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WHY MARKETING? THE EXPERIENCE OF MOI UNIVERSITY LIBRARY. KENYA

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# Planning in the Field of Library and Information Science Management

## A STRATEGIC APPROACH

*V. Kasi Rao*

In recent times, it has been well realized that, for faster pace of socio-economic development, it is not only necessary to promote scientific and technological research but also to disseminate information at a faster pace to the targets of their utilization. Further, it has also been well-recognized by many developing countries that a National Development Plan (NDP) should aim at developing a national infrastructure for scientific and technological information. This awareness on the part of national planners, information scientists and technologists has led to drawing up plans for different subject-oriented and mission-oriented disciplines/fields.

The Indian Government's policy regarding setting pace for applied and developmental research and the quicker exploitation of these results, as a part of progress towards self-reliant economy has placed an urgent emphasis on developing plans for different national, regional and/or local information centres.

### WHAT IS PLANNING?

Planning is a task or activity that is required on a continuous basis for the management of all organizations, including library and information centres. It is an ongoing basic management activity that is shared in varying degrees by all levels of management. Since all

managerial operations in organizing, staffing, leading and controlling are designed to support the accomplishment or achievement of objectives/goals, planning basically precedes the execution of all other managerial functions.

In other words, planning is deciding in advance what to do, how to do it, when to do it and who is to do it. Planning is essentially concerned with the future course of actions.

### THE NEED FOR PLANNING

With growing awareness of the role of information science, it is realized that proper planning and development of capability in

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information handling and dissemination help in decision making and advancement of knowledge, eliminating duplication of effort. It is also being realized that in the present day world no nation can prosper without high grade information networks. Developing countries like India need proper planning in establishing information networks in general and library and information centres in particular for promoting socio-economic development by making/disseminating full use of scientific knowledge.

### Types Of Plans

Plans are selected courses along which the manager/information scientist desires to co-ordinate group action. In this generic sense, plans for an organization/enterprise or a department such as library and information centre, have several manifestations. Thus, they may be classified/categorized in general in two ways which are schematically described in Figure 1.

□  
**PLANNING IS A  
CONTINUOUS  
PROCESS**  
□

Standing or multi-use plans are for repeating situations of a similar nature. The objectives, strategies, policies, procedures and rules and other essential components come into this category.

Single use or ad hoc plans are for special situations which may not be of a recurring type programmes. Budgets, schedule projects and methods are good examples in this category.

### Steps in Planning

Planning is a continuous process with a number of steps and falls into two phases:

- (1) pre-planning; and
- (2) planning proper.

### Pre-planning Phase

The pre-planning phase involves feasibility studies of the potential clientele, total information flow and current library services and resources, leading to pre-planning information collection, assessing library

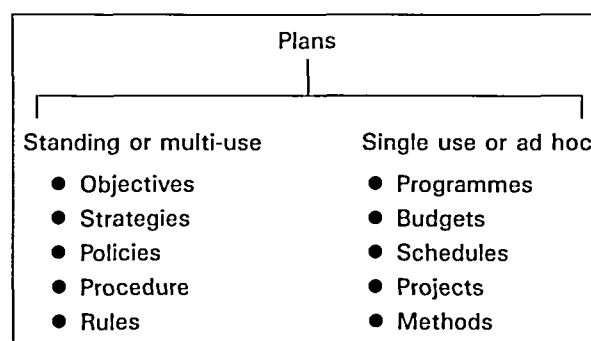


FIGURE 1.

needs and evaluating current library services and resources.

### Planning Phase Proper

The planning phase proper is concerned with determining the role of the library; setting objectives and priorities; developing, evaluating and implementing strategies; monitoring and evaluating.

In general, the different steps in planning may be stated as follows:

- *Definition of the objectives* — this involves an explicit statement of the essential goals of the library and information centres.
- *Formulation of the policies* — that is, formulating general guidelines to channel the thinking and action of different units, departments/divisions(sections) of the library or information centre towards achieving the objectives.
- *Determination of a course of action* — selecting the appropriate course of action from among several alternatives towards achieving the objectives.
- *Drawing up a budget* — a budget is essentially a statement of expected results expressed in numerical or financial terms. Budgets are usually conceived as central devices.
- *Initiating programmes* — programmes involve effecting and executing action in the frame of defined objectives, policies, procedures and budget.

