Evidence Based Library and Information Practice

Conference Paper

Marketing and Assessment in Academic Libraries: A Marriage of Convenience or True Love?

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Abstract

Objective – This paper describes the process of cooperation between the Marketing and Assessment Teams at the University of Haifa in Israel, from initial apprehension about working together to the successful marketing of a suite of user studies.

Methods – The first step was a formal meeting in which the leader of the assessment team explained the aims of assessment. For each assessment activity, the assessment team submitted a formal request for assistance to the marketing team, conducted team meetings on how to market each assessment, and met with the marketing team to explain the survey and receive their input on how it should be marketed. Over a 3-year period, 5 joint activities were undertaken: a 1-day, in-library use survey; a wayfinding study, in which 10 new students were filmed as they searched for 3 items in the library; 5 focus group sessions regarding upcoming library renovations; a LibQUAL+® survey measuring perceptions of service quality among the entire campus population; and an online survey of non-users of the library. The success of the assessment/marketing projects was measured by the response rates, the representativeness of the results, and the number of free-text comments with rectifiable issues.

Results – Although the response rates were not very high in any of the surveys, they were very representative of the university population. With over 40% or respondents filling in free-text comments, the information received was used and applied in making service changes, including the creation and marketing of additional group study rooms,

improved signage, and the launch of a "quiet" campaign. In addition, a "You said – We did" document was compiled that outlines all of the changes that were implemented since the first four surveys were conducted; this document was published on the library's blog, Facebook page, and website.

Conclusion – The number of issues that appear in the first "You said – We did" document is a testament to the close and ongoing collaboration between the two teams, from the planning stages of each survey until publication of results and notification of the changes that were implemented.

Introduction

The last decade has seen an increase in the interdependence of library marketing and assessment (Alire, 2007; Wright and White, 2007) – a relationship whose importance was recognized earlier in the private sector by Souder (1981) who found that "R & D/Marketing interface problems was a major factor in the failure of new products" (p. 67). And it is not uncommon in the private sector for marketing managers to carry out both assessment, or market research, and marketing tasks (Baker & Hart, 2008). This interdependence was first mentioned in the library literature by John Sumsion (2001) when he stated that "'Marketing' and 'user studies' may employ different terminology but, in reality, they are two sides of the same coin" (p. 221) and was followed by Kearns' (2004) more explicit explanation:

Marketing and assessment are converging in libraries…librarians are recognizing that assessment and marketing are intertwined so that libraries cannot be marketed without knowing what users want or need, and that libraries cannot be assessed if users do not know what they can or do offer. (p. 51)

This "symbiotic relationship between marketing and assessment" was further reinforced in a paper given at 2006 Library Assessment Conference by Becher & Mintz (2007, p. 80).

Promoting library assessment activities is not an easy task for most libraries and the difficulty is compounded by a dearth of professional literature on the subject, though one useful publication is "Suggestions for Marketing your LibQUAL+® Survey" (LibQUAL+®, 2010). However, coordinated marketing and assessment efforts prior, during, and after survey administration can lead to increased response rates, greater visibility, and increased library use – as seen at the University of Haifa and some American university libraries (Becher & Mintz, 2007).

Since the 1980s, many academic libraries have been aware of the need to market their resources and services "in order to facilitate the achievement of important organizational goals" (Spalding & Wang, 2006, p. 502). However, library marketing is still not widely practiced outside of the US (Enache & Simona, 2008), partly due to the substantial effort and budget required to do so effectively. And even in the US where many libraries do market their services, very few have an independent marketing unit – more often marketing is linked to a library development or fundraising department (Dewey, 2006). By the same token, library managers are becoming increasingly aware of the importance of assessing their activities in order to accomplish their strategic goals (Joubert & Lee, 2007). As a result, marketing teams are now faced with the need to market not only their library's resources and services, but also to promote surveys and other assessment activities,

which require the participation and goodwill of users (and non-users); and to publicize the results of these surveys, which may not show the library in an entirely positive light.

Goals of University of Haifa's Marketing and Assessment Teams

In 2006, the University of Haifa Library made a strategic decision to create two teams to address marketing and assessment issues. A six-member Marketing Team was chosen by the library management with members from each of the main departments. The criteria for inclusion were based on professional abilities and leadership and interpersonal skills. For example, one member was the library's graphic designer, one was the library's web site manager, and one was in charge of the blog. The team leader had very good connections within the university, such as with the university's central public relations department. The team was given the following goals:

- To promote awareness of existing and new library resources and services
- To increase accessibility, awareness and use of library resources and services
- To increase visibility of the physical and digital library

A year later, a nine-member Assessment Team – two of whom were also members of the Marketing Team – was formed. The original team leader was the Head of Reference; but she retired a year later and the job was assigned to the Head of Interlibrary Loans. This individual had just finished writing a doctoral dissertation in Information Science and was one of the few librarians within the organization with experience in survey administration and statistics. The other members were talented librarians – most in non-managerial positions – who were familiar with the library's strategic plan and vision. The team was given the goal to create a "Culture of Assessment" defined as:

an organizational environment in which decisions are based on facts, research and analysis, and where services are planned and delivered in ways that maximize positive outcomes and impacts for customers and stakeholders. A "Culture of Assessment" exists in organizations where staff care to know what results they produce and how those results relate to customers' expectations. Organizational mission, values, structures, and systems support behavior that is performance and learning focused. (Phipps & Lakos, 2004, p. 352)

It was later summarized by Covey (2005) as "a set of beliefs, behaviors, and assumptions that drive an ongoing cycle of data gathering, analysis, interpretation, organization, presentation, and use to achieve planned objectives" (p. 83).

