

AC 2009-173: MARKETING THE ENGINEERING LIBRARY

Megan Sapp Nelson, Purdue University

Marketing the Engineering Library

Abstract:

Marketing is a tool of librarianship that is infrequently taught to library professionals, yet plays an important role in outreach to students, faculty, and staff. This paper shows the process that Purdue University's Engineering Library faculty utilized to develop and implement a marketing plan. As the process evolved, an inventory of current programs, an analysis of current patrons and current marketing methods, an assessment of available marketing venues, a map of marketing venues for target patron groups and a plan to supervise marketing projects were designed. Future plans include evaluating specific marketing venues for their effectiveness in reaching specific target markets.

Introduction

Librarians have been talking (and writing) about marketing for years. For the most part, librarians have accepted that marketing must be done, but marketing is infrequently the primary job description of a librarian.¹ A marketing plan and marketing tools, if well designed, can help to create a constant awareness among library staff and faculty for the need to reach out to patrons. Marketing effectively informs and compels patrons to use library services, which in turn produces positive user experiences as they successfully use library resources. While initial outlay of time and resources can be considerable, the marketing plan can enable much quicker and more accurate communication with specific patron groups.

Review of literature

Librarians' understanding and use of marketing tools has been documented in the literature. Spalding and Wang analyzed the use of marketing at academic libraries throughout the USA. They discovered that library administration and those who had taken marketing coursework were much more likely to support systematic marketing than those who had not taken the coursework.¹ Sen studied librarians' understanding of marketing orientation² and found that librarians understand marketing concepts but tend to focus their attention on the customer service aspects of marketing. She also found that libraries need to develop better competitive intelligence, in order to develop better customer service. Welch surveyed the websites of academic libraries to determine how frequently the library websites linked to marketing and promotions departments.³ She discovered that university marketing departments were frequently disconnected from the university library.

The marketing activity in libraries is directed in a variety of ways, ranging from committees to individuals hired to oversee the marketing plan and initiation. Georgia Tech created a public relations team specifically to communicate in original and compelling ways to their primary audiences of undergraduates and faculty.⁴ Washington State University Libraries instituted a task force to oversee public relations and marketing initiatives.⁵ Weil Cornell Medical Library had a

fulltime position of Head of Library Relations that primarily oversaw marketing and public relations for a brief period in the 1990s before switching to a committee based model.⁶

Many individual libraries have initiated a marketing procedure and have discovered various tools or techniques that they consider to be particularly valuable or useful. Hallmark Kennedy, Schwarz and Roy provided an outline of the necessary steps it takes to implement a marketing plan, including budgeting.⁷ Conley and Tucker explored the necessity of developing target audiences and provided useful tools for developing strategies for reaching target audience members.⁸ Campbell and Gibson reported mixed results following the implementation of strategic marketing at Creighton University.⁹ Duke and Tucker discussed the importance of aligning a marketing plan with a strategic plan in order for the marketing to be successful.¹⁰ Shamel discussed how to build a brand for a library.¹¹ Alire explained the value of word of mouth marketing in an academic library setting and detailed how word of mouth marketing can be deliberately implemented.¹² As a corollary of the value of word of mouth advertising, Andeen noted that all staff must buy in to a marketing strategy for a library, particularly front line staff. It is imperative that there is buy-in throughout the organization for a successful marketing plan to be implemented.¹³

Librarians have been implementing marketing approaches in increasingly systematic ways. In recent years, several libraries have attempted to integrate marketing into library work flows. Hallmark Kennedy et al. provided a brief overview of the development and implementation of a marketing plan in an academic library. The resulting plan included a separate budget of \$10,000 to carry out activities to market the library.⁷ Conley and Tucker described the process of creating a marketing plan beginning from a strategic plan and presented tools that may be helpful to the practice of marketing in an academic library.⁸

Other libraries have approached marketing in a more targeted way, as the result of initiated or revitalized programs. In these cases, engineering librarians were primarily implementing functional marketing and tying it to specific events, products, or services targeted to the entire population of engineering-affiliated students or faculty. The MIT Libraries used a variety of Web 2.0 programs to market library resources and services.¹⁴ Empey and Black discussed the use of marketing to improve university-wide perception of library services and staff through use of the ALA “@ your library” campaign.¹⁵ Texas A&M evaluated the effectiveness of a virtual reference marketing campaign and discovered that the library website and orientation programs were primary methods of communicating the presence of virtual reference availability.¹⁶

