

## **Merging academic libraries: An opportunity for a face-lift?**

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### **Context and objectives**

Over the years, libraries have managed change by adapting themselves to new needs and by working with tools as they appeared in their environment. We consider now that facing the future and adapting to a global electronic world requires a more rigorous, systematic and comprehensive approach. Marketing is a wide-ranging management style. It offers a large variety of procedures involving analyzing (strategic marketing) and acting (operational marketing) for the optimal functioning of an organization, in our case, a library. However, the discipline of marketing has played no part in our training in library science and life sciences.

In order to guarantee the quality of our approach, it was decided to entrust the management of the marketing project to a staff member, who has a Master's degree in psychology and who will turn the project into a doctoral thesis. As a first step, a literature review was initiated according to the principles of EBLIP (Booth et al. 2004)<sup>[1]</sup>, in order to build a strong theoretical background and to select a toolkit suited to our needs and objectives.

This decision comes in a context where the libraries of Medicine, Veterinary Medicine, Botany, Zoology, Psychology and Educational Sciences have been requested to merge. The organization of the transfer of the collections has taken several months. Staff will also join together into a larger team of 24 people working in the same environment. For the smallest libraries, the situation is quite challenging, as they face major changes in their future organization. However, an enhanced workforce will give us the opportunity to improve the organization of the library and to consider new projects.

The merging of the libraries has created uncertainty about the future. In order to reassure the staff, and given the impending move, it was decided to launch the marketing project immediately before completing the literature review, and to initiate research in close collaboration with each librarian in the team.

### **A definition of library marketing**

Many people have a negative and narrow vision of marketing, thinking of it only in terms of advertising campaigns and promotional measures. Others consider that academic libraries are not concerned with marketing.

Understanding the concept of marketing is essential to starting the project from a solid foundation.

There are many definitions of marketing, but the one given by Dinesh K. Gupta's (2006)<sup>[2]</sup> has held our attention: the marketing of the Library and Information Services can be summed up as “*a mindset, a management style, a set of techniques and a customer focused*

*approach*". The mindset is *"affected by the values, behaviors, and assumptions of the providers of the service"*. The management style relates to *"staff behaviors, the appearance of the library, the design of the interior and exterior, the language of the organization as a whole as spoken with the customers, and the way the service is delivered"*. The set of marketing techniques is *"necessary to formalize the use of marketing in libraries"*. And *"the customer is the pivot around which the marketing strategy should turn and all efforts must specifically address the meeting of customer needs"*.

Gupta also cites Larry Amey (1993): *"Marketing is not a one shot proposition. It is not something that you get right and apply for all time. Your library will change. Staff changes and the mix of expertise and skills in various areas will change as people come and go. Users change, user needs change, and sources of information and means of delivery changes"*.

## **Literature overview**

Raw searches of bibliographic databases gave us an overabundance of documentation. The concept of marketing is so wide that it was not possible to apply strictly the principles of Evidence-Based Library and Information Practice (EBLIP). Too many questions were raised. Many different approaches were found, but the sequence of actions was not clear for us. Where to begin?

A few textbooks were our starting point. Then, an existing bibliography, written and edited by Daria Decooman (2005)<sup>[3]</sup>, was evaluated. This bibliography includes more than one hundred articles, papers and websites relevant for either strategic or promotional marketing. Our reading was focused on a first category of articles related to strategic marketing. Each of these was scored and a selection of the most relevant papers was made in order to focus on the ones that had a strong theoretical background and/or provided detailed methodology and data.

## **Scoring method**

Our scoring method was based on PICO.

- The "P" set of criteria is for the population or setting, in this case a "library". An additional weight was given to this set of criteria, when the studied library belonged to the academic world. (P = academic library > public library).
- The "I" set of criteria is for any intervention relating to marketing (I = marketing intervention).
- The "O" set of criteria is for "outcome". In the present case, "O" designates resources providing detailed methodologies, protocols or procedures.

Of course, we also paid attention to the year of publication.

Resources relevant to one or several of these criteria were given a score according to a scale from one to four.

- Score 1: *"The document has no interest for us or is outside the topic"*.
- Score 2: *"The paper is of low interest or is of theoretical interest only"*.
- Score 3: *"The paper talks about academic libraries. The developed aspects of marketing are interesting, but the methodology is not sufficiently developed"*. Or: *"The paper provides strong methodological support, but concerns public libraries rather than academic ones"*.

