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## **MARKETING LIBRARY SERVICES: A CASE STUDY IN PROVIDING BIBLIOGRAPHIC INSTRUCTION IN AN ACADEMIC LIBRARY**

*Libraries are similar to business firms in that both perform such functions as purchasing, production, finance, personnel management, and marketing. Unlike business firms, however, libraries have been largely passive with the marketing function. A program of bibliographic instruction at the University of Kentucky illustrates the successful application of modern marketing methods. The instruction librarian successfully created a "marketing mix" of price, product, promotion, personal selling, and distribution to meet the needs of students and faculty. Moreover, the Kentucky example demonstrates how one successful program can contribute toward marketing other library services.*

### **INTRODUCTION**

Libraries are similar to business firms in that both perform such functions as purchasing, production, finance, personnel management, and marketing. Unlike business firms, however, the marketing function in libraries has been largely passive. Librarians have directed most of their energies toward the purchasing and production functions of buying, cataloging, and circulating books. Meanwhile, librarians tend to neglect the marketing function of defining and anticipating the wants and needs of library users.

A program of bibliographic instruction at the University of Kentucky illustrates the successful application of modern marketing methods in libraries. Moreover, this example demonstrates how one successful program can contribute toward marketing other library services. The marketing function in businesses and libraries is discussed briefly below. The remaining sections of the paper will describe the bibliographic instruction program at the University of Kentucky, show how the program was successfully marketed, and illustrate the program's contribution to the marketing of other library services.

### **THE EVOLUTION OF THE MARKETING FUNCTION**

The marketing function in the business world gradually evolved from a subservience to the production function around the turn of the century, through a sales orientation in the 1930's, 40's, and 50's, to the broader present day concept. During the first stage, most firms emphasized making a quality product and hiring people to sell it. In the second

stage, the emphasis was on the quality of the sales force, backed by consumer advertising and market research. Today, the marketing function has assumed a pivotal role in many organizations, marshalling all of their resources to translate an idea for satisfying a consumer need into a product and the product into sales. Thus, the needs of the consumer have gradually become the focus of marketing activities as time passed.

Many libraries still maintain a production orientation, in which they emphasize the technical processes required to acquire and catalog the collection. Librarians have borrowed techniques from operations research (the scientific analysis and evaluation of problems) and have applied automation to library processes in an effort to make production faster and more cost effective. Some libraries have moved into the second stage of marketing evolution where use studies and advertising are used to plan and promote library services. A few libraries have even undertaken the integrated approach which characterizes the third stage. These librarians have anticipated needs for services and products and then have marshalled resources both within the library and external to it to deliver the services and products.

Third stage marketing by a library would involve several components, which in business are sometimes together called the *marketing mix*:<sup>1</sup>

1. *Product* – the qualities, characteristics, design, and packaging of the product or service.
2. *Price* – In libraries, most services do not have a monetary price, but price may also be conceived as the user's time and trouble spent in finding information.
3. *Promotion* – The advertising and publicity used to make users aware of products or services.
4. *Personal Selling* – Librarians' face-to-face interactions with users during the process of making them aware of products and helping them choose among services and methods of delivery.
5. *Distribution* – The means used to distribute a product or service to users, such as delivery to faculty, who then distribute to students as opposed to delivery directly to students. Delivery to faculty would be called "wholesaling" in the business world because the library "sells" to people who in turn deliver to the end user; direct library delivery to students would be "retailing."

In addition to making the five types of marketing decisions described above, a firm or library must determine whether resources are available to produce and distribute a product or service. It must also calculate the demand for the product and determine whether other organizations are offering similar products in a cost effective manner, i.e., in a "competitive" manner.

## ENVIRONMENT

The overall environment at the University of Kentucky was good for introducing a bibliographic instruction program. Other academic libraries were starting such programs; there was grant money available; the new director at Kentucky was innovative and service-oriented; and the faculty and administration of the university had complementary interests in the area of undergraduate instruction.

