Marketing the IR: Strategies from the Marquette Survey

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Recommended Citation
https://epublications.marquette.edu/lib_fac/71
Much of the literature on IRs agrees on the importance of marketing, however, very few articles discuss the marketing process or give concrete examples for doing so. When we decided to create a marketing plan for MU’s IR, we started with a survey and we used the results to inform the creation and implementation of a marketing plan. Also, in this context, marketing means marketing to the faculty for the purpose of receiving more materials for deposit.
Started with theses and publications in 2008. In 2009 a Digital Projects Librarian was hired to oversee the IR. Faculty works were solicited and started to be added at this time. Since that time, faculty research and publications account for approximately 42% of the materials in ePubs. The rest are ETDs, RTDs, student work, and other projects.
The IR exists more or less on its own within the larger scope of the university. We view it as a campus initiative, though I suspect the rest of campus mainly views it as a library initiative, with little official support from administration. It has its supporters, and a few detractors. Fortunately, the detractors aren’t especially vocal and manifest mainly through apathy.

A perennial problem…
- How do we keep collecting faculty work?
  - No mandate for deposit
  - No statement of support for open access from administration or the Faculty Senate
Efforts to market and raise the profile of the IR with its main constituency (faculty) have been going on since the beginning. When I started, I recognized pretty quickly that having a consistent, and repeated message was the only way we were going to keep feeding the IR. In partnership with the Coordinator of Outreach and Marketing, we surveyed the faculty to get an idea of the direction we wanted to go in for the marketing plan.

The survey

- Decided to develop a small-scale marketing plan for e-Pubs
- First step was to survey the faculty
  - Gauge faculty awareness of e-Pubs
  - Why don’t faculty use the IR
  - What value do faculty perceive in using the IR
  - Which additional services should be incorporated into e-Pubs
The law school has its own IR, so we decided to exclude them from the survey. Their responses would have been based upon the Law Library’s efforts in marketing their own IR, and not as useful for our purposes. Response rate wasn’t great, but was consistent with other library surveys in the past. The results weren’t enough to be generalizable, but were enough to provide some direction for the marketing plan.
Not a bad percentage, however analysis of our database puts the percentage closer to 39%, and that number is a little iffy. There is probably some self-selection going on here. Still, the number is decent, given our lack of a mandate or administrative support. There is definitely room for improvement.
Speaks to a need for effective marketing. Almost 40% are unaware of ePubs. Depositing in ePubs *is* exceedingly easy=another opportunity for marketing. Responses under “Other” included concerns about copyright, satisfaction with current traditional avenues of research dissemination.
Greatest value is perceived mostly around the increased dissemination of research, though having use statistics was a great motivator as well.
Originally, this was a bit of a throwaway questions. However, the results are interesting in that they deviate from the typical response. Most surveys have found faculty motivations hinge first on their career, second on their discipline, and third on promoting their institution.
Data and conference materials archiving were the clear winners here, with digital humanities as a close third. New services won’t be discussed further in this presentation. The faculty have expressed interest in a number of new services, however, most of those can not be implemented right away. Considerations of current workflows and staffing limit our ability to fully implement services such as data preservation and digital humanities at this time, though we are experimenting with both of these concepts.
Once we analyzed the survey results, we had some concrete directions and ideas on messaging. From there, we developed a marketing plan to be implemented in the 2013/14 academic year.
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<th>Audience</th>
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<tbody>
<tr>
<td>Faculty</td>
<td>1. Increase # of submitted materials</td>
<td>The libraries can help you increase your research impact</td>
<td>1. Reach new faculty</td>
<td>1. Integrate new faculty into faculty orientation</td>
<td>3. Before and after of submissions for FY 2015/16</td>
<td>Minimal visible impact. Group who attends library sessions is small. Important to continue b/c it maintains visibility.</td>
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<td>2. Increase # of contributors</td>
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<td>1. Solicit CVs from new faculty in their first semester on campus</td>
<td>2. Before and after of contributors for FY 2015/16</td>
<td>Very successful. 24 of 51 (47%) faculty solicited sent in their CV.</td>
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<td>2. Maintain contributions from current active faculty</td>
<td>1%/4. Become involved in faculty instruction sessions that touch on the IR.</td>
<td>Minimal visible impact. Important to continue b/c it maintains visibility and raises scholarly Communication issues in the faculty's mind.</td>
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<td>2. Provide faculty with status documents on their work in the IR.</td>
<td>Very successful. 54 responses to emailed report. Sent out 442, response rate of 52%. Not only new works, but also author versions.</td>
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<td>3. Create general faculty awareness about new services</td>
<td>1%/4. Work with digitization to acquire publication citations. Once will request faculty permission to deposit.</td>
<td>Pilot started, but abandoned when pilot partner left MO.</td>
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<td>1%/4. Embed IR in new faculty EAD training.</td>
<td>Unsuccessful. New faculty EAD training is almost nonexistent. Ongoing. Deans and Associate Deans are meeting with heads of colleges. Have generated invites to present to a number of colleges/departments in fall 2014.</td>
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<td>2%/4. Meet with departments to inform them about services (new and continued).</td>
<td>Card created, end of spring semester 2014. Too early to gauge impact.</td>
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Marketing plan structure

- First had to determine the basics
  - Goal
  - Message
  - Strategies
  - Tactics
  - Assessment
A simple enough couple of goals, but the difficulty is in the execution.
Based upon survey findings. The statement encapsulates the ease of use and the impact of faculty research.
New faculty seem more open to the message. However, we need faculty who have deposited in the past to remember that we’re still here and we still want their stuff.
Instruction sessions: If it touched on or tied into the IR in any way, it was a good opportunity to remind faculty about ePubs. Sessions I was included in were: NIH Compliance, Research Impact, and I also talked to some classes.
Some tactics serve more than one strategy. Some of them will be repeated a few times.
We walk a fine line. How do we keep the IR front and center without irritating the faculty enough that they dismiss our communications. Faculty instruction sessions are a good way to put a face to the name. Status documents remind them that the IR exists, and hopefully not too obstrusively.
Meeting with departments happened as part of the initial rollout of the IR. Plans have been to partner with subject liaisons and to meet with departments with the liaisons present. At this point, we’ve been focusing on educating the subject liaisons through the Scholarly Communication Committee. However, the library Dean and one of the Associate Deans have been meeting with the deans of the various colleges.