Creating the marketing plan

As one of twelve libraries on a Tier 1 university campus, the Siegesmund Engineering Library at Purdue University is one resource of many available to engineering undergraduates, graduate students, and faculty. In recognition of the difficulty of informing library patrons about specialized research resources, the Libraries administration created a marketing department. In

the marketing department, marketing professionals provided coordination, expertise, and design services for the broader university libraries marketing goals. These professionals took on the major projects of designing a Libraries-wide brand and implementing a redesign of major library handouts and assisting in redesigning the library website. They also created an extensive list of possible marketing avenues available at the university. In the process, they created co-brands for each of the individual subject libraries to be used in conjunction with the wider Libraries brand, so that individual libraries retain a separate identity while complying with the new branding expectations.

Their services were made available to individual branch libraries by request. However, they generally did not have enough time to coordinate all marketing projects that happen in the Libraries. Taking advantage of the new engineering library co-brand, a marketing plan was created to organize and coordinate engineering library specific outreach and communication activities.

Few MLS programs have marketing courses available to students.^{14,17,18} Therefore, marketing has been a skill that librarians frequently pick up through mentoring or through independent learning.¹⁷ For the author, independent research and study was the most effective way to acquire marketing savvy.

As a primer, there are many books to assist librarians to learn the skills that they need to successfully market library services. *Library marketing that works!* by Suzanne Walters covered the marketing process as a whole, from developing a strategic plan to using marketing tools such as the Six Ps (product, price, place, positioning, promotion, and politics) and relationship marketing in a library setting.¹⁹ *Blueprint for your library marketing plan*²⁰ covered not only basic marketing concepts but tied them together with a template plan geared towards libraries. Articles featuring marketing projects done by other libraries were the best available resource to develop the Purdue Engineering Library's particular plan. Articles detailing approaches that libraries around the country used to developing marketing plans were very relevant to this project. Of particular interest were publications about science and engineering libraries, due to the fact that they have the same target audience that Siegesmund Engineering Library serves. Engineering library patrons tend to be tech-savvy people who look to the web first for all information queries, and participate in a curriculum that frequently does not require secondary and tertiary resource usage in assignments. As a result, they are neither frequently inclined by habit nor directed through course work to use the library resources. The experiences of other librarians who have innovated and developed strategies for reaching these students in these challenging conditions were very valuable.

The marketing process that was chosen corresponds to the following flowchart, reproduced with permission of the author.¹⁹ The process started at the point of research, initially focusing on best practices and basic instructions on the how to best develop a marketing plan. Then the focus shifted to understanding objectives and tactics, evaluating demand for available services, and

researching the demographics of the existing patron base. At that point previous marketing projects were analyzed, developed a new strategy and began implementation of this new plan.

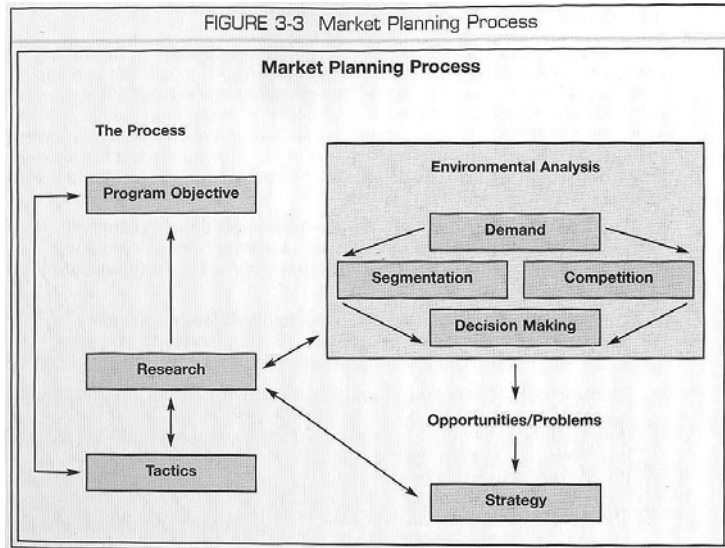


Figure 1: “The Market Planning Process”¹⁹ pg. 69. Reproduced with permission of the author.

