

## IDR Marketing Plan - Draft

### *Overview*

Marketing the IDR is not a separate phase of the project. Rather, marketing and implementation plans are continuously incorporated into the project as it progresses from prototype through final product. This has already occurred throughout the development process, as evidenced in the solicitation and participation of various stakeholder groups. A broad spectrum of library staff is involved in data entry, devising cataloging protocols, interacting with other campus units to solicit content, etc. This reflects best practice methodology in involving stakeholders early in the design and development of an innovation in order to maximize support.

This marketing plan is being written at the end of Phase Two. Some events/activities included here are planned before the review and assessment phase. Future marketing would require more focus and resource allocation than was contemplated earlier in this project. To ensure credibility, future marketing activities are contingent upon library and university administration endorsement of further development of the IDR. **Future marketing initiatives should only proceed if there is a firm administrative commitment to sustain the IDR.**

### *Marketing Goals*

Marketing of the IDR is an enabling objective, designed to position the IDR so that it can meet its stated purpose:

1. Make it easier for students to learn
2. Make it easier for faculty to teach
3. Supplement scholarly communications

The IDR marketing objectives are:

1. **Influence** faculty, students, and administrators to **contribute content** to the IDR so that it remains current and relevant.
2. **Inform** a broad audience about the existence of the IDR; **educate** various market segments about IDR benefits to their particular group, **influence** faculty and students to use the IDR as an **information resource**; ...

These objectives are interdependent, i.e., the outcome from each marketing domain profoundly influences success potential in the other marketing domain. The ability to continuously recruit new content will depend to a large degree on evidence that the content is being read and cited by a broader audience. Likewise, sustainable user interest in the IDR will depend on the breadth, quality, relevance and currency of content.

## ***IDR Marketing Leaders***

### **Subject Liaisons**

Because of their relationships with academic departments and institutes, Library Subject Liaisons are uniquely positioned to promote the benefits of a robust IDR to their T&R colleagues. Established communication channels are ideal means for educating faculty about open source scholarly publishing and IDR services, soliciting content and influencing faculty and students to make use of the IDR as an information resource. Examples of Subject Liaison marketing activities are:

- Introducing agenda items discussing the IDR in academic department/institute meetings
- Informal departmental round tables
- E-mail to department/institute members
- Sponsor IDR workshop for department/institute members
- Discussion of IDR in librarian consultations for new faculty and grad students
- Demonstrate author web page to a group of departmental faculty and staff
- Share statistical results (citations, downloads) with department faculty and staff to reinforce effectiveness of IDR.
- Add a section about the IDR to the “What Can Faculty Do?” page ([http://www.library.nd.edu/colldev/library\\_budget\\_cuts/what\\_can\\_faculty\\_do.shtml](http://www.library.nd.edu/colldev/library_budget_cuts/what_can_faculty_do.shtml))
- Include a section about the IDR in subject-specific library instruction sessions

### **Reference/Instruction Librarians**

“...the single most important criterion of an IR’s value to our faculty members is that *other* people find, use, and cite the work that they put into it. Even the most enthusiastic supporters of IRs will soon lose interest if this criterion is not met.” (Foster, Gibbons, 2005) The public service orientation of Reference Librarians qualifies this group to take a leadership role in promoting the IDR as a research resource. Reference librarians are also influential in the library classroom and can promote and encourage the use of the IDR as an information resource. Reference librarians interact regularly with a broad spectrum of patrons from the ND community and can also act as solicitors of content for the IDR. (Phillips, et al, 2005) Examples of Reference Librarian marketing activities are:

- Recommend the IDR as an information resource at the point of need
- Include a segment about the IDR in library instruction sessions
- Add a section about the IDR to library promotional literature
- Design and develop IDR educational materials in print and web formats
- Sponsor general faculty/grad workshops on IDR issues
- Act as a distribution channel for IDR information from other sources
- IDR Display on bulletin boards and/or display case

Subject and Reference Librarians who agree to assume the role of marketing leader should be prepared to participate in training sessions so that they can confidently present the IDR as a vital and effective tool for scholarly communication.