The bibliographic instruction programs at other colleges and universities across the country took several forms:

- Classroom presentations in which library staff, usually in the reference department, were invited by teaching faculty to talk about library services and resources.
- Credit courses for students taught by librarians, usually at the lower division level.

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- Slide-tape and video-tape programs available for unaccompanied viewing by library users, sometimes at point-of-use.
- Orientation tours in which large numbers of students were conducted through the building by librarians, usually in the beginning of the school term.
- Full-fledged programs with all of the above activities, conducted either by a separate library instruction department, a well-defined section of the reference department, or even by the entire library staff.

The bibliographic instruction program at Kentucky was one of several funded by the Council on Library Resources and the National Endowment for the Humanities. Kentucky's proposal had been submitted during the first year of a new library administration and the funds began to flow in August, 1974.

Meanwhile, a third-stage marketing program was implemented at Kentucky shortly after the arrival of a new director in 1973. The new director emphasized both identifying new groups of library users and improving services to those people who were already using the library. He had initiated a year-long study of library management practices (The Management Review and Analysis Program, MRAP, sponsored by the Association of Research Libraries) in order to improve the ability of the main library and its twelve branches to provide services and to identify areas for new services. The resulting report pointed out that the entire campus was moving in the direction of improving existing educational services and extending services to new groups of clients. In addition, the report recommended that the library staff periodically survey users to determine their satisfaction with library services.

At about the same time, a university-wide task force on improving undergraduate education recommended the establishment of an Office of Instructional Development that would provide support, information, and consulting services for faculty. The recommendation was evidence of faculty and administrative concern over the quality of undergraduate teaching at the university.

### THE PROGRAM IN BIBLIOGRAPHIC INSTRUCTION

The C.L.R./N.E.H. grant proposal specified a program of undergraduate instruction in the social sciences and humanities. Within the general guidelines provided by the project's objectives (Exhibit 1), library staff designed a program with the following components:

1. A sequence of three instructional units for the freshman English classes. The first unit described the card catalog, the second the periodical indexes, and the third the reference collection (Exhibits 2-4). The units were self-instructional materials in printed form, written by library staff and presented to the classes by graduate student instructors in the English department.
2. A printed, self-instructional unit for history students which introduced reference materials of potential interest to historians (Exhibit 5).
3. Orientation tours to acquaint new students with the facilities and services available in the campus libraries.
4. Directional signs and self-guided tours. The signs were both painted on library walls in bright colors and posted above service points.
5. Guidebooks to the library, suitable for students, faculty, staff, and visitors (Exhibit 6).
6. Bibliographic instruction materials printed in the student newspaper.
7. Talks and bibliographies for individual classes on library facilities appropriate in a certain subject area, such as journalism.

**EXHIBIT 1**

**Objectives for Instructional Program**

1. Expand the reference and instructional capacity of the University Libraries through programs that bring specialized library resources and services to students and academic staff.
2. In cooperation with the teaching faculty, relate library resources to University instructional and research activities through educational programs directed toward the effective use of the Libraries' resources.
3. Promote the provision of direct assistance to students and academic staff through in-depth reference work applied to specific research and instructional projects
4. Increase the effectiveness of reference service by coordinating the utilization of library personnel for in-depth reference services to undergraduates and the instructional staff in the social sciences and humanities.
5. Develop the capability among students and academic staff to make effective use of library resources in general.
6. Increase the awareness of bibliographic tools and research techniques among students and academic staff.
7. Increase the familiarity of students with Kentucky's library collections.
8. Aid students and staff in a systematic way to keep up with the literature in their fields of interest.
9. Allow selected faculty to receive regularly, materials of potential value in their instructional work.

(From: Appendix A, Proposal to the Council on Library Resources.)

EXHIBIT 2

*In 1970 Tony Bellus played an electric  
accordion fifty hours at a Holiday  
Inn in Oakbrook Terrace Illinois*

901.94 Fuller, Richard Buckminster, 1895-  
F9595 Utopia or oblivion: the prospects for humanity by, R.  
Buckminster Fuller. / Toronto, New York, Bantam Books  
(1969) /

xi, 366 p. illus. 18 cm. (Bantam Matrix editions QM5263) 1.25  
C\*\*\*

Bibliography: p. 365-366.

