A Campus-Wide Campaign to Increase Undergraduate Utilization of the Special Collections Research Center

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Executive Summary

Morris Library is located in the center of the Southern Illinois University Carbondale campus. The library serves 10,987 undergraduates, 2,957 graduate students, and nearly 2,800 faculty and staff.1

Southern Illinois University Carbondale is located in Jackson County. The 21 July 2017 population estimate of the county was 58,284.2 The city of Carbondale’s population in 2017 is outlined in the following chart:3

<table>
<thead>
<tr>
<th>Population by Race and Gender</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>13,742</td>
<td>12,160</td>
<td>25,902</td>
</tr>
<tr>
<td>White</td>
<td>9,005</td>
<td>7,164</td>
<td>16,169</td>
</tr>
<tr>
<td>Black or African American</td>
<td>3,053</td>
<td>3,583</td>
<td>6,636</td>
</tr>
<tr>
<td>Asian</td>
<td>806</td>
<td>660</td>
<td>1,466</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>758</td>
<td>652</td>
<td>1,410</td>
</tr>
<tr>
<td>Two or More Races</td>
<td>454</td>
<td>413</td>
<td>867</td>
</tr>
<tr>
<td>Some Other Race</td>
<td>365</td>
<td>282</td>
<td>647</td>
</tr>
</tbody>
</table>

Within Morris Library is the Special Collections Research Center (SCRC), founded in 1956.4 The SCRC holds 84,000 rare books and 20,600 linear feet in archives and manuscripts,5 all of which complement and enhance the curricula and programs at the university.6

<table>
<thead>
<tr>
<th>Special Collections Holdings</th>
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<tbody>
<tr>
<td>Rare Books</td>
<td>84,000</td>
</tr>
<tr>
<td>Archives and Manuscripts</td>
<td>20,600 linear feet</td>
</tr>
</tbody>
</table>

Mission of the SCRC: “The Special Collections Research Center (SCRC) of the Morris Library at Southern Illinois University Carbondale (SIU) collects and preserves unique and rare historical

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materials in selected subject areas, and promotes the use of these materials by Southern Illinois University Carbondale students and faculty, visiting scholars, and the wider public. Our goal is to advance scholarship and further the educational, research, and service missions of the university.”

Within the mission statement is an impetus to promote the use of the materials in the SCRC with the goals of furthering research, education, and scholarship. In order to determine whether or not this goal was being met we examined awareness of the existence of the SCRC and have created a marketing plan not only to enhance awareness but also to increase use of the unique materials found in the SCRC by undergraduate students.

This document outlines the research, foundation, marketing plan, and materials to be used in the outreach campaign. The process is as follows:

Determine the needs of the audience through surveys and focus groups

Apply this information to tailoring a promotional campaign aimed at raising awareness of the SCRC and its contents through flyers and other printed materials, an open house, classroom visits, social media, and displays in various locations on campus

Encourage use of the materials in the SCRC through offering digital badges to students

**Theoretical Foundation**

In their article, “Use of Special Collections as an Opportunity for Outreach in the Academic Library,” Harris and Weller write, “A common type of special collections outreach in the academic setting is that of special collections librarians working with professors to highlight relevant collections within special collections and to instruct students how to find, access, and use primary sources most productively.” In addition to working with professors, Harris and Weller suggest that there are other ways to draw attention to special collections:

Less obvious, but possibly equally effective is for special collections staff to identify ways to make the collections visible on campus by, for example, participating in student orientation programs, having prominent exhibit spaces that regularly highlight important collections, using campus news media to feature exhibits and collections, hosting receptions, talks, or seminars for academic events, working with development officers to promote collections, and collaborating with other library departments in their teaching programs.

Of special importance for this project, the authors note that most of the literature regarding outreach in libraries does not always focus specifically on users of special collections.

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7 Ibid.
9 Ibid., 296.
Instead, special collections is sometimes wrapped in a larger question about library services in general: “While some library users’ surveys include questions about use of special collections, there are only a few studies that focus solely on special collections users.”

Despite the paucity of information about users themselves, it is clear that the role of special collections, and primary sources, is important. Harris and Weller discuss several studies in which the use of primary sources and special collections outreach proved beneficial. One such study included teaching “archival orientation sessions in four undergraduate history classes.” Surveys of the participants indicated use of special collections rose from 59.4% to 70.5% after the orientation sessions, including use of the photograph collections. While this study targeted history students specifically, the outcomes are clear.

In “Selling the College and University Archives: Current Outreach Perspectives” Tamar G. Chute writes:

> In today’s reality of stakeholders, dwindling resources, relevance, and accountability, institutions of higher learning are now forced to scrutinize every aspect of their academic communities. Each department and every program on campus is being asked to prove its worth. To this end, archivists must seek ways to justify and validate their existence, including expanding their customer base. Faculty, staff, and students need to know more about their college and university archives.

Some of the archivists interviewed for Chute’s study define outreach as “anything that puts the archives and the archivist in contact with the public.” This broad definition certainly leaves room for a variety of outreach activities and includes “placing written materials or exhibits at various locations around campus. Contact with materials clearly identified with the archives can leave an individual with a positive appreciation of the archives and what it has to offer.”

Chute’s article brings up a salient point in noting that at colleges and universities it is vital to understand your target audiences—faculty, students, and staff. These audiences have very different needs and Chute astutely notes that it is best to target each group separately. The focus of our campaign is the undergraduate student population and Chute notes that “because students represent such a large part of the campus community, and because they will impact the school long after they depart, efforts at increasing student awareness and use of the archives must be important goals.”