### TOOLS FOR PLANNING

Planning involves estimation and forecasting of the requirements of several units of a library, information and documentation centre. The essential preliminary tools for the planning process of library and information centres are:

- standardization;

- work study;
- time study;
- systems analysis.

### PLANNING PROCESS

Basically, planning is the process of determining the ends (objectives) to be accomplished and the means (plans) that will be used to achieve such ends. The process of developing a plan involves the following steps:

- Formulate the task.
- Develop needed information.
- Evaluate alternatives.
- Decide among them.
- Interpret the decisions into a plan of action.

The above steps may further be elaborated as below:

#### Formulate the Task

- Define the scope.
- Identify the reason it is being undertaken.
- Define the characteristics of the answer sought.
- Consider the alternative methods of procuring answers.
- Select a method of solution based on cost-benefit analysis and resource availability.
- List the information required for solution.
- Specify the action required to develop the information needed.

#### Develop the Inputs

- Assemble the facts.
- Forecast or postulate the uncertainties.
- Develop the alternatives to be considered.

#### Evaluate the Alternative Courses of Action

- Convert alternatives that can be compared.
- Establish criteria for making a selection.
- Compare the alternatives.

Define the alternatives from the possible to the desirable, if the evaluation is complex.

#### Decide: Plan of Action

- Translate the decision into action: whose statements?; why the action is required; resources involved; consequences expected; control for interim measurement of progress by identifying critical forecasts and conditions to be monitored.
- Prescribe necessary performance standards.
- Prescribe the performance scheduled to be met.
- Prescribe the budget requirements to be met.

The procedures involved in planning shows that the mission of a modern organization seldom fails if the plan is according to the standards prescribed for planning.

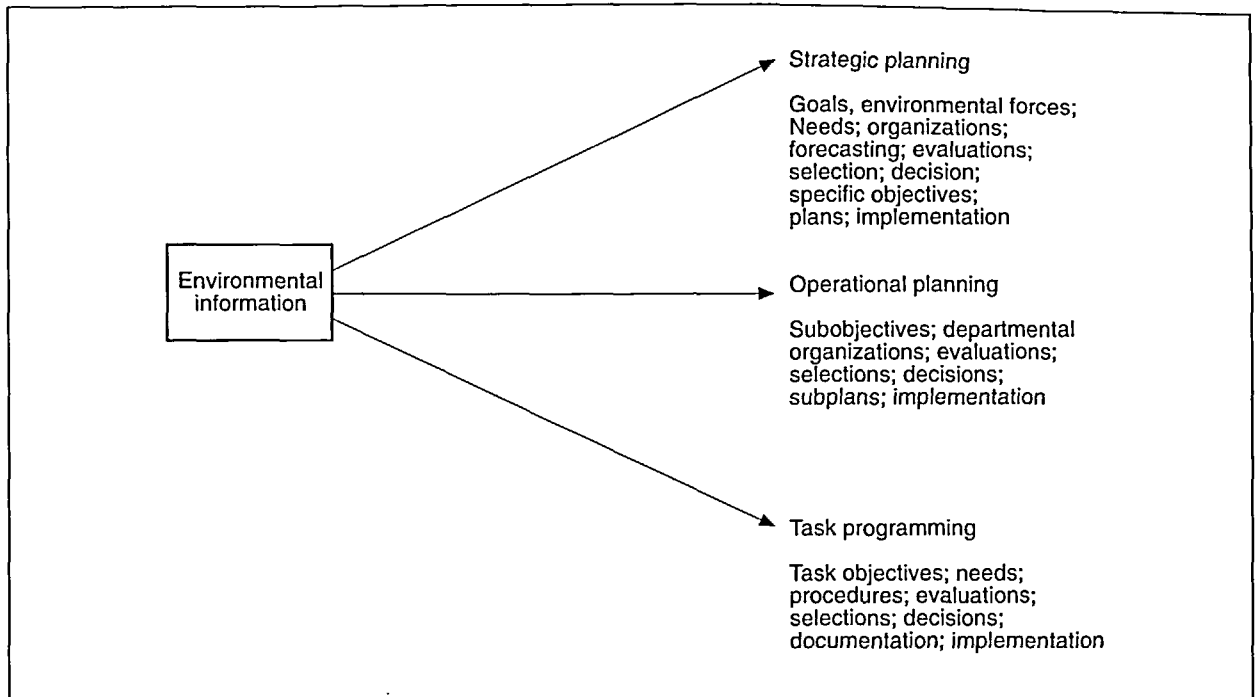
#### Systems Approach to Planning

In a systems approach to the planning of library and documentation/information centres, the following systems/parameters and procedures should be kept in view:

- the overall objectives of the information centres;
- the components and their characteristics;
- functional organization of the components into a coherent whole;
- the inter-links and relations among the components;
- the characteristics of the environment in which the information centre is to operate from time to time;
- the built-in control, preventive and corrective measures which would enable the system to adapt to the changing information environment and management policies and directions;
- the conditions for healthy growth and development of the information centre;
- identifying the agency which would ensure continuous inputs, management, evaluation and adaptation of the system along the right lines.