✓ 1. Civilization, Modern--1850-      ✓ 1. Title.

TITLE STATEMENT AND AUTHOR

IMPRINT

PLACE:  
TORONTO and NEW YORK  
PUBLISHER:  
BANTAM BOOKS  
DATE OF PUBLICATION:  
1969

EXHIBIT 3

THE  
TAMING  
OF  
THE  
DINOSAUR:  
A KEY  
TO  
LIBRARY  
RESOURCES

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UNIT 2... SOURCES OF CURRENT INFORMATION  
LOCATING PERIODICAL AND NEWSPAPER ARTICLES

EXHIBIT 4

Reference sources which contain actual articles may be, as previously stated, universal in scope or limited in some way. Universal biographies are those which do not limit their entries by geography or profession. Rather, selection of entries is based upon sufficient fame or notoriety. CURRENT BIOGRAPHY and WHO'S WHO IN THE WORLD are in this category.

CURRENT BIOGRAPHY articles begin with an address through which the person may be reached.

STEWART, ELLEN

Theatrical producer  
Address: La Mama Experimental Theatre Club,  
74A E. 4th St., New York 10003

The course of contemporary theatre has been irrevocably changed by a handful of daring companies in that theatre's noncommercial avant-garde, known as Off Off Broadway. The contributions of such groups as Theatre of Living Arts, Judson Memorial Church, the C...

They end with references for further study.....

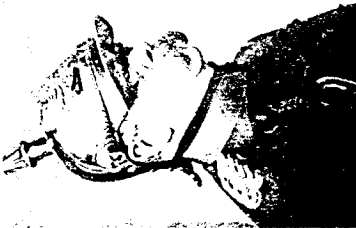
...out in fact he is ... developed sense of humor as an expert teller of deadpan jokes." In Time (December 6, 1971) his wit was characterized as "refreshingly acerbic." For recreation he turns to music, reading, the theatre, and an occasional game of golf.

References

- Esus W p76 D 4 '71 por
- N Y Post p22 D 4 '71 por
- N Y Times p30 N 25 '71 por; p20 F 18 '69
- Time 98:25 D 6 '71 por
- U S News 65:10 D 30 '68 por
- Washington Post C p7 Ag 27 '68 por
- Who's Who in America, 1972-73
- Who's Who in World Jewry (1965)

*Mr. and Mrs. Benjamin Nottingham*  
*announce that the marriage of their daughter*  
*MARY KATHERINE*  
*to*  
*MR. JERROLD ATHERTON*  
*will not take place*