Outreach to undergraduate students can include:

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10 Ibid.
11 Ibid., 297.
12 Ibid.
14 Ibid., 36.
15 Ibid.
16 Ibid., 38.
17 Ibid.
[teaching] students about the history of the university, give instruction on the use of materials, or even show how to get Dad a photograph of a famous football player. Many colleges and university administrations today emphasize the need to improve the undergraduate experience. Creating programs that increase student awareness of the archives may enrich that experience and foster students' curiosity and interest in their surroundings.18

Among the other outreach efforts described by Chute is one by Margery Sly, archivist at Smith College. Sly “gave presentations to many classes and used examples from the collections to teach students how to use primary sources. One of her objectives was to show students the relative value of the material as evidence.”19

In addition to teaching, exhibits can make an impact on target audiences. Chute writes, “All of the archivists interviewed for this study create exhibits of one kind or another, usually displaying them in multiple places or reusing them for other groups of view.”20 These exhibits can be occasional or on a more consistent basis. One of the keys to making the most of exhibits, however, is their location. Chute notes an example at the University of Illinois where an exhibit was placed in the hallway leading to the vending machines.21

In his article, “Public Services and Outreach in Rare Book, Manuscript, and Special Collections Libraries,” Daniel H. Traister notes that special collections libraries are the most “difficult and forbidding” parts of a library.22 Part of the reason for this is the fact that stacks are closed. Patrons are not allowed to browse freely. Some improvement has been made through the digitization of many collections, but as Traister writes, “Our readers tend to remain astonishingly less skilled than we like to imagine them at using tools that represent books rather than books themselves.”23 I would surmise that this statement would hold even more true for manuscript collections.

Another barrier, according to Traister, is the special collections staff.24 While some staff have made a concerted effort to be more welcoming to students and other patrons, not all libraries have succeeded. For those who have made changes, part of the impetus for these changes is the relatively new impetus placed on promotion within special collections and rare book libraries. Other types of libraries have been promoting themselves since the beginning of time, but this is a relatively new idea for special collections.25 Traister writes, “We are now expected to get it, catalog it, and promote it.”26

18 Ibid.
19 Ibid., 39.
20 Ibid., 41.
21 Ibid.
23 Ibid.
24 Ibid., 88.
25 Ibid., 89.
26 Ibid., 88.
McNally

Traister wisely notes the economic reasons for promotion of special collections—“Directors fear, not entirely without reason, that institutional administrators may feel that a resource not used or clearly underused in relation to the costs required to maintain it really is unnecessary.”27 This scenario is more true for special libraries than the main academic library since main academic library collections are more general and used a good deal more than a special library collection.

As we know, promotion can take a number of different avenues. As in the articles described above, Traister also suggests exhibits as a feasible means of promoting a collection. However, he takes it a step further and advocates for student or faculty involvement in mounting the exhibition and creating promotional materials. He writes,

> It enables them to become familiar with materials specifically relevant to an exhibition’s topic. ... As an additional dividend, they may also become familiar with staff, with procedures, with the care and handling of rare materials, and with the exigencies of explaining such materials to their peers, to their students, or to a “general audience.” As a result, they should become comfortable in the collection and with its staff.28

While out of the scope of this current project, Traister proposes that special collections staff either teach on their own, or share the duties of teaching classes. He writes,

> In jointly taught classrooms, the setting itself requires collegial equality rather than maintenance of an implicit faculty/librarian hierarchy of deference. When the librarian is a class’s sole instructor, students and faculty who might simply assume, without much thought, the naturalness of that hierarchy can see librarians as participants in the educational process in ways that do not simply relegate them to the role of “servants of the servants of God.” Even with respect to apparently minor details—facilitating the ongoing use of rare materials in the daily work of a classroom, as opposed to one-time class visits to a collection—such classes become an aspect of promotion for varied useful ends.29

> The key phrase in this passage for this current campaign is “facilitating the ongoing use of rare materials in the daily work of a classroom.”30 That is the ultimate goal here. It would take a lot of concentrated time and effort to successfully launch a full-fledged coteaching system, therefore the focus at this time is trying to educate undergraduate students about the

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27 Ibid., 89.
28 Ibid., 91.
29 Ibid., 92.
30 Ibid.
materials in the SCRC, which may take the form of SCRC staff in the classroom, classes visiting the SCRC, and certainly cooperation from faculty.

Traister does acknowledge that one-time presentations to classes are also valuable in promoting the rare book/special collections library. He suggests choosing materials relevant to the topic of the class and offering some basic bibliographic instruction on how to use the collection at the library. He acknowledges that these show-and-tell situations may be initiated by an instructor, or by the library staff. In cases where the library staff’s offer is declined, Traister writes that the act of proposing the idea may plant a seed that grows into acceptance at a later time.

Along a similar line as a one-time class visit is an open house. Part of the promotion for the Primary Document Sources (PDS) campaign is to hold an open house in the Special Collections Research Center. This is a way of showcasing some of the more unusual or interesting items held in the collection and provides an opportunity for faculty, staff, and students to visit the SCRC and make a connection with its staff.

This type of open house was very successful in raising awareness of the rare book collection at the University of Maryland’s Architecture Library. The staff held an after-hours event showcasing some of the more sturdy monographs and even printing plates. Faculty of the School of Architecture and students of the program were invited. Visitors were allowed to touch the items, hence why these needed to be sturdier. This event not only raised awareness about the collection, but also fostered mutual good will and interest in using the collection for class assignments.

**Market Audit and Research**

**Analysis: Current and Potential Library Customers**

There are currently 10987 undergraduate students at Southern Illinois University. There are a wide variety of majors offered and the following chart indicates the number of degrees awarded in each major from July 1, 2015 and June 30, 2016. The number reflects the percentage of majors.