## ***IDR Task Force***

If the IDR moves forward as a library-led campus project, it will require commitment of human and physical resources, and a spirit of collaboration among various library units and also between the library and the broader campus community. Marketing leaders must be conversant about functional and technical aspects of the IDR in order to effectively present the concept to T&R faculty and students. Team leaders of staff who enter content must be aware of anticipated demand levels in order to plan effective workflows. Those who create promotional and educational items about the IDR must be informed about user needs, successful applications and limitations. These examples illustrate the importance of cross-functional communication and collaboration regarding the establishment and maintenance of the IDR. The IDR has the potential for significant organizational impact on the library. Consideration of this aspect should be part of the Task Force charge.

An IDR Task Force would be an overarching, cross-functional body for policy creation and review authority, dissemination of information, sharing of ideas, allocation of resources, technical oversight and development, and evaluation of project effectiveness. Logically this group would comprise several specialty sub-groups:

- Training (Internal and External)
- Metadata standards
- IDR services (author web pages, citation statistics, etc.)
- Marketing and Promotions
- Technical Issues
- More as needed

The Task Force would be a vehicle for timely communication among IDR leaders about issues of importance to multiple interest groups.

Team IDR members who have already established relationships with other campus departments for solicitation of content should be included in the initial membership of the IDR Task Force. Their experiences will be an asset to newer participants. If possible, several early adopters from T&R faculty should also be included in the membership. These should serve in an advisory capacity to minimize the time commitment and increase the likelihood of participation.

## ***Challenges***

A review of the literature indicates that even MIT, a leader in the development of the IR and developer of the open source software, D-Space, has wrestled with the challenge of obtaining sufficient content from faculty and students to justify the ongoing expense of maintaining a relevant IR. (Foster, Gibbons, 2005)

“...what faculty members and university researchers want is to do their research, read and write about it, share it with others, and keep up in their fields...But even those who are most committed to the role of professor...complain of overwork, resist clerical responsibility, and resent any additional activity that cuts into their research and writing time.” (Foster, Gibbons, 2005) For this reason, it is especially important to identify and market to the so-called gatekeepers; i.e., those who control access to and may influence faculty and students about participation in the IR. At Notre Dame, this group would include administrative staff and research assistants, who are likely to be involved in physically uploading or transferring content to designated library staff. It is imperative that this group be included in promotional efforts to overcome any perception that the IR content submission process is burdensome.

## ***Conclusion***

There is evidence that institutional repositories are gaining acceptance within the worldwide scholarly community. "In terms of the product life cycle the technology of IRs is gathering critical mass and should move to maturity within the next 5 years". (Swanepoel, 2005).

The marketing effort will take place in phases and each phase will focus on a target group. Motivating factors for each target group will be different. Marketing efforts need to be tailored to the perceived needs of each target group.

1. The first phase has already occurred with the call for participation from a broad spectrum of library staff. Excellent response indicates that there is a great deal of interest in the project and that there is ample goodwill among library staff to advance and refine the product. This is a benefit to the further development of the project, as it lends credibility and demonstrates success in recruiting people. Further marketing efforts will be facilitated by the energy from this phase.
2. The second marketing phase will be led by Eric Morgan and volunteer members of Team IDR. It will focus on recruitment of Subject and Reference Librarians to further the promotion of the IDR.

Librarians must feel that participating in promotion of the IDR is likely to enhance relationships with their constituents. They must also feel comfortable that the IDR will truly be an asset for the ND community, that the library brings unique skills to the project in developing and maintaining the IDR, and that there will be continuing administrative support for the project.

The development of peripheral services - such as author pages, citation records – will also play a large role in making participation in the IDR an attractive venture. Both Subject librarians and Reference librarians should be trained to be able to demonstrate these features when discussing the IDR with their own target groups.

3. The third phase will involve Subject and Reference Librarians marketing the IDR to the broader academic community. This phase will require the continued support of IDR specialists, web and print materials, and a budget for sponsorship of promotional events as needed. Such events are most likely to be effective in informal departmental meetings (such as Cafecito in the Latino Studies Institute). Subject Librarians should have at least nominal budget authority to sponsor simple catering for academic department meetings. Reference Librarians should be able to integrate discussion of the IDR into library instruction sessions and support materials without incurring additional costs. Library Instruction typically hosts at least one faculty/grad workshop during the academic year and this would be a suitable forum for presenting the IDR and appropriate applications.