Alternatively, a conceptual framework or model for planning may be established. Broadly, its structure would include three major elements as illustrated in Figure 2.

Strategic planning is systematic graphing with future opportunities, problems and alternative course of action. Operational planning is the linking of organizational



**FIGURE 2.**  
**Total Planning Framework**

components (ie. techniques, materials, procedures, strategic plans, rules, people, capital and facilities) to facilitate the flow of interrelated events in a particular function. The emphasis at the second level is on people for getting things done through people. On the other hand, task programming contains plans of activities. A task is considered a particular event or a specified activity performed in relation to the tools, materials, equipment and technology used in achieving information centre's goals.

### **APPLICATION/ADOPTION OF PLANNING**

The application/adoption of planning principles in library and information systems is based on the types of plans.

Plans are varied and are classified on the following criteria:

- Purpose or mission.
- Objectives.
- Strategies.
- Policies.
- Procedures and rules.
- Programmes.
- Budgets.

### **Purpose or Mission**

Every organization should have a purpose or

mission for a meaningful existence. A clear definition of purpose or mission is necessary in order to formulate meaningful objectives, which can be achieved only through proper planning.

### **Objectives**

Objectives or goals are the ends towards which such activities are aimed. They represent not only the end point of planning but also the end towards which *organizing, staffing, leading* and *controlling* are aimed. Objectives or goals are plans that involve the same planning process as any other type.

### **Strategies**

A strategy denotes a general programme of action and implied deployment of emphasis and resources to attain comprehensive objectives.

The purpose of strategies is determined and communicated through a system of major objectives and policies.

### **Policies**

Policies also are plans. They are general statements which guide or channel thinking and action in decision making. Policies limit an area within which a decision is to be made. They help to pre-determine issues, avoid repeated analysis and give unified

structure to other types of plans. Policies may be major, covering a whole system, or minor, applicable to the smallest segment of an organization.

### Procedures

Procedures are plans which establish a customary method of handling future activities. They elaborate the precise manner in which a certain activity must be accomplished. Procedures are normally listed in a hierarchy of importance. In a library system, there may be a policy to lend periodicals for home reading. Procedures established to implement this policy will specify the nature of borrowing (through tickets or ledger system), period of loan, damage to the materials and compensation, etc.

### Rules

Rules are plans representing required actions chosen from among alternatives.

### Programmes

Programmes are a complex of goals, policies, procedures, rules, task assignments, steps to be taken, resources to be employed and other elements, necessary to carry out a given course of action. They are necessarily supported by capital and operational budgets.

### ADVANTAGES OF PLANNING

Planning of library and documentation systems has the following advantages:

- Planning helps to move systematically towards the achievement of the goals of a library and documentation/information centre.
- Planning helps to identify and differentiate between the essential priority actions and the less important actions in respect of achieving the specified goals of a library/documentation centre.
- Planning helps concerted and cohesive action by a group of people or a corporation towards achieving the ultimate goal of a library/documentation centre.
- Planning helps in rechecking, error-identifying and remodifying owing to unforeseen circumstances at any stage in the course of action.
- Planning helps in clear demarcation and allocation of activities among a group of

people, thus effectively controlling the course of action of different people towards achieving the goals of the library and documentation/information centre.

- Planning helps to draft a financially elastic budget. A good plan is capable of being readjusted to a slicing or enhancing of financial resource.
- Planning produces an integrated and yet analytical projection of a future course of action of library and information/documentation centre.
- Planning provides a basis for decentralization and efficiency in library and information management activities/operations.
- Planning provides a sense of direction.
- Planning focuses attention on objectives and results and reduces uncertainty and risk.
- Planning helps in co-ordination and guides in decision making.
- Planning encourages innovation and creativity.