<table>
<thead>
<tr>
<th>Category</th>
<th>Associate</th>
<th>Bachelor’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td></td>
<td>4.8</td>
</tr>
</tbody>
</table>

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31 Ibid., 97.
32 Ibid.
<table>
<thead>
<tr>
<th>Field</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural resources and conservation</td>
<td>1.3</td>
</tr>
<tr>
<td>Architecture</td>
<td>1.5</td>
</tr>
<tr>
<td>Area, ethnic, and gender studies</td>
<td>0.1</td>
</tr>
<tr>
<td>Communication/journalism</td>
<td>4.7</td>
</tr>
<tr>
<td>Communication technologies</td>
<td></td>
</tr>
<tr>
<td>Computer and information sciences</td>
<td>2.5</td>
</tr>
<tr>
<td>Personal and culinary services</td>
<td>0.8</td>
</tr>
<tr>
<td>Education</td>
<td>12.9</td>
</tr>
<tr>
<td>Engineering</td>
<td>5.9</td>
</tr>
<tr>
<td>Engineering technologies</td>
<td>8.3</td>
</tr>
<tr>
<td>Foreign languages, literatures, and linguistics</td>
<td>0.7</td>
</tr>
<tr>
<td>Family and consumer sciences</td>
<td>0.8</td>
</tr>
<tr>
<td>Law/legal studies</td>
<td>0.7</td>
</tr>
<tr>
<td>English</td>
<td>2.2</td>
</tr>
<tr>
<td>Liberal arts/general studies</td>
<td>1.6</td>
</tr>
<tr>
<td>Library science</td>
<td></td>
</tr>
<tr>
<td>Biological/life sciences</td>
<td>3.9</td>
</tr>
<tr>
<td>Mathematics and statistics</td>
<td>0.3</td>
</tr>
<tr>
<td>Military science and military technologies</td>
<td></td>
</tr>
<tr>
<td>Interdisciplinary studies</td>
<td>1.6</td>
</tr>
<tr>
<td>Parks and recreation</td>
<td>4.2</td>
</tr>
</tbody>
</table>
Based on the above chart, most degrees are awarded in fields that may not traditionally feel special collections is useful to their work. Those percentages above 5 include: Education 12.9,
Engineering 5.9, Engineering Technologies 8.3, Social Sciences 6.4, Health Professions 7.7, and Business/Marketing 8.8. Majors that may be more traditionally associated with using special collections make up only a small percentage of the awarded degrees: History 0.8, English 2.2. This is not to say that other disciplines do not use special collections, but these disciplines might be the most commonly thought of to use the resources.

Competitors

The Special Collections Research Center does not have any competition outside or within the university setting. There is a public library in the city of Carbondale, home to the university, but it does not hold any kind of manuscript collection or other type of rare collection. For local history or genealogy, there is the Jackson County Historical Society, but its collections focus specifically on local and county history and family records, not manuscript collections or rare books. Also, the collection is limited in scope, whereas the SCRC’s collections are broader and are aligned with university disciplines.

Library Objectives, Programs, and Current Marketing Activities

The Special Collections Research Center is part of Morris Library, the university library. The mission and objectives of the SCRC are:

The Special Collections Research Center (SCRC) of the Morris Library at Southern Illinois University Carbondale (SIU) collects and preserves unique and rare historical materials in selected subject areas, and promotes the use of these materials by the SIU community, scholars, and the public. Its goal is to advance scholarship and further the educational, research, and service missions of the university.34

The mission of Morris Library is:

Morris Library is the heart of SIU’s educational commitment. Library Affairs supports the University’s mission by providing resources, services, and facilities to enhance student recruitment, retention, and success and to invigorate faculty teaching, research, and service. We collect, preserve, and make accessible the university’s records and our unique and rare materials. We provide information literacy instruction and foster intellectual growth and innovation, while helping to fulfill the information needs of the greater community.35

Further, the SCRC website lists their goals for outreach and curriculum support:

Outreach and Access

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SCRC is committed to outreach activities that further the awareness, development and use of its materials. Outreach includes presentations, lectures, tours, workshops, and brochures. It also includes classes that provide general information to undergraduate and graduate students on the use of primary research materials as well as specific information on the holdings of the department. SCRC also prepares in-house and traveling exhibits to inform the university and larger public. Outreach aimed specifically at the scholarly community includes publishing notices of collection openings and articles about collections in professional journals, submitting bibliographical information about the collections to national cataloging databases, and increasing SCRC's internet presence.

Curriculum Support

The collections support both undergraduate and graduate curricula and programs at SIU. The collections program also provides support for University policy makers and program administrators.36

The SCRC is not currently employing any marketing activities.

Environmental Scan

A PEST examination of the SCRC reveals the following:

Political/Legal Factors. The SCRC has no political or legal issues. There are no political or legal issues associated with this marketing campaign to increase awareness and use of the SCRC.