EXHIBIT 5



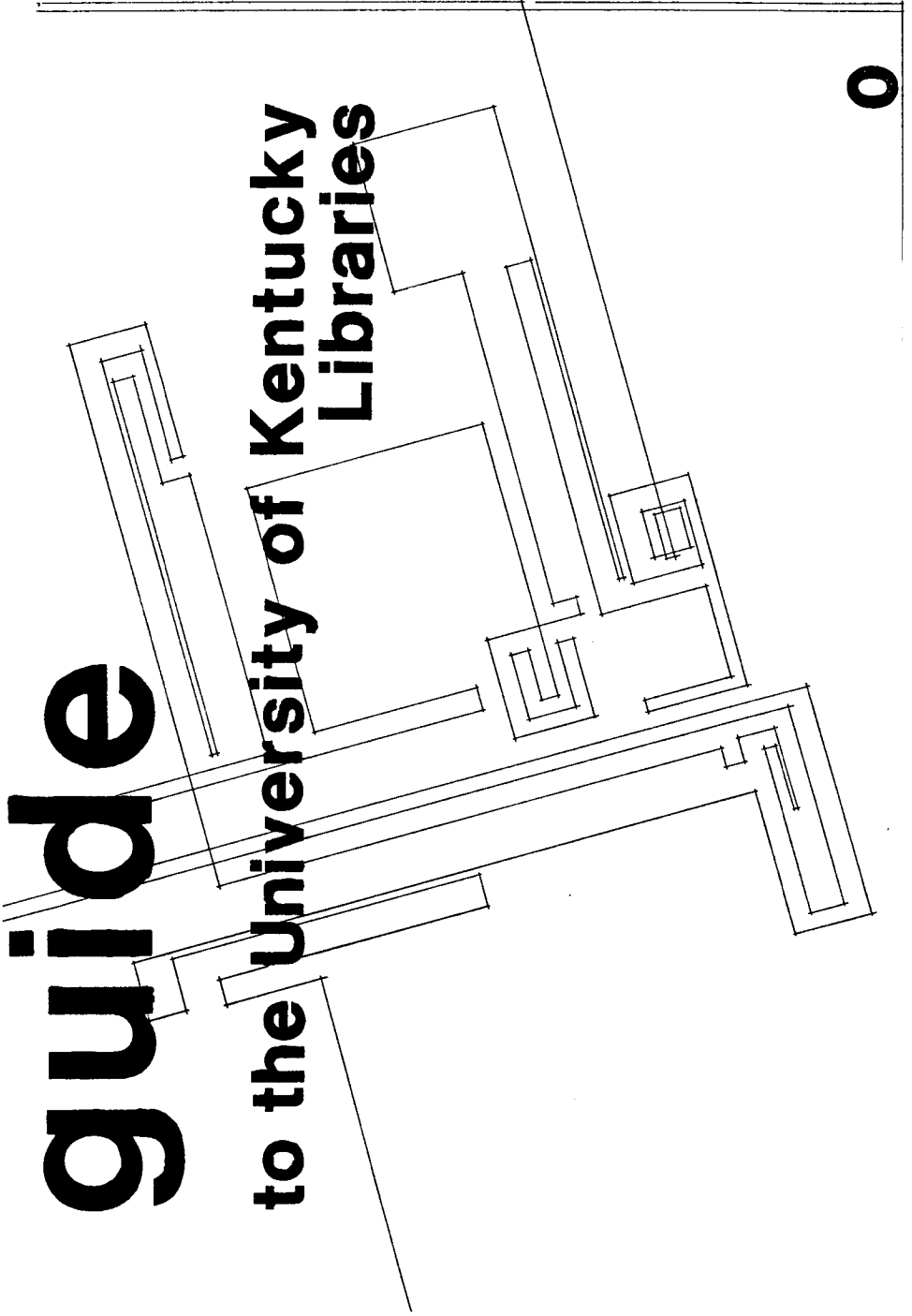
REPRODUCED BY PERMISSION OF THE  
GERICKE-MUSEUM, MAGDEBURG, GERMANY

# "How Do You Spell Bismark?"

*a primer of  
Historical Reference Material  
in the Library*

*by Raymond F. Betts  
Professor of History*





Exhibits 7 through 9 show the numbers of students served in various academic areas and at various levels of sophistication. Subject areas ranged from the theoretical (anthropology, English, history) to the practical (social work, merchandising). Levels of sophistication ranged from freshman composition classes to graduate and professional students writing theses or dissertation.

## EXHIBIT 7

**Comparison by Month of the Total Students Involved in  
Instructional Activities with the Previous Grant Year**

<i>1974/75</i>	<i>Month</i>	<i>1975/76</i>
<i>Number of Students</i>		<i>Number of Students</i>
0	July	50
230	August	165
435	September	300
40	October	2415
230	November	971
0	December	0
125	January	358
700	February	2187
315	March	500
75	April	40
0	May	0
59	June	60
<hr style="width: 20%; margin: 0 auto;"/>		<hr style="width: 20%; margin: 0 auto;"/>
2209	TOTALS	7046

From: Second Annual Report to the Council on Library Resources

## EXHIBIT 8

**Breakdown of Students Involved in Instructional Activities in 1975/76 by Levels**

<i>Numbers of Students</i>	<i>Level</i>	<i>Description</i>
2966	Orientation	Tours to acquaint new students with the library, regardless of class level.
3452	I	Freshman composition classes; emphasis on term paper writing.
246	II	Beginning work in students' major subject area
344	III	Advanced (junior/senior) students writing documented papers in major subject area
38	IV	Graduate and professional students writing theses or dissertations.
<hr style="width: 20%; margin: 0 auto;"/>		
7046	TOTAL	