- To assess the extent to which the library is meeting the needs of its customers.
- To assess the extent to which library customers are satisfied with library services.
- To recommend the implementation of changes in the library based on the surveys that are conducted.

Initially, neither the Marketing nor the Assessment Teams were very enthusiastic about cooperating with each other, but the mutual benefits of doing so soon became apparent. The Marketing Team could benefit from the Assessment Team's market research which would assist in priority-setting: and the Assessment Team could benefit from the Marketing Team's assistance in promoting its activities. In addition, as both teams were quite large and consisted of members who had primary job responsibilities outside of marketing and assessment, the workload and expertise could be distributed among more people. Some of the difficulties encountered and how we overcame them are outlined below.

Reservations about conducting joint marketing/assessment projects

The main reason for the Assessment Team's reservations about working with the Marketing Team stemmed from a fear of loss of autonomy regarding decision-making. For example, decisions about the wording on invitations, posters, blog posts, etc. would be made in conjunction with the Marketing Team. There was also a concern about the practicalities of working with so many people across two large teams.

There were several reasons why the Marketing Team was concerned about marketing assessment activities:

First, marketing is a time-consuming, expensive and labor-intensive process; and it is far more difficult to market assessment activities that have no immediate benefits to the user, than it is to market essential library resources, services, and products.

Second, it is necessary to enlist the goodwill of users who need to be convinced of the future benefits of devoting their time to a survey and inevitably need to be offered expensive incentives.

Third, there was a belief among some librarians that assessment is redundant (unlike marketing which was unanimously accepted as necessary). For example, when the University of Haifa Library carried out its Wayfinding study, some librarians commented that they knew what the problems were, so why bother conducting a survey? And prior to conducting an in-library use and LibQUAL+® surveys, some librarians argued that the majority of survey respondents are either gripers or hold exceptionally pro-library views – "library cheerleaders or disgruntled users" as Kearns (2004, p. 52) describes – so why bother surveying them?

Fourth, there was a belief that marketing would not increase survey response rates for some assessment activities. For example, a non-user survey conducted by the library was believed to be redundant by several librarians because it should be in a student's own interest to use the library and not the library's responsibility to market to disinterested students.

Fifth, the difficulty of publicizing negative results was cited. For example, LibQUAL+® results from 2009 showed a gap between the perceived and desired levels of noise in the library, which proved challenging to publicize as there was going to be even more noise during upcoming renovations.

Sixth, the results of library assessment activities may show that current marketing activities are deficient. Recent studies show that more than 40% of students lack knowledge about library services and resources (George et al., 2006; Washington-Hoagland & Clougherty, 2002); and several of the University of Haifa Library's surveys showed that many of the desired services already existed, such as home delivery of books and articles, electrical sockets for laptop computers, etc.

Seventh, there are very few courses in library schools on marketing or assessment, so librarians had to learn these skills on the job. At the University of Haifa Library, none of the marketing or assessment librarians had received formal training apart from a few professional development courses, guidance from a faculty member, and training opportunities offered by the Association of Research Libraries (ARL).

Finally, the difficulty of depending on the efforts of others was cited. For example, a graphic designer and the university's central public relations staff had many other commitments and time constraints which would inevitably delay progress.

Despite all of these reservations, several assessment projects were successfully marketed during the past three years, following a request for assistance from the assessment team and with the approval of the library administration.

The first step was a formal meeting in which the leader of the Assessment Team explained the aims of assessment to the Marketing Team. Next, an assessment logo with the slogan "You can impact the library!" was created, which appears on all assessment materials, followed by the creation of a library assessment website (http://lib.haifa.ac.il/libinfo/assessment/index.php/en/). For each assessment activity the Assessment Team submitted a formal request for assistance from the Marketing Team, conducted team meetings on how to market each assessment, and met formally with the Marketing Team to explain the survey and receive their input on how it should be marketed. The two teams never met in person, but there was a lot of e-mail correspondence to/from all team members. Many of these e-mail discussions were lively and agreement was not always reached easily. For example, the marketing team usually wanted catchy attention-getting phrases, whereas the assessment team preferred messages that conveyed the true intention of the surveys.

In May 2008, following the advice of ARL consultants, Steve Hiller and Martha Kyrillidou, the University of Haifa Library ran its first assessment, an in-library use survey, which was a Hebrew translation of the University of Washington's one-page questionnaire on what users did in the physical library on a particular day. The survey was distributed during two-hour periods for two weeks in the middle of the second semester. Posters were hung up around the campus; updates and photographs were posted on the library blog, the library and university web sites, and on the plasma television screens within the library. Balloons were hung at the entrance to the library and student employees with library t-shirts approached potential participants and handed

out questionnaires and sweets. Boxes decorated with the assessment logo were used for returning completed forms.