Economic Factors. Economic factors loom large for the SCRC. The university has suffered from declining enrollment for the last several years. The chart below demonstrates the numbers for the last 6 years. (FTE=Full-Time Enrollment)

<table>
<thead>
<tr>
<th>Fall Semester</th>
<th>On-Campus</th>
<th>Off-Campus</th>
<th>Total Enrollment</th>
<th>FTE Enrollment</th>
<th>% Change Total Enrollment</th>
<th>% Change On-Campus Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>16804</td>
<td>2043</td>
<td>18847</td>
<td>15720</td>
<td>-4.9%</td>
<td>-5.7%</td>
</tr>
<tr>
<td>2013</td>
<td>16277</td>
<td>1687</td>
<td>17964</td>
<td>15208</td>
<td>-4.7%</td>
<td>-3.1%</td>
</tr>
<tr>
<td>2014</td>
<td>16216</td>
<td>1773</td>
<td>17989</td>
<td>15326</td>
<td>0.1%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>2015</td>
<td>15378</td>
<td>1914</td>
<td>17292</td>
<td>14779</td>
<td>-3.9%</td>
<td>-5.2%</td>
</tr>
</tbody>
</table>

36 Ibid.
In addition to lower enrollment, the university faced great financial challenges during the Illinois State budget impasse from 2015 to 2017. Along with social services, K-12 schools, and other state-funded agencies, higher education in Illinois suffered greatly. State funds were essentially cut off and the university had to find ways to function without this money. This resulted in the closure of a number of university programs and layoffs of nontenure track faculty and staff associated with program reductions and the closure of centers of research.37 In addition, Morris Library had to cut hours and stop subscribing to a large number of journals in order to keep within their budget restrictions.38 For special collections the budget cuts have meant not filling vacant positions and sharing the director with the university museum. The museum had been closed due to budget cuts but was reopened with the director of special collections also taking on the role of director of the museum.39

Social Factors. The decline in student enrollment falls in two categories — economic and social. It is economic because students bring in tuition and tuition helps fund the university. It is social because students are the very heart of the university. They are its reason for existing. For this campaign, specifically, undergraduate students are our target.

Technological Factors. The SCRC has a website but it is not as user-friendly as it could be. There have been discussions about revamping the website and adding more tutorials and other kinds of resources. The site does offer access to SCRC’s online collections and finding aids. Patrons can also access the SCRC’s large photograph

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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>McNally</td>
<td>504</td>
<td>12408</td>
<td>516 2189</td>
<td>528 14554</td>
<td>530 12463</td>
<td>532 -9.0%</td>
<td>535 -10.1%</td>
<td>537  -8.5%</td>
<td>539  -0.3%</td>
<td>541  -7.5%</td>
<td>543  -10.3%</td>
</tr>
</tbody>
</table>
collection via their website. Part of the PDS campaign will reference the online collections, but we are not focusing on revamping the SCRC website at this time.

**SWOT**

**Strengths.** The SCRC has a number of strengths, not the least of which is the collection itself. Among the gems in the collection are the Papers of John Dewey, the Open Court Press papers, the Irish Studies collection, the “papers of Erwin Piscator, Mordecai Gorelik and Marjorie Lawrence, the records of Dublin's Abbey Theatre and Great Britain's Unity Theatre, and the American Sherman Theatre Collection of melodrama play scripts,” as well as the papers of Senator Paul Simon (along with other political papers), Southern Illinois history collections, University Archives, a large photograph collection, and a complementary rare book collection.

Another strength of the SCRC is its director, Pam Hackbart-Dean. Pam is a respected, published professional archivist with many years’ experience. She has acted as a co-dean, a director of special collections, and now additionally director of the university museum.

**Weaknesses.** The weaknesses fall into two categories: financial and audience. First, the financial situation has been described previously. This situation is not going to be alleviated overnight. State funding continues to be an issue as does the low enrollment. It will take many years to adjust and to see any potential gains.

The second weakness is audience—meaning the target audience is not aware of the SCRC and therefore does not utilize it as much as it could. This is what the marketing campaign aims to address.

**Opportunities.** It seems we have an opportunity to market the SCRC’s collections not only to those undergraduate majors who are considered the most likely user, but also to those who may not consider SCRC helpful to their research. By examining SCRC’s collections and pairing primary document sources with majors in these categories, we may be able to increase use of the SCRC.

**Threats.** The threats are related to the weaknesses. When there is a lack of funding, services and units that are underused often go underfunded. The SCRC has not filled a number of positions, including manuscripts archivist, due to lack of funding. This puts a strain on the remaining staff to handle requests, assist patrons, and care for the collections as needed.

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Original Data

In order to determine awareness about and utilization of the Special Collections Research Center (SCRC) a survey was administered in September 2017. We wanted to understand how patrons are conducting research and how the SCRC can fit into the research needs of users. The survey was intended for all users of Morris Library. We discovered:

- 81% of survey respondents had heard of the SCRC
- 29% of respondents have never visited the SCRC while 33% have visited only once

Those who responded to the survey were primarily undergraduate students. Faculty were the second highest responding group.

Status of Survey Respondents

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>33%</td>
</tr>
<tr>
<td>Graduate</td>
<td>19%</td>
</tr>
<tr>
<td>Faculty</td>
<td>24%</td>
</tr>
<tr>
<td>Staff</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
</tr>
</tbody>
</table>

Although undergraduates made up the most respondents, their awareness and use of the SCRC was low. Almost half of the respondents who identified as undergraduates were not aware of the SCRC. Of those who had heard of the SCRC, the majority never visited or only visited once. In some cases this was for a class assignment.

![Frequency of Visits to SCRC in the Last Month](chart)

While overall awareness of the existence of the SCRC was high (81%) utilization could be improved. The chart above indicates the number of times respondents have visited the SCRC in the last month.

Of those respondents who utilized the SCRC, the most highly used collection was the photograph collection, followed by both manuscripts and digital collections.
This high volume of use for one collection during the survey period may indicate use due to class projects. Further research would need to be conducted to determine if the photograph collection is indeed the most used collection. Those respondents who used the digital collections were generally satisfied or neutral in regard to the amount of material available online. Two respondents requested additional materials for inclusion.