- Score 4: The resource is positive for all the criteria. *"It provides strong methodological support and validated procedures related to any type of marketing intervention in academic libraries"*.

Here are some examples of publications on the topics of “customer service”, “media relations” and “public relations”, which have caught our attention:

- Brower S. Teaching e-journals: Building a workshop for an academic health sciences library. *Ser Rev.* 2002;28(2):88-92.  
This author proposes the teaching of e-journals (use, selection, costs,...) to users. He details the process of creating a workshop about this.
- Cardwell C, Furlong K, O’Keeffe J. My librarian: Personalized research clinics and the academic library. *Res Strat.* 2001;18(2):97-111.  
The authors explain that the Association of College and Research Libraries recommends that “libraries make available a variety of learning opportunities”. Even if more emphasis is placed on distance education, it is important that librarians provide, by appointment, individualized assistance to readers (for researching a database, seeking documentation in the physical library...). The authors describe three programs on this topic, called PRC (personalized research clinics).
- Germain CA. 99 ways to get those feet in the door: How to develop a public relations campaign. *Coll Res Libr News.* 2000;61(2):93-6.  
The author explains specifically how to develop a public relations campaign: 1) Forming a committee, with people passionate about the library, including even those from outside the library; 2) Getting to know the campus by conducting focus groups, surveys and interviews; 3) Preparing a public relations plan (the author gives 99 ways to reach the public); 4) Evaluating the program regularly.

Our plan for the future is to make these evaluations available to all interested librarians, for example, on an open-access website providing links to protocols, methodological grids, teaching aids and examples of strategies implemented by libraries. In this way, everyone could benefit from our collation and analysis work.

## Marketing backbone

Marketing starts with the analysis of various elements: existing and potential categories of users, existing and potential services, the internal (the library, staff, budget) and the external (faculties, hospitals, competitors) environment. This important phase of research and analysis, called environmental scanning, provides the elements necessary for the formal writing of a strategic plan giving the objectives of the library as well as the available means. The marketing plan is the part of strategic planning describing the sequence of actions necessary to achieve library goals. At this point of the process, the library is supposed to engage in different activities or attitudes:

- **Branding**: branding refers to the definitions or images that are associated in the user’s mind with the word “library” (brand identity). It can also refer to the images that librarians would like to suggest to their users about the library space and services (brand aspiration) (Dempsey 2004)<sup>[4]</sup>.
- **Public relations**
- **Promotional activities** and **special services** refer to all kind of publicity and other

creative measures intended to reach different audiences. They include liaison efforts and the provision of outreach services, which it is envisaged will encourage non users to use the library and its resources.

- ***Fundraising***
- ***Evaluation of performance***

These steps link together and generate retroactive effects that keep the library environment and services in constant evolution.

All these topics correspond to the many skills to be acquired by librarians and to be applied in a systematic way. There are well documented ways of doing things and of following procedures, which we will have to study.

Based on our current understanding, we have observed some weaknesses in the evaluation process with regard to the library. We will, therefore, pay particular attention to the analytical part of the doctoral thesis.

### **Initiated research**

Literature reviewing is a time-consuming activity. In parallel to our theoretical approach to marketing, internal research was thus initiated, considering that further readings would be more efficient if oriented according to specific needs.

On the one hand, drawing a detailed picture of the library and getting to know its users better appears to be an obvious necessity. It is indeed one of the major preliminary steps in strategic planning (Ewers et al. 2006<sup>[5]</sup> ; Gupta 2006<sup>[2]</sup>).

On the other hand, starting to collect data increases our motivation. Christopher Connie's book (2003)<sup>[6]</sup>, about the empowerment of a library, encouraged us through the following comment by the author: "*Although we can learn from others, at some point the need to know everything becomes an excuse for not acting. The core of empowerment theory is that the answer lies within ourselves*".

It is another deliberate choice for the future to put the staff at the center of the marketing approach. Their opinion is important. Christopher Connie (2003)<sup>[6]</sup> advises the creation of a shared vision and trust because this is a powerful motivator: "*Staff energy and commitment are needed as well to fully utilize a library's human resources*".

In addition to attending to the practical preparations for moving, the staff were invited to participate in two kinds of activities, which might be compared to an internal audit.

First, the library was closed and all the employees gathered together for a group meeting. After a brief introduction to the marketing project, they were asked to share their visions about the current and future library. They had thirty minutes to comment in writing about the same two questions. Then, an open discussion began, conducted by the project leader.

