer, individual learners, resident experts, and additional formats such as Web based, teleconferences, etc.</p>
<p>7. Professional development and learning has been sporadic, periodic, and often issue or product specific.</p>	<p>Professional and learning and development is now continuous, ongoing, and now often more general.</p>
<p>8. Librarians and library professionals have worked on committees and groups on some projects with some decision making.</p>	<p>Librarians and library professionals now have more of a smaller team approach to general work functions with more team recommendations and decision making.</p>
<p>9. Staff members have been working together in person on projects and committees.</p>	<p>Staff members also now work together virtually.</p>
<p>10. Staff members are forced to share workspaces, hardware, and environments due to lack of money for adequate technology support.</p>	<p>Staff members now need their individual workstations (even though more workstations are networked) to be able to customize hardware and software to project, ergonomic, and intellectual needs.</p>
<p>11. Librarians and library staff are more reactive.</p>	<p>Librarians and library staff are—and must continue to be—proactive to showcase themselves and to identify and define competitors.</p>
<p>12. Librarians and library staff create PR for their services and activities.</p>	<p>Librarians and library staff must include themselves in marketing efforts.</p>
<p>13. Librarians and library staff justify needs with general goals and aggregate data.</p>	<p>Librarians and library staff justify with general and targeted goals and outcomes statements. Usage data must be designed to match goal statements.</p>

<p>14. Librarians and library staff used to keep a physical count, that is, a count of actual items in our collection "owned."</p>	<p>Librarians and library staff still count physical ownership but must now count access to information or collections not owned, but "subscribed" to. So it is an in-person or tangible count and then a virtual count.</p>
<p>15. Librarians and library staff used to only count use by in-person or door count and contact such as call-in.</p>	<p>Librarians and library staff now count in-person, call-in, and virtual usage both locally and remotely.</p>
<p>16. Librarians and library staff used to count reference questions as in-person or by phone.</p>	<p>Librarians and library staff now count in-person, call in, fax, e-mail, and Web based.</p>
<p>17. Librarians and library staff typically had few usage categories that seldom varied.</p>	<p>Librarians and library staff now have many more things to count as well as usage categories, such as searching an item, searching and finding, or a "hit."</p>
<p>18. Librarians and library staff used to have only aggregate or input stats, that is, how many did we buy? How many were checked out?</p>	<p>Librarians and library staff now still count how many purchased, but also use in general, types of use input and, in some cases, outcomes such as use of an online resource.</p>
<p>19. Counts or statistics typically were steady or growing, or they grew at the same pace.</p>	<p>Now there is a national decrease in some areas that we see locally and an increase in alternative uses/counts such as electronic resources, printing, use of interactive software, or tutorials.</p>



## Appendix II

### Frontline Librarian and Library Worker Training Content

#### Staying in Control of One-on-One Discussions and Postpresentation Questions

The best way to make sure your message is heard is for you to be in control. Your goal should be deliver your key message at least three times. Skilled spokespeople can take virtually any question, answer it, and “bridge” back to their key message in 25 words or less. The following techniques are particularly useful with those who ask the toughest questions and expect answers and those who might have their own agenda or different goals. The best way to feel in control is to practice these techniques whenever possible until they come naturally.

1. Ask questions before you answer them. Clarify in advance the topics to be discussed and the target group. Ask if there are specific questions the target group member wants answered. If you do not feel qualified to address the issue or are uncomfortable with the approach, say so. Suggest other approaches. Refer them to subject experts or designated experts or managers.
2. Take time to prepare. Use the time immediately before the visit to review the key message and anticipate questions.
3. Never answer a question you don't fully understand. Say, “I'm not sure I understand the question, are you asking...?”
4. Think before you answer. Don't rush. A pause can make you appear more thoughtful. You can also buy time by saying, “That's a good question” or, “Let me think about that and come back to it.”
5. Beware of leading questions. Some target group members may attempt to influence your answer by asking something like “Wouldn't you say...” followed by an idea for your agreement. Answer the questions briefly followed by your own statement.

Example:

Question: Why are you asking for money for extra print

resources? Isn't it true that many colleges are closing their library buildings in favor of online collections?

Answer: There's been some talk of that, but I don't think it's likely. Libraries are as much a part of campus life as the student union. One of the things educators are relearning is that teaching is still done best face-to-face. One of the most important things librarians do is teach students how to be critical consumers of information.