### PROBLEMS INVOLVED IN PLANNING

The major problems that impede planning for the effective and efficient function of a library and information service are:

- Tremendous store of information, rising unabated at an exponential rate.
- Several barriers to providing access to information.
- Inadequate infrastructure and sources of information.
- Complexity of information — with multi-disciplinary, multifaceted, multi-dimensional approaches.
- Lack of studies on the needs, wants and demands of information users.

### BASIC REQUIREMENTS FOR PLANNING

The following activities are involved in the planning of a library and information centre:

- Planning for collection building.
- Planning for information service/product.
- Manpower planning.
- Furniture/equipment (materials) planning.
- Space planning.
- Financial planning.
- Planning for system design.

## ASSESSING NEEDS

In order to assess the library and documentation/information centre's activities/services for future development, the following methods may be used to assess the future development of a library and documentation/information centre's activities/services:

- (1) *Opinion survey (questionnaire method):*  
For ascertaining the overall opinions of the various types of users; identifying the information requirements significant use of information, resources and types of information services.
- (2) *Suggestions slips:*  
For acquiring the significant use of information resources.
- (3) *User studies/surveys:*  
For identifying the users' reactions to the information activities/services by such means as user-oriented conferences, seminars, workshops, etc.

## STRATEGIES FOR FUTURE DEVELOPMENT

The following strategies are necessary to planning for the future development of library and information activities/services:

- A National Information Policy should be considered for implementing modern/innovative methods in information activities.
- Common standards and norms should be adopted in order to facilitate the exchange of information at international level.
- The formulation of plans and programmes should be guided by the broad goals and directive principles and implemented on priority basis.
- User-friendly on-line information systems and services should be designed and developed to provide an easy — and multi — access to information.
- New technologies, such as CAR, COM, Teletex, Videotex, Fax, Optical Disk, etc., should be introduced for effective storage, retrieval and dissemination of information.
- The existing infrastructures should be strengthened and systematized for identifying the new sources of information.
- Current Awareness Services, such as Selective Dissemination of Information (SDI) and abstracting and indexing

services, should be supported in order to meet the specific needs of the research and development community.

In order to develop the above strategies, adequate funding support by any organization to the information field is necessary for challenging the new technological changes in the information environment in future.

## SOME CONCRETE STEPS TO TACKLE SOFTWARE PROBLEMS

The following are a few concrete steps suggested and recommended for improving the situation related to library and information software in India. Plans for implementing such steps should ideally be evolved as a collaborative effort between the agencies like IASLIC, ILA, NISSAT, DSIR and other research and educational institutions like RILISAR, MALA and INFOTEK:

- Introduce papers on computer programming, library automation, software packages etc. at BLIS and MLIS Degree levels with particular attention to practical orientation. Libraries and schools should have their own hardware for this purpose.
- Collaborate closely with agencies like UNESCO in popularizing software packages like CDS/ISIS and SUPERDOC in India.
- Keep in touch with the educational and research institutions like ERIC (Educational Resources Information Centre) for implementing such new techniques as CD-ROM technology in India.
- Associate closely with organizations like NISO (National Information Standards Organization) and ANSI (American National Standards Institute) for developing standardization of formats of data on disk and the means of accessing data for CD-ROM products and its implementation in India.
- Develop software for housekeeping routines in high level languages for IBM/PC compatible micros and make these available to interested institutions.
- Develop a core group of specialists in computer applications to the library and information field, who can be called on

to provide consultancy, training, installation, etc.

- Organize training courses for working librarians/information scientists with greater emphasis on hands-on experience using software packages.
- Formulate and publicize microcomputer configurations required to meet the needs of different types of libraries/information centres, taking into consideration types of application and size of library. This should help librarians/information scientists to acquire a computer that will meet their needs. This is important since, out of initial enthusiasm, we will tend to underestimate or over-estimate the system requirements.
- Provide intensive courses on computer software and hardware to selected library and information science teachers who are identified to disseminate this knowledge for the students community.
- Produce printed guides to automation in library/documentation centres on topics

such as — Use of word processor, DBMS and Spreadsheets (LOTUS 123), criteria for selecting hardware and software, use of software packages like CDS/ISIS and programming for library and information work, etc.

### CONCLUSION

Planning is essential for systematic development and is the basis for all scientific growth. It has to do with anticipating aspects of the future, considering alternative courses of action, choosing a particular sequence of actions and allocating vital resources, (space, money, machine, labour, information and time) for some pre-determined purposes.

In planning library and information systems and services, careful attention should be given in order to meet/serve the specific needs of the user community.

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