As expected, different attitudes were observed according to the personality of each participant. But, progressively, once the element of surprise was gone, everybody participated willingly in the discussion. In the end, time was too short and everyone would like to have had more time. Completed questionnaires were collected for further analysis.

This exercise was only an introduction to a longer questionnaire containing more focused questions. This time, the staff had two weeks' thinking time and were asked to send in their answers by e-mail.

This internal research was rich in information. It provided a first internal assessment of the library missions, strengths and weaknesses and an overview of the services to be improved, promoted or created. Categories and subgroups of users were identified, together with their characteristics and an external perception of their possible needs.

Consulting the staff was an exploratory move, a sensitization approach. Of course, no consensus has yet been reached, nor has any decision been taken for the moment. Nevertheless, an intuitive environmental scanning phase has been started, which will be compared to a more formal approach.

### **ALA Procedure**

The American Library Association and the Association of College & Research Libraries (ACRL is a division of ALA) have partnered to develop a marketing campaign and to sustain a national effort to promote the value of resources and expertise provided by libraries and librarians. Their *marketing@your library* website<sup>[7]</sup> provides all kind of materials and assistance in order to maximize the communication efforts of academic and research libraries. Further comments on these areas of support can be found in the discussion part of this article.

The originality of the ALA/ACRL approach lies in its proposal of three different strategies with corresponding guidelines in order to adapt them to three different situations.

The first option is intended for small and medium-sized libraries where a single librarian or a small team of 3-4 staff members are confronted with the challenge of preparing a promotional campaign.

The second strategy outline is tailored to leading the marketing process by working with a large group or the whole staff.

The last option is designed for experienced facilitators who want to organize train-the-trainer workshops in order to help others to become trainers of the process.

As already mentioned, our choice is to involve the whole staff, so we were particularly attracted by the fact that ALA/ACRL considers that specific option. Our objective is to apply the ALA method and to compare our own preliminary results with those obtained through such a systematic and more comprehensive approach.

### **Discussion**

To summarize, a first literature overview was made and interesting papers were found and evaluated, including the ALA procedures. At the same time, research was initiated with the staff, which may be considered as a preliminary environmental scanning.

Compared to this intuitive approach, the ALA procedures present several advantages. They contains all kind of tutoring materials (syllabus, slides) designed to the staff in the theory of

marketing. A facilitator guide is at the disposal of project leaders with options, outlines, and tips in order to help them to organize workshops and to catalyze the sharing of ideas. Worksheets, grids and examples are provided to guarantee the systematic collection and analysis of data. The entire marketing process is considered including the evaluation of customer needs, the listing of products and services, the perception of the benefits received by users, the creation of messages, as well as the selection of vehicles for promotional campaigns. Of course, the questions asked during our informal approach are found in the ALA grids but these grids also raise many other points, which are interesting and which are not in our questionnaire.

Many other procedures were found in the literature, supporting strategic marketing. The advantages of the ALA guidelines lie in their comprehensiveness and the quality of their educational content. Our plan is to try them and to compare the new set of results with our preliminary observations. In doing this, we expect to acquire experience that will help us to evaluate the strengths and weaknesses of other strategies described elsewhere.

A website or other source of support summarizing our work will be set up in order to share our experience with all those interested in developing library marketing.

## **Conclusion**

Marketing is a very exciting topic. Our perception of the library has already been modified. Some strengths and weaknesses have been identified. For example, bachelor's students seem to be a neglected user category. Thus, as Anne Carol Germain (2000)<sup>[8]</sup> says: "*the campus is not a one-size-fits all audience*" and she explains that there are "*many target groups that have different needs and modes of approach*". Consequently, students might be one of our first target groups.

The positive attitude and enthusiasm expressed by our colleagues regarding our approach has reassured us that we made the right decision in involving the staff in the process. They can be both decision makers and agents of change, but with the corollary that they improve their own competencies. Staff-oriented continuing education appears to be an important key for success. Marketing is not just about creating a website or making beautiful posters. Our preliminary experience has highlighted the strong relationship existing between marketing and human resources management.

Even though the staff are at the center of the project, leaders and coordinators are indispensable and must be designated. They will also play a key role in the data collection, analysis and planning (Norris 2005)<sup>[9]</sup>.

The marketing adventure requires fundraising. At some points of the project, it will probably be advisable to appeal for an external audit or to seek external support. The creation of promotional support and the adaptation of infrastructure also cost money.

Another key to our success will be the systematic feedback towards and from staff and users. The marketing approach is something that will not end.

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