6. Never repeat a negative. Keep your answers positive.
7. Avoid one-word answers such as yes or no. Use every opportunity to make your point.
8. Focus those asking questions by “flagging” key thoughts with phrases such as “That's an *excellent* question” or “The *important* thing to remember is...” or “The *real* issue here is...”
9. Stay “on message.” Use every question as an opportunity to “bridge” to your message.

#### Preparing for Presentations/Speeches

1. Be prepared. Find out about your target group: who will be there, how many, any special interests or concerns about the library.
2. Personalize your message for a particular group. Prepare answers for possible questions, especially the ones you'd rather not answer, ahead of time.
3. Follow the golden rule of public speaking: Tell your target group what you are going to tell them, then tell them, and then, in your conclusion, tell them what you told them.
4. It's a good idea to have a written script (in large print) or notes to work from. It is not a good idea to read your remarks. The goal is to talk, not “speak.” Practice a conversational style of delivery that will allow you to look at your target group most of the time.
5. Have a clear message and call to action. Stick to the key points of the message. Tell them why your message is important to them and what it is exactly that you want them to do.
6. Tell stories, your own and others. Consider supporting data and “stories.”
7. Use visual aids when appropriate. Cartoons, newspaper clippings, and charts help tell the

story. Practice using videotapes, overhead transparencies, or PowerPoint Presentation beforehand. Arrive early to check equipment.

8. Let your enthusiasm show. That's what sells your message.
9. Keep your remarks about your message brief, about 20 minutes plus questions.
10. Thank the group for being good listeners, the opportunity to speak, and their support. Be specific and ask them to complete specific tasks to assist you in carrying out your message.

## Frontline Librarian and Library Group Communication Questions

When acting as a frontline group and while putting together your team of advocates, individuals and group/team members should ask themselves the following questions:

1. How do individuals or group members communicate formally?
2. What are individual communication styles?
3. How do they communicate when individuals are in a group?
4. Do individuals act one way typically but need to change their style when communicating the message for the library?
5. Are there preferred ways to communicate with specific target groups? What communication styles get target group member attention?

## Talking the Talk: Communicating with Your Target Groups

In determining when and how to talk, however, the two most important things are the *match* of the message to

the event/group/person/event or activity and the focus on the *personal* contact for influence and persuasion.

What general words/phrases do your target group members need to hear and recognize? What are the current hot topics? What might you hear?

- Specific phrases from the chosen message
- Supporting data for message elements
- Positive, neutral language

What should you avoid?

- Red flag words and phrases
- Trendy terms that can't be supported by data/facts
- An excess of qualitative words
- An excess of quantitative words

Specifically don't over promise, don't under promise, don't promise! Avoid:

- Terms such as cost savings without proof that decisions save money
- Answering the question "If you want this money, where should we get it/who should we take it away from?"
- Answering the question "How will we pay for xxx if we give you this money?"
- Promises such as "this is our last request..."
- Statements such as "All we need is..."
- Characterization of your library or services and activities as "all new" or "completely new," which might indicate that you aren't achieving a balance. Always stress that you are striving to achieve a balance of resources and services in order to serve all target groups.



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Toolkit written by Julie Todaro, member of the Grassroots Advocacy Toolkit Task Force

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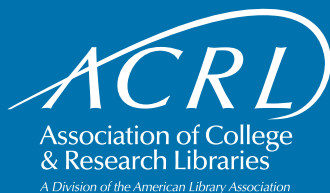
Frontline librarians and library workers need the tools to develop their personal powers of persuasion to advance the agenda of the academic library. This publication provides basic content on persuasion, techniques for persuading others, applications of persuasion techniques for libraries and recommended processes and examples for persuading others within higher education environments.

A PDF of this toolkit is available from [www.acrl.org/marketing](http://www.acrl.org/marketing).

This toolkit is also available for purchase. Visit the ACRL publications catalog at <http://www.ala.org/publications> for complete details.

Changes in higher education are compelling librarians to reassess the vision, mission, and role of the academic library; to redefine the image of the library; and to reposition the library as a key partner within the broader institutional community. We are already the acknowledged information professionals within our organizations. With an enhanced understanding of the dynamics of persuasion, we can more effectively advance student learning, increase our visibility, and positively influence decisions affecting our future.

~ Patricia H. Smith  
*Executive Director*  
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