From: Second Annual Report to the Council on Library Resources

## EXHIBIT 9

**Colleges and Departments with Course Numbers and Descriptions  
Served by the Instructional Program**

<i>Colleges</i>	<i>Departments</i>	<i>Course Numbers and Descriptions</i>
Architecture	—	ARC 810, Architecture Studio; ARC 820, History of Architecture and Urban Forms; ARC 830, Structures and Environmental Controls; ARC 850, Professional Practice. (Student takes these courses during his/her senior year.)
Arts and Sciences	Anthropology	ANT 605, Seminar in Method and Theory in Anthropology.
	English	ENG 101, Freshman Composition; ENG 102, Advanced Freshman Composition; ENG 105, Advanced Freshman English, Writing on Special Topics; ENG 203, Writing for Business and Industry.
	History	HIST 105, History of Europe, 1713 to the Present; HIST 316, Junior Seminar, Historical Method and Literature.
	Human Communication	SP 181, Basic Public Speaking; SP 288, Oral Interpretation; SP 488, Interpretation of Poetry.
Home Economics	Journalism	JOU 203, Principles of Newswriting; JOU 204, Writing for Mass Media; JOU 501, Newsreporting.
	Textiles, Clothing and Merchandising	TC 592, Special Problems in Clothing and Costume Design: Bicentennial Dress—Research, Design and Construction of Dress of the American Revolution.
Social Professions	Social Work	SW 124, Introduction to Social Services; SW 222, Development of Social Welfare; SW 322, The Social Work Profession and Social Welfare; SW 630, Social Welfare Policies and Services.

*Course Numbering System*

- 100-199 Open to freshmen
- 200-299 Prerequisite sophomore classification
- 300-399 Prerequisite junior classification
- 400-499 Prerequisite junior classification
- 500-599 Prerequisite junior classification
- 600-799 Open only to graduate students
- 800-999 Open only to professional students in professional colleges

From: Second Annual Report to the Council on Library Resources

These products were produced by the Instructional Services (IS) department in the library, newly created in August 1974. The department consisted of a full-time librarian and several part-time graduate students in library science, law, and communications. The

librarian designed the program, made campus-wide contacts, edited and supervised the work of the students, and "sold" the instructional program to the faculty. The students both wrote the instructional units described above and conducted library tours. In addition to the regular students, other people helped on special projects, for example:

1. The teaching assistants in the English department distributed and presented the three instructional units to their freshman English sections concurrently with instruction in term paper writing. These instructors could demonstrate the relevance of specific library resources to those topics selected for the students' papers.

2. To produce signs and graphics for the printed materials, the Instructional Services department hired architecture students for short periods of time or paid them lump sums for specific projects.

3. Staff from other library departments volunteered their time (sometimes during their off hours) to give talks and prepare bibliographies for classes and to lead general library tours for new students.

### THE MARKETING MIX OF THE BIBLIOGRAPHIC INSTRUCTION

The bibliographic instruction program met the needs of students for learning to find information by successfully combining the five components of the marketing mix.

The product of self-instructional printed materials was designed to reach large numbers of students at low cost and to provide a method of instruction which could be continued after grant funds ceased. Each unit was divided into sections that provided students with information necessary to conduct library research on a topic of interest. Unit I covering the card catalog was divided into four sections: Parts of the Card Catalog, Location of Material, Subject Card Catalog, and Basic Filing Rules. Each section was followed by a series of questions that when answered summarized all relevant knowledge that the student needed about the card catalog and the organization of material in the main library building. Unit 2 followed the same format, but covered the use of periodicals, periodical indexes, newspapers and newspaper indexes, and so on.