After the survey closed, a summary of the results was published on the library blog, on the library's Facebook page, and presented at library staff meetings and at national and international conferences.

The next joint marketing project was a wayfinding study, conducted in November-December 2008. Attractive invitations were sent by e-mail to a sample of 110 new students who were asked to choose a convenient day and time to participate in a study in which they would be filmed in return for $15. Of the 20 positive responses 10 students turned up on the assigned day. The participants were asked to find three items in the library and were observed attempting to complete the assignment. After the assessment team viewed all the sessions, the results were transcribed, analyzed and published as a report on the library blog and discussed at staff meetings.

From March-June 2009 five focus group sessions on the subject of the upcoming library renovations were conducted. Attractive invitations were sent by e-mail to a sample from five specific user groups: BA, MA, and PhD students; Research Assistants; and faculty members. Fifteen dollars were offered to each student participant as an incentive.

In May 2009, LibQUAL+® was administered for the first time. Marketing began by sending a letter to the entire population of 22,000 students and faculty. Posters were hung up around the campus, and the survey was advertised on the library and university web sites. Student employees roved the campus with laptops and offered assistance in completing the survey. A raffle of food, drink, and bookshop vouchers were offered as incentives.

A more recent assessment was a non-user survey, conducted in May 2010. A one-page,

online questionnaire was sent by e-mail to 5,000 students and faculty who had not borrowed a book or accessed the electronic offprints' database during the previous academic year via QSIA (Question Sharing, Information and Assessment), the library's software for creating online exams, assignments and surveys. The Patterns of Use Questionnaire aimed to increase the library's understanding of how people obtain academic information so that respondents would not know that they had been targeted as non-users. No incentive was offered and no marketing was done due to problems targeting the desired group, such as obtaining active e-mail addresses. As expected, the response rate was very low, possibly due to the lack of marketing, but more likely because of technical problems during the first few days of survey administration and the inherent difficulty of getting non-users to respond to such a survey.

Measuring Success

The success of the assessment/marketing projects was measured by: the response rates, the representativeness of the results, and the number of free-text comments with rectifiable issues. Although the response rates were not very high in any of the surveys, they were very representative of the University of Haifa population; and with over 40% of respondents filling in free-text comments the information received was used and applied in making service changes. Based on the survey results and comments received, several changes were implemented, such as the creation and marketing of additional group study rooms, improved signage, and the launch of a "quiet" campaign – all of which have improved services for users.

For the quiet campaign posters, screen savers for the public workstations, and colorful bookmarks were produced, which seemed to have a very positive effect on the noise level in the library. In addition, a "You said – We did" document was compiled which outlines all the changes that

were implemented since the first four surveys were conducted and was published on the library blog, the library's Facebook page, and the library website. Some of the changes were already in the planning stages before the surveys were conducted, and these were more easily implemented once confirming information was received. However some issues such as the widespread dissatisfaction with the noise level were not previously known and the quiet campaign was implemented as a direct result of the in-library use survey. The high priority given to implementing these changes is directly connected to library management's vision of improving service and putting the user at the center.

The following list shows examples from the 2010 "You said – We did" document which was published on the library website:

- **Quieter library:** A member of the library staff now roves the library during peak hours and asks people to turn off their mobile phones
- **Group study areas:** An additional group study room was opened with desks, computers, and a drinks machine was installed
- **Help locating books on shelves:** An internal telephone helpline was installed in various places in the library, and temporary library staff members now wear purple shirts for easy identification if help is need among the stacks
- **Improved signage in the library:** Signs were added at the entrance/exit and to the Media and Periodicals Departments that help orientation within the stacks
- **Entrance to the library with bags:** Entrance with bags is now permitted together with plans for installing lockers in the new library wing
- **One place to search for all library information:** The federated "OneSearch" database was launched allowing simultaneous searching for books, articles, images, maps, videos, and databases.

- **Easy to use library web site:** A new user-friendly web site was launched
- **Simplified remote connection to the library:** A web-based single sign-on method has replaced the old method of individual proxy authentication
- **One-on-One Reference services:** Advanced reference services are now available for graduate students and faculty

In addition, the following improvements were made:

- More electrical outlets for laptops
- More public workstations and loaner laptops
- A more liberal loan policy regarding DVDs
- More access to full-text articles in Hebrew
- Widespread notification of library resources via electronic notice boards, monthly email newsletters, the library blog, Facebook, and Twitter
- Drinks machines were installed
- A more comfortable and welcoming physical space
- Shorter queues at the Reference desk
- Reduced cost of Interlibrary loans
- Better assistance with technical questions

Conclusion

The number of issues that appear in the first "You said – We Did" document is a testament to the close and ongoing collaboration of the Assessment and Marketing Teams, from the planning stages of each survey until publication of the results and notification of the changes that were implemented. These activities have also been supplemented with additional assessment efforts, most notably an in-house survey and usability testing. In this respect, the relationship is not just one of convenience; it is based on true love.

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