Of those respondents who had heard of the SCRC, 41% indicated they learned about it from Morris Library’s website, while 35% had learned about the center from a professor. This indicates that the library’s website is being utilized and efforts should be made to keep it current and to add new information as needed. It is encouraging to note the role of faculty in promoting awareness of the center. In addition, 25% of respondents who had heard of the SCRC learned about it through an exhibit sponsored by the SCRC.

Awareness of the SCRC through library signage and printed materials represented only 12% and 6% respectively. While these numbers may indicate a need to improve library signage and materials, it may also indicate a shift in the way users are locating information overall.

Respondents were asked where they first looked for sources when conducting research. Subject websites (33%) had the highest percentage with the second highest being Morris Library’s website (24%). Other options included Google (14%), Morris Library (19%), public library (5%), public library website (5%), and Other (0%). This again indicates a strong use of Web resources, particularly Morris Library’s website, for research purposes.

When asked about the likelihood of attending a short presentation on what materials the center has available, how to use them, and other services offered by the center, respondents who identified as graduate students or faculty were the most likely to attend. This may correspond to the need of graduate students and faculty to conduct research more often and at a higher level than undergraduate students.

**Recommendations**

- Encourage faculty to introduce undergraduate students to the SCRC
- Continue updating and improving the Morris Library website
- Offer instruction to undergraduates on the materials and expertise available at the SCRC (Given the survey results, this should occur as part of a class assignment.)
- Find ways to involve undergraduates in SCRC exhibits or special events
- Consider adding more materials to the digital collections

<table>
<thead>
<tr>
<th>Materials</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not use</td>
<td>33%</td>
</tr>
<tr>
<td>Photographs</td>
<td>29%</td>
</tr>
<tr>
<td>Manuscripts</td>
<td>24%</td>
</tr>
<tr>
<td>Digital collections (not photographs)</td>
<td>24%</td>
</tr>
<tr>
<td>Political papers</td>
<td>19%</td>
</tr>
<tr>
<td>Digital photograph collection</td>
<td>19%</td>
</tr>
<tr>
<td>University archives</td>
<td>10%</td>
</tr>
<tr>
<td>Rare books</td>
<td>6%</td>
</tr>
</tbody>
</table>
**Market Segmentation**

The survey indicates that while undergraduates may have heard of the SCRC, they have not utilized it. This is market segment we should target. It may be beneficial, at the outset of the campaign, to think small and target those groups who may be the most likely users of the materials in the SCRC—majors in philosophy, history, and English. If the campaign is successful, it could be expanded to those majors outlined in the Analysis section of the Marketing Audit. It will take a targeted effort to attract those majors who do not see the SCRC as having material directly necessary for their research. Whereas the current collections very easily dovetail into the interests of those undergraduates majoring in philosophy, history, and English.

The outline of this market segment is:

- Undergraduate majors in philosophy, history, and English
- Need for primary source documents for research purposes
- Need for specialized assistance in locating, using, and citing primary source documents

**Service Identification**

The service that is going to be marketed and promoted to the target audience is the availability of primary source documents at the Special Collections Research Center. Students do not need to go far away to find excellent primary sources for their research interests. Further, the staff of the SCRC are experts and have the ability to assist students with their queries. Specifically, the PDS campaign intends to raise awareness and use of the SCRC by offering digital badges to students for completing a number of tasks. These tasks are directly related to utilization of the SCRC’s resources.

- **The Core.** Materials to help write research papers or other requirement.
- **The Tangible.** Manuscripts, photographs, rare books, university archives.
- **Augmented Levels.** Expert staff, finding aids, tutorials, digital badges.

This service may be a cash cow because the service is inexpensive and easy to maintain. One might argue that, in fact, keeping professionals employed in the SCRC is not inexpensive, and I would agree. However, there is no additional upfront cost in this case. The staff are already hired. The SCRC website already exists, finding aids and tutorials are already prepared, and the collection at the SCRC is ready and waiting.

**Mission, Goals, Objectives, Actions, Timelines, and Budget**

**Mission**

The mission of the SCRC is:

The Special Collections Research Center (SCRC) of the Morris Library at Southern Illinois University Carbondale (SIU) collects and preserves unique and rare historical materials
in selected subject areas, and promotes the use of these materials by the SIU community, scholars, and the public. Its goal is to advance scholarship and further the educational, research, and service missions of the university.  

Goals/Objectives

We felt the goals as outlined in Tamar Chute’s article, “Selling the College and University Archives: Current Outreach Perspectives,” were, in part, helpful in informing the goals for the PDS campaign. Chute outlines five goals of archival outreach, four of which fit with the goals of our campaign:

“To reach as many people as possible in promoting a positive attitude towards the archives
To teach constituents about the role the archives can play in their professional and personal lives
To have users recognize collections
To show that the archives staff and material are of value”

Actions

The actions we will undertake to reach the goals as stated above include:

Contact faculty who teach large undergraduate courses with the intent of offering a one-time introductory session with their classes on the who, what, and where of the SCRC

Introductory exhibits: outlining the who, what, and where of the SCRC

Follow those introductory exhibits with detailed exhibits showing available materials

Exhibits will also highlight various SCRC staff so students can put a face to a name

Offer one-time SCRC introductory talks to classes

Introduce the digital badge program

Offer an open house in the SCRC for students and faculty in those classes that have been visited

Evaluation of the marketing efforts

Revamping of the campaign as needed

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42 Tamar G. Chute, “Selling the College and University Archives: Current Outreach Perspectives,” p. 45.
Timelines

Southern Illinois University Carbondale operates on the semester system and classes usually begin in the middle of August.

*June or July 2018 (Possibly earlier if classes have been assigned)*

Contact professors of large freshmen classes in order to set up one-time SCRC introductory talks. This should give time to get the talk worked into the syllabus for the coming semester.