The "price" of bibliographic instruction to the instructors and students until January of 1978 was the time and trouble of acquiring it. After that date, students had to purchase the 70-page units in the university bookstore for 72¢ each. For the instructors, the price consisted of two class periods spent covering the units. A third period was devoted to a library tour led by library staff. The price for students (prior to January 1978) was not much more time than they would have spent attending English class. Furthermore, the students' effort on library work was an "investment" in their term paper grade.

During the first two years of the grant period, the library budget paid for printing all instructional materials except those printed in the student newspaper. However, because the library did not have enough money in its 1977-78 printing budget to pay for the instructional units, the library director arranged for the campus bookstore to pay the 57¢ per unit printing costs and sell the units at a 15¢ mark-up. Thus, the price became concrete in monetary terms. None of the library preparation costs were included in determining the selling price, and the library received no money from any sales. (See Exhibit 10 for a breakdown of costs for the freshman English program in 1976.)

There was no need for promotional activities for the bibliographic instruction program, since the students (consumers) were a "captive" market. They could not avoid taking freshman English and thus required no advertising or displays to lure them into obtaining bibliographic instruction. The program succeeded by using personal selling to gain the cooperation of the faculty.

## EXHIBIT 10

Costs of the Freshman English Instructional Program as Implemented in Spring 1976<sup>1</sup>I. Development Costs<sup>2</sup>

## Library staff salaries

Professional (¼ year @ \$14,300 per annum)	\$10,725.00
Part time staff (3240 hours @ \$2.26/hour)	<u>7,290.00</u>

Total development costs	\$18,015.00
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## II. Operational Costs

## Initial preparation

Professional and student staff time for packaging units and scheduling tours (320 hours @ \$4.69/hour on the average)	1,500.00 est.
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## Printing

Instructional units (4,000 copies of each unit @ 17¢/copy)	2,000.00
Pretests/posttests (4,000 copies of each test @ 2¢/copy)	<u>24.00</u>

Total printing costs	2,024.00
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## Tours

Staff time for leading tours (218 hours @ \$2.26/hour)	490.50
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## Evaluation

Staff time for compiling results of tests and questionnaire (39 hours @ \$4.69/hour)	182.91
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TOTAL OPERATION COSTS	\$ 4,197.41
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OPERATIONAL COSTS PER STUDENT	1.62
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OPERATIONAL COSTS PER CLASS	40.50
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1. Includes the following: Distribution of three instructional units and guided tours for 13 freshman English classes (325 students).
2. Does not include volunteer assistance from the Director of the freshman English program and nine English instructors.

It was the IS department head who "sold" the faculty on the idea of a partnership in improving bibliographic instruction. He developed a peer relationship with faculty members on several university-wide committees, to which he had been appointed through the influence of the library director. Examples were the Advisory Council on Continuing Education and the Freshman Year Committee. Through such committees, the librarian met one man who authored the instructional unit for history students and another who provided free audio-visual services to the instructional program. The librarian's collaboration with the Chairman of the Freshman English program, whom he met by simply paying a "sales call," was so successful that not only did the English professor offer

guidance on the bibliographic instruction units, but he later requested the librarian to review a chapter on the library in one of his textbooks for freshman English students.

The bibliographic instruction units were distributed through the English instructors rather than directly to the students. In addition to making the units accessible to more students than if the librarians had taught them, this method allowed the instructors to present the material in their own way and avoided the need for a promotional effort. Thus, the librarians were viewed as consultants rather than as competitors, aiding and supplementing the English program rather than offering an independent course on term paper research.

In addition to developing a successful marketing mix for the bibliographic instruction program, the IS librarian mobilized resources within the library and on campus to produce and deliver the program successfully.