IR services card: it’s important to have a number of leave-behinds. The IR services card allows us to keep the IR in the faculty consciousness. There is also a bookmark, and some handouts. Sadly, we don’t have the budget to get some really sweet swag.
The card reinforces ease of use, research impact and recognition through accessibility, and ties in the raising of MU’s research profile.
Tactics: Create general faculty awareness about new services

- Become involved in faculty instruction sessions that touch on the IR
- Embed Rose in new faculty FAD training
- Meet with departments to inform them about services
- Work with Coordinator of Outreach and Marketing to create an IR services card
No benchmark or baseline numbers existed before this year. Because of the changeover in staff, and the establishment of the IR, it is difficult to choose any one set of numbers and use those as the baseline. Therefore, 2013/14 is the year that will produce the baseline numbers. Success for 2013/14 will be based upon general trends in the numbers, rather than reaching a specific benchmark.
Based solely on faculty numbers. Faculty were the priority audience for the 2013/14 marketing plan. Student deposit continued during this time, but those numbers haven’t been examined in the way the faculty numbers have.
The drop in AY 2012-13 is indicative of the Digital Projects Librarian/Coordinator of Digital Programs position being empty during the hiring process. It took me about 6 months to really get my feet under me. However, AY 2013-14 was a good year when measured in terms of submissions. It continues a positive trend, when the anomalous 2012/13 AY is removed.
The first two years represent the initial push to get faculty on board. New contributors drop off after that, even allowing for the rebuilding year of 2012/13. However, the uptick for 2013/14 indicates general success for the marketing plan, probably even more so than the # of contributions does.
Status documents are sent out twice a year, once during the fall semester, and once during the spring semester. It was a successful effort, though not as much when the pure numbers are looked at. 442 status reports were sent out, and 54 faculty (or 12%) responded with additional materials, or with author versions that would allow us to load full text. While the percentage looks small, it netted a number of new submissions. Changes to our email template also netted us many more author versions than we’d received in the past. Though the response rate is small, it is worth it for the materials we do receive, and the outlay is relatively minor. New faculty CVs worked very well for us. 51 faculty were emailed, and we received CVs from 24 of them, that’s 47%. In addition, other new faculty opted in to having their current publications harvested into ePubs from the FAD. Of the 87 new faculty submitters to ePubs, 24 were from that initial mailing.
It is difficult to quantify the effect of my participation in new faculty orientation and faculty instruction sessions. However, by offering the service in conjunction with various library initiatives, the IR stays with in the faculty’s conscious. As such, it’s important to continue these efforts.
New faculty FAD training was unsuccessful. The Faculty Activities Database was rolled out a couple of years ago and faculty enter their activities as part of reporting for their annual reviews. It continues to provide us with a steady stream of research two times a year, the big training push is over. New faculty FAD training is practically non-existent and happens more on a trouble-shooting basis with the Office of Institutional Reassearch and Analysis. However, OIRA is a good partner to have for the IR, and we’ve maintained efforts to solidify that relationship.
Meeting with departments should happen in the wake of Library Dean and Associate Dean’s meetings with college deans this past summer. Education efforts of subject liaisons have been progressing slowly, but they’re integral to the process. The IR services card’s success is difficult to quantify. There are plans for a mailing to all faculty in the fall of AY 2014/15, which will generate some data on its effectiveness.
Outcomes: Pushed back until AY 2014/15

- Work with subject liaisons to acquire publication citations; DigiProg will request faculty permission to deposit
WHAT'S NEXT?
This process will need to be revisited on a regular basis, probably annually for the foreseeable future.
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<tr>
<td>Graduate Students</td>
<td>Increase # of contributors</td>
<td>&quot;Build your academic presence online.&quot;</td>
<td>Get grad students involved w/ SelectedWorks</td>
<td>Contact Graduate Student Organization to set up workshops</td>
<td>Before and after # of grad students w/ SelectedWorks accounts for AF 2014/15</td>
<td>Involve invested faculty in spreading the word to grad students.</td>
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<td>Undergraduate</td>
<td>Increase # of courses and/or instructors setting student work for submission</td>
<td>Showcase MU's richly talented undergraduates. (Goes to MU's mission on excellence in teaching.)</td>
<td>Target faculty to remind them of potential and value of including student work in IR</td>
<td>1. Conduct environmental scan of courses that would lend themselves to IR inclusion</td>
<td>Before and after # of series of student work in IR for AF 2014/15</td>
<td>2. Email department chairs to see which departments have undergrad awards and competitions.</td>
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<tr>
<td>Students</td>
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<td>3. Work in research centers and programs on campus with final components that are suitable for IR.</td>
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QUESTIONS?
For more information on the survey

- Poster (includes survey questions and results):
  http://works.bepress.com/rose_fortier/14/

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