*August 2018*

Set up introductory exhibits in library, student center, and send out flyers to dorms. By putting flyers about the PDS campaign in the dorms we are reaching students who may not yet come to the library or know anything about what the university has to offer.

Place information on library website, library Facebook page, and SCRC Twitter account.

Start planning open house.

*September 2018*

Begin giving SCRC introductory talks in classes across campus. Change exhibits to more substantive than informative—showing materials and introducing staff.

Introduce digital badge program.

Prepare and send invitations to open house. Finalize which items will be displayed at the open house.

*October 2018*

This is around mid-term so students will be thinking about final papers and projects. The open house should be offered at this time. Offer attendees an opportunity to evaluate this experience.

*November 2018*

Again promote the SCRC as a place to find primary sources because this is toward the end of the semester and students will be looking for help. Make sure promotional materials indicate the expertise of the staff at the SCRC.

This promotion may include more flyers in dorms, additional exhibits, and a follow up with professors of classes that were visited earlier in the semester. Social media could also be used for this portion of the campaign.

Send evaluation form to professors for feedback of one-time introductory session’s usefulness.
December 2018

Wrap up digital badge program. Depending on the number of participants, offer a certificate of completion.

Usage statistics should be kept throughout the semester and tabulated at this time for any changes.

Budget

Printing

There are eleven 3-story residence halls on SIUC’s west campus. If we aim to put three introductory flyers on every floor of every residence hall, that is nearly 100 flyers for residence halls. We will also need additional flyers for the student center and library. We should therefore budget for 150-200 introductory flyers. Although we do not have a finalized estimate from the SIUC Printing and Duplicating Department, we will budget $300.00 for these flyers.

Additional materials to be printed include bookmarks, business cards, invitations to the open house, and certificates for those completing the digital badge program. Instead of sending individual invitations to each student and faculty member, which could become very expensive, we will send one invitation per class. If possible (if acceptable within university privacy concerns), we will also send out email invitations to the students and faculty. Once again, we do not have a finalized estimate from Printing and Duplicating, but will budget for these items.

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
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<tr>
<td>Bookmarks (100)</td>
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</tr>
<tr>
<td>Business cards (250)</td>
<td>$200.00</td>
</tr>
<tr>
<td>Open House invitations</td>
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<tr>
<td>Certificates: (50)</td>
<td>$25.00</td>
</tr>
<tr>
<td>Printing total:</td>
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</tbody>
</table>

Open House

In addition to the Open House invitations, the SCRC will serve light refreshments. If not required to use the university catering service, a local grocery store may be contacted for cheese and fruit trays, along with dessert items. This shouldn’t cost much more than $150.00, including punch, juice, or other nonalcoholic beverage.

Student Workers

If there is enough money, it might be helpful to have two or three student workers available for the open house. In addition, a student worker might be of help to the SCRC
staffer who is giving talks in the classroom. Student workers on SIUC’s campus are paid Illinois’ minimum wage rate of $8.25 per hour.

Assuming the Open House will last two hours and there are three workers, that is a cost of $49.50.

It is unknown yet if a student worker will accompany the SCRC staffer to the various classroom talks. If there is money left in the budget, this can be revisited.

**Staff Hours**

SCRC staff are paid a salary, not by the hour. They are part of the administrative/professional category. This means that even if they work longer than the prescribed 7.5 hours per day, there is no overtime pay.

The SCRC does not employ any civil service (hourly pay) personnel because it is part of Morris Library. The library is responsible for figuring payroll, hours, benefits, etc.

There will certainly be additional staff hours required to implement the PDS campaign and the extra burden on the staff should not be overlooked. It may be possible to arrange flex hours for the staff who are conducting the classroom sessions in order to relieve some of the burden of their daily hours.

**Indirect Costs**

Because the SCRC is part of a larger library which is part of a university, most of the indirect costs are covered by the larger entity. The SCRC does not have a monthly electric bill, water bill, or heating/cooling bill. There is a technology fee, but this is paid through the larger library system.

**Communication**

**Promotion**

The promotion of the PDS campaign will begin with flyers. All the promotional materials use the same logo, font, color scheme, and message as part of the integrated marketing communication. Lamb writes, “Integrated marketing communications (IMC) ensure consistency and effective use of all communication channels. In other words, all communications would use the same brand elements (i.e., name, tag line, logo, headline, graphics, fonts, colors) and a central message (i.e., key words, talking points, examples).”

The marketing mix used in this campaign includes flyers to gain attention; business cards and bookmarks that can be handed out, or picked up by students; one-time visits by SCRC staff to classrooms; posts on the library and SCRC website and social

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media; and an open house to introduce students to the staff and materials available at the SCRC.

**Message**

As described by Lamb, we intend to use the AIDA system:

- **Awareness** (cognitive stage). Start by attracting attention. A service may be valuable, but it won't be used if potential users are unaware of its existence. From signs and posters to email messages and Facebook postings, knowledge comes first.
- **Interest and Desire** (affective stage). It's essential to analyze the audience to determine what types of communications will trigger interest. The benefits of the service could be highlighted in an infographic or a video could show happy people attending a program.
- **Action** (behavior stage). Convince users to participate by providing incentives, personal attention, or staffed exhibits. Get people to commit to a service.\(^{44}\)

In our case, Awareness is raised by the use of flyers, exhibits in various places across campus, and social media posts. Our message is, “Do you have PDS?” Asking a question is one way to start a conversation.

Interest and Desire is addressed by describing the materials and expertise available at the SCRC. An additional tag line is, “Ask Your Archive if PDS is Right for You!” This connects PDS, or primary document sources to the archive at the SCRC.