### **The Bibliographic Instruction Program as Part of the Library's Marketing Effort**

As part of the total library effort to expand services under the new director, the bibliographic instruction program influenced new products and services, provided publicity, and helped identify new resources for producing services. Some examples of the role of the IS department and its program are given below:

1. New Products and Services
  - Because of his involvement with the university Advisory Committee on Continuing Education, the IS librarian prepared a grant proposal to involve the library in support for university continuing education programs.
  - Staff in the IS department prepared a guide to microfilms in the main library because staff members themselves found the collection difficult to use.
  - When the library director offered study space in the library for the athletic teams, the IS staff gave introductory tours to the players.
  - In collaboration with the university media services department, IS staff prepared video tapes of periodical indexes to be used by the library reference staff.
  - IS staff advised the library director on how to set up a library unit which would disseminate information on university academic services, such as tutoring.
2. Improving Existing Services
  - Under the direction of IS staff, brightly colored directional signs were painted on the walls of the main library.
  - IS staff provided feedback from library users to the circulation department. The English department instructors and students, as well as people who participated in general tours and classroom presentations, told the IS staff that the circulation desk personnel could be more responsive and that books should be shelved more quickly.
  - IS staff also made suggestions to the collection development department regarding purchase and replacement of widely used material. The English instructors and students researching term papers reported the need for duplicate copies.
  - IS staff worked with the reference librarians to develop a list of popular term paper topics so that when students complained to the reference staff about lack of materials on a topic, the librarians could steer them to other topics.
3. Publicity
  - The IS department became heavily involved in general publicity for the library. The “dinosaur” logo (Exhibit 11) developed by IS staff for the instructional units helped to counteract the dull, stodgy image of the library. The theme of “taming the dinosaur” was apt. The library system with its 1.3 million volume

EXHIBIT 11  
Dinosaur Logo



the end

collection, twelve branch libraries, and multiple sets of regulations, was both large and formidable.

- Since the main library, having just undergone a major expansion and renovation, was unusually large and confusing, there was a pressing need for directional signs, guidebooks, floor plans, and favorable publicity. The IS department was extensively involved in providing materials and services designed to tame this monster. Because of its graphics and writing expertise, the IS department was for two years the main provider of newspaper articles on the library and guidebooks for library users. For example the IS staff prepared guidebook material on the library for the information packets given to all new students. Some of this material was published in the student newspaper.

#### 4. New Resources

- Because of its contacts all over campus, the IS department identified and used campus resources not normally available to work on library projects. For example, history department faculty and communications department students both served as writers for the instructional units. The former was free, the latter for nominal wages.
- Technical aspects of the video-taping project mentioned above were carried out free by the university media services department.
- Architecture students were recruited for nominal wages to design and paint directional signs.
- Library science students worked part-time in the IS department performing a range of tasks including typing, paste-up, writing, giving tours, compiling the results of evaluative questionnaires.

### THE FUTURE

Based on the criterion of repeat business, the bibliographic instruction program was successful. The freshman English programs were repeated each year, and other disciplines became involved at various levels until in its third year the program reached 8500 students in more than eight departments. Positive comments from both students and instructors on questionnaires at the end of the bibliographic instruction sessions also revealed that the program was well received. One of the English graduate instructors became so involved and enthusiastic about the program that she maintained ties with IS staff even after she graduated and took a permanent position at a college nearby.

By the above criteria, then, the program was a success. However, to determine whether the program had lasting and significant impact on the ability of students to find information, the IS department would have had to do a longitudinal study on the students' college and professional careers. Unfortunately, a study of this sort is beyond the means of most institutions.

After three years, bibliographic instruction is firmly established at Kentucky. As a result, when the C.L.R./N.E.H. grant ended, the library director was determined to carry on the program. In the process of disbanding the IS department, he transferred the bibliographic instruction program to the reference department and the IS librarian became head of the circulation department.

The pace of change in the library has slowed. One wonders whether the lack of personnel whose specific responsibility and talent is in stimulating library-faculty partnerships will cause the program started by the IS department to slide back into the old passive marketing mold. With bibliographic instruction assimilated into the reference department (where librarians have desk duty and are being encouraged to write professional papers), the recruiting, training, and encouragement of an instructional "sales force" will take



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low priority. However, since the value of bibliographic instruction and other marketing devices have been demonstrated at least in the business sense, both will probably continue in some form.

### REFERENCE

1. David P. Kollatt, *et al. Strategic Marketing*. (New York: Holt, Rinehart and Winston, 1972).