More detailed marketing plans will evolve through the IDR Task Force and the efforts of marketing leaders as the IDR expands its role at Notre Dame.

## References

- Foster, Nancy F., Gibbons, Susan (2005). Understanding faculty to improve content recruitment for institutional repositories. *D-Lib Magazine*. 11(1). Retrieved 6/22/2006 from <http://www.dlib.org/dlib/january05/foster/01foster.htm>.
- Phillips, H., Carr, R., Teal, J. (2005). Leading roles for reference librarians in institutional repositories: One library's experience. *Reference Services Review*. 33(3), 301-311.
- Swanepoel, Marinus. (2005) Digital repositories: All hype and no substance?. *New Review of Information Networking*. 11, (1), 13-25. Retrieved 6/22/2006 from Academic Search Premier Database site.

**Brief Timeline - IDR Marketing Plan**

Event/Activity	Date/Season	Library Leaders	Audience	Resources	Goal
New Faculty Reception	9/7/2006	E. Morgan	New T&R faculty, college deans, library faculty	Knowledgeable library faculty; PowerPoint presentation (event already funded by library)	Introduce IDR to new faculty to encourage content contribution; Promote researcher/student benefits to deans; Reinforce concept
New Grad Orientations	8/23 & 24/2006	E. Morgan	New graduate students	Knowledgeable library faculty	Demonstrate EDT section of IDR; Promote benefits to researchers; encourage content and use for research.
Open Forums	December 06	E. Morgan, sub-group team leaders	All library faculty and staff	Preparation time for approximately 6-10 people; meeting time for large number of people	Inform all library personnel about assessment results, administrative endorsement, proposed action plan and strategic goal for moving forward with IDR. Gain buy-in from a large group of library personnel in order to advance the project.
ULON - If IDR is endorsed by library administration	Early 07	Library Director, Assoc. Dirs.	Library Faculty & Staff	Preparation time for composing	Announce library commitment to IDR to all library staff
Factotal	Early 07	Library Director, Assoc. Dirs.	Library Faculty & Staff	Preparation time for composing	Announce library commitment to IDR to all ND Faculty
Library Web Site Announcement (News Flash)	Early 07	Web Developer	All ND	Design, development time for graphic and content	Announce library commitment to IDR to ND Community
Target Group Meeting - Presentation to Reference	Early 07	E. Morgan, Team IDR volunteers	Reference Librarians	Preparation and meeting time	Present benefits of IDR and solicit commitments to participate as marketing leaders

Target Group Meeting - Presentation to CD Forum	1 <sup>st</sup> CD Forum after gaining administrative endorsement	E. Morgan, possibly early adopter from T&R faculty	Library Subject Specialists	Preparation time to outline IDR benefits & advantages to ND faculty; outline objectives of an IDR task force	Present benefits of IDR and solicit commitments to participate as marketing leaders
Write draft charge and plan for IDR Task Force	Early 07	Library administrators, Coll Dev, Ref Dept, Cataloging, CADM Heads, E. Morgan	Library Faculty and Staff	Meeting time to gain input from various departments, groups, etc. Preparation time to compose, evaluate, revise, etc.	Create a multi-functional leadership team for IDR development, evaluation and maintenance.
Access Article	Early 07	Library Director and/or Associate Directors	ND Community	Preparation time for writing article	An article from top-level library administration to publicly introduce and acknowledge the IDR as a research tool for the ND community
Academic Department Meetings – IDR Presentations	Ongoing 07	Subject Liaisons	T&R Faculty and Departmental Staff	Librarian time to prepare presentation	Present benefits of IDR and solicit content
User Education Materials	Early 07	Web Developer, Library Instruction Staff	ND Community	Design, development, production time of support materials;	Inform users of IDR benefits, guide toward proper use of IDR, encourage content contributions
Faculty Workshop	Early 07	Library Instruction (in collaboration with other library depts.)	ND faculty and grad students	Knowledgeable librarian presenters; budget for snacks, prep time for presentation	Inform users of IDR benefits, guide toward proper use of IDR, encourage content contributions
Scholarly Communication Symposium	Fall 07?	E. Morgan, IDR Task Force, lots of others	Scholarly Community	Budget for speakers, social events, supporting materials, etc.	Connect to broader scholar community for collaboration on publishing issues.