Action is addressed by SCRC staff offering one-time introductory sessions to using the SCRC, an Open House for students and faculty, and a digital badge program which utilizes the SCRC in its curriculum. Flyers and social media posts for the digital badge program will contain the same logo, font, and color scheme to connect them to the PDS campaign.

**Branding**

**Name:** Primary Document Sources, or PDS

**Tagline:** “Do you have PDS?” or “Ask your Archive if PDS is right for you.”

**Logo:** The shape and the color of the font are intended to convey the idea that primary sources are urgent and necessary.

**Typography:** The font is not fancy because the emphasis should be on the content, not the font.

**Colors:** We have used red for the PDS portions because we wanted them to stand out more. Also, red implies danger or that attention is needed.

Standards

_PDS logo_

The PDS logo should be used on every form of communication produced for this campaign. This includes but is not limited to brochures, flyers, website, social media, business cards, letterhead and other stationery.

_Color palette_

Only the designated color palette is to be used when designing posters, flyers, brochures, etc. Please do not deviate from blue, red, white, and black.

_Font_

There will be no use of fonts other than those already outlined in the design standard. Font size may be changed as best suits each type of publication. Approved fonts include: Norwester, Arimo, and Calibri.

_Templates_

All materials should utilize the templates provided by the library. There are templates for brochures, business cards, presentations, and letterhead.

_Editorial Style_

The library prefers the use of the Chicago Manual of Style for writing and citations.

_Graphic Elements_

There are several approved graphic elements that may be used in all forms of communication. These include the hexagon shape and the honeycomb background as found on the flyers and business cards.

_Public Relations_

Three kinds of public relations strategies we will use for this campaign are word-of-mouth, social media, and virtual content communication.

The SCRC already has a Twitter account and Morris Library has a Facebook page. Both of these accounts will be used during the PDS campaign. The 2017 survey indicated that respondents were also using the Morris Library website as a place to begin their research. Content will be added to the main library web page. In addition, when the digital badge program is launched, information will be placed on social media and the main library page.

Given the results of the 2017 survey, we suspect that word-of-mouth may be a powerful tool in creating good will between the SCRC and the student community. The hope is that by introducing the SCRC and creating a connection between the staff of the SCRC and the student community, long-term relationships will be formed.

We will accomplish this through first introducing SCRC staff in exhibits. We will introduce an individual staff member with a short biography, a photograph, and quotes from
the staff member about their favorite item in special collections, or their favorite book, favorite subject, favorite food, etc. This is a way of humanizing what may seem like an intimidating section of the library.

Once we have introduced the staff through exhibits (and links to the staff biographical information can also be placed on social media) we will send SCRC staff members to classrooms to conduct informative sessions about the SCRC. If students have already been introduced to the staff, the staff will not seem so aloof or out of touch with students.

In addition, the SCRC will hold an open house which will allow personal, one-on-one interaction with the materials in the SCRC and open conversations with the staff. Building relationships starts with conversations and we believe these encounters will be highly valuable in raising awareness of and use of the SCRC.

Publicity

We have designed several flyers, a bookmark, and a business card with QR code for the PDS campaign. These items are found in Appendix A.

Advertising

This campaign is focused on the undergraduate student body at a university. Our goal is not to reach a wide audience, including community members. Our goal is to reach a very specific audience—one found on our campus. This means that our efforts at promotion should be focused on our campus and any outlets available to us there. To this end, in-library advertising, along with campus advertising would be most effective.

Sponsorship may be somewhat challenging for this campaign. It is possible some of the university departments would be willing to provide a small amount of funding to cover printing costs. These departments would be those that we are targeting with the campaign including philosophy, history, and English. Outside sponsorship seems unlikely given the nature of the product and service we are offering.

Advocacy

The PDS campaign aims to raise awareness and use of the Special Collections Research Center. This is very important given the financial climate at the university. As stated above, resources are spread very thin throughout the university community and those programs or departments that are deemed underused may also go unfunded or underfunded. By increasing awareness and use of the SCRC this campaign will demonstrate the need for expert staff, broad collections, and funding for programs, preservation, and outreach within the university community.
Internal Marketing

Preparing the SCRC staff for the PDS campaign will take a number of steps. The first is to introduce the logo, name, and tagline. If staff are familiar with this portion, we will all start on the same page.

The staff are already well trained in the archive and know how to help users locate materials. This campaign is just a larger extension of that knowledge. The only new portion is the digital badges component. However, the activities associate with earning the badges is not new to the staff. The Morris Library IT department will assist with any technical questions or set up of that program. SCRC staff may refer to them for assistance.

As Lamb writes it will be vital to also follow the following steps:

“Use staff meetings to keep them informed and ask for feedback.

Post publicity materials in the work room where everyone can see what’s happening.

Talk with staff members directly affected by particular campaigns.

Send e-mail communications providing a ‘heads-up’ when campaigns begin.

Provide demonstrations, preview videos, and share survey results to keep staff in the loop.”

The current director is already an excellent communicator and holds one-on-one meetings with staff weekly. Adding the PDS campaign to the mix should not cause too much additional disruption in the regular discussion.

The SCRC staff will obviously be fully involved in creating and presenting the one-time classroom sessions. Their buy-in to the PDS program, therefore, is essential.

Evaluation

Understanding whether or not the PDS campaign has raised awareness or use of the Special Collections Research Center is an important part of the campaign. The campaign will be evaluated in a number of ways

1. The number of visitors is currently logged at the SCRC front desk. These numbers should be calculated weekly to look for any patterns of uptick in use.
2. The materials requested are also logged at the SCRC front desk. These numbers should be calculated weekly to look for patterns of use.
3. Website and social media traffic should be monitored to look for any possible increase in views, likes, or follows.
4. Participants in one-time classroom sessions will be provided with a brief survey after the session. This includes faculty and students.

5. Participants in the Open House will be provided with a brief survey.

Example of questions asked after informational classroom session:

1. Date of Session:
2. Name of Presenter:
3. Topic of Session: (This may vary based on the course visited—philosophy, history, English)
4. What is your current status: Freshman, Sophomore, Junior, Senior, Other
5. What is your major:
6. The instructional session was helpful: Strongly Agree, Agree, Neither Agree Nor Disagree, Disagree, Strongly Disagree
7. The information was useful to me in my research: Strongly Agree, Agree, Neither Agree Nor Disagree, Disagree, Strongly Disagree
8. One thing I learned that I did not know before: (open-ended)
9. One thing that would make this session better: (open-ended)

Questions for faculty regarding information session:

1. Date of session:
2. Name of Presenter:
3. Topic of Session:
4. Was the information session pertinent to your classroom needs? Yes, No
5. If no, why not:
6. Would you recommend the SCRC to your students? Yes, No
7. If no, why not:
8. One thing that would make this session better:

Questions to be asked after Open House at SCRC:

1. What is your current status: Freshman, Sophomore, Junior, Senior, Faculty, Staff
2. What was the best part of the Open House?
3. What was the worst part of the Open House?
4. What would you have liked to have seen but did not get to see?
5. What question did you want to ask but did not get to ask?
6. How might we improve this experience?

Questions asked of those participating in the digital badge program:

1. The digital badge program helpful: Strongly Agree, Agree, Neither Agree Nor Disagree, Disagree, Strongly Disagree
2. I learned how to use the SCRC through the digital badge program: Strongly Agree, Agree, Neither Agree Nor Disagree, Disagree, Strongly Disagree
3. I now know how to find primary document sources: Strongly Agree, Agree, Neither Agree Nor Disagree, Disagree, Strongly Disagree
4. The best part of the digital badge program:
5. The worst part of the digital badge program:
6. One thing that would make the program better:

Reflection

Finding ways to engage with undergraduate students is challenging. They are a diverse group from many different places with different learning needs. The goal of the PDS campaign is not to be all things to all people, but to introduce primary document sources to undergraduates in an effort to help them with their research and projects.

Most library or special collections marketing does not meet the students where they live—the residence halls. By placing informational flyers in the residence halls we aim to introduce the Special Collections Research Center to students on their turf. We hope that by reaching out to students in their residence halls we may introduce the SCRC to students who may not frequent the library.

In addition to reaching out to the residence halls, our exhibits in the student center also reach out to students where they are comfortable. They may be at the student center to eat lunch, grab a coffee, or hang out with friends. Introducing the SCRC in a place that is nonthreatening and casual may help increase awareness and good will toward special collections. Just as Chute noted in her article, part of marketing includes “placing written materials or exhibits at various locations around campus. Contact with materials clearly identified with the archives can leave an individual with a positive appreciation of the archives and what it has to offer.”  

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Most undergraduate students are very comfortable with technology, so the use of digital badges is offered as a way to engage them with technology. Furthermore, promoting the badge program via social media will help raise awareness and hopefully increase use of the SCRC via a medium most comfortable to students.

46 Tamar Chute, “Selling the College and University Archives: Current Outreach Perspectives,” p. 36.
Appendix A

PDS

PRIMARY DOCUMENT SOURCES AT

Morris Library

SPECIAL COLLECTIONS

ASK YOUR ARCHIVE IF PDS IS RIGHT FOR YOU!
How Can We Help?

At Special Collections we have what you need!

Over 100,000 photographs

34 online collections

100s of online finding aids

Manuscript collections in:

American Philosophy,
Irish Studies, First Amendment Freedoms,
20th Century American and British Literature,
Theater, World War I, Cold War Political Culture
and more!
WHAT ARE PRIMARY DOCUMENT SOURCES?

PRIMARY DOCUMENT SOURCES ARE DOCUMENTS THAT WERE CREATED AT THE TIME OF AN EVENT. IN OTHER WORDS--A FIRST-HAND ACCOUNT OF HISTORY.

EXAMPLES INCLUDE:

- HISTORICAL NEWSPAPERS
- PHOTOGRAPHS
- LETTERS
- DIARIES
- SPEECHES
- AUDIO AND VIDEO RECORDINGS
- PERSONAL JOURNALS
SPECIAL COLLECTIONS
PRIMARY SOURCE
SUPER SLEUTHING BADGE PROGRAM

**Source Voyage**
Earn this badge by taking a tour of Special Collections. There will be an introductory presentation and quiz on what you've learned.

**Source Identifier**
Earn this badge by learning about primary vs. secondary sources. Watch video instruction and take a quiz on what you learned.

**Source Locator**
This badge starts to put your knowledge to use. Locate and retrieve copies of three primary sources in Special Collections on a subject of your choice. Describe each one in terms of its context, use, and significance.

**Source User**
Earning this badge requires use of primary document sources from Special Collections in a writing assignment for a class or project. Proper citation is also part of the badge requirement. Verification of use by instructor required.
NEED HELP WITH PDS?
SPECIAL COLLECTIONS CAN HELP!
Visit us on the 1st Floor of Morris Library

618/453-2516

SPECIAL
COLLECTIONS

Primary Document Sources
- Valuable insights
- May lead to better grades and appreciation of historical context
Primary Document Sources can result in valuable insights, appreciation of historical context, and may result in better grades.

Special Collections can help! Visit us on the 1st Floor of Morris Library or call us at 618/453-2516.

Ask your Archive if PDS is right for you!
Works Cited