The initial research stage lead to Fisher, Miller, and Pride’s book and the template that provided the backbone of the marketing plan. The template featured in Fisher et al. ordered the process logically to encourage further analysis based on previous work.²⁰ Therefore, the plan began with current activities, then looked at primary audiences, investigated potential avenues for marketing, and applied analysis to determine which avenues reach a given target group. The final step was to create tools based on the completed analysis that encourage systematic and thorough marketing that will create impact on specific target groups. This also corresponds with the strategy phase of the model shown above.

The first step of the marketing plan process was to create a detailed list of current activities and services. (See Appendix A.) Walters considered this project to be a step towards developing program objectives.¹⁹ This was the first time that such a comprehensive list was compiled. It was extensive and became a tool to assist discovery of program strengths and weaknesses of the library. It also determined the value of the services currently offered. After completing the list of services it became clear that quality resources, expert assistance in the minutiae of everything from patents and technical reports to ethics and interviewing skills, assistance with designing assignments, study space, and much more were the primary benefits to patrons. This list helped determine potential marketing messages.

After the completion of the first list, a detailed retrospective analysis of activity and resource marketing projects of the past was compiled. This analysis showed that the majority of marketing activities were carried out within the library building itself. In addition to this, library posters were distributed and chalking messages on sidewalks was used, particularly during orientation

and other special events. This tactical analysis, reflected in the flowchart above, aided reflection on previous marketing practices and provided insight into the patron groups that were previously the primary audiences of marketing projects.

Another round of research followed that profiled the patrons that were effectively being served through previous marketing practices and those patrons that were being missed. The primary patron groups, also known as target markets, represent a variety of groups from around the Colleges of Engineering and Technology, as well as across Purdue University and throughout the state of Indiana. Due to the diversity of these potential patrons, the information needed to complete this portion of the plan proved to be a major roadblock to its expeditious completion. The university collects a wide variety of data about primary patron groups down to the departmental level.²¹The available data needed to be placed into the context of library services. The university includes a variety of cultural markers such as newspaper consumption, video game usage, and internet surfing. This data has implications for the engineering library, but needed to be conceptualized in light of library services. That process was very intensive and resulted in more questions that indicated the need to collect more data.

Creating a truly rich plan required extensive time determining the target audience and available resources despite holes in the data. The limited availability of financial and time resources prevented a truly representative survey of all the students and faculty in Purdue's Colleges of Engineering and Technology although such a survey would provide the best information on library usage habits. Instead, library usage was approximated through statistics Purdue University Libraries collects during normal operations, from results of standardized surveys such as LibQual+™ (which provided feedback on the desires of selected primary patron groups), and through discussing ideas with students that interacted with library personnel during outreach reference and communication with student workers at the library. These sources were hardly comprehensive and left gaps that needed to be filled through additional data collection.

To supplement this data, a two-week long demographic survey was developed. It was intended to be completed with each transaction performed within the library, both at the reference and circulation desks. The survey used a small piece of paper with checkboxes on it for patron status and frequency of library use for the patron to check. (See Appendix B.) Patrons were asked to complete the survey during a transaction and return it. Upon receipt, the staff then marked whether the transaction was reference, circulation, or directional on the back of the sheet.

The results of this survey provided data about active patrons who came to the library and utilized library resources. They were also the audience of the promotional activities that were done within the library, including fliers, posters, and handouts. The survey gave insight into the current patron base in the library.

Status	Frequency n=223	Percentage Frequency
Freshman	13	6%

Sophomore	35	16%
Junior	29	13%
Senior	32	14%
Graduate	103	46%
Faculty	11	5%
Use Frequency	Frequency n= 223	Percentage frequency
First Time	40	18%
Regular	113	51%
Occasional	70	31%

Table 1 Demographic Survey Results

The cumulative results of the survey are shown above, with detailed results in Appendix C. The survey started out strong, but completion of the survey fell off substantially by the end of the first week. Student workers and staff at the circulation desk were inconsistent in asking patrons to complete the surveys. Therefore, by the end of the second week, the number of surveys completed fell from a high on the first Monday of 57 to a low on the final Friday of ten surveys completed. Due to this inconsistency in completion, the survey is not necessarily representative and provides only a glimpse of the active patron base.

Despite the incomplete participation, the results show that the primary patrons within the library were graduate students. Underclassmen and faculty were infrequent users of the service points in the library. The weekly transactions survey confirmed observations made by the staff at the service points and was further supported by a comparison of the current academic population of Purdue with the results of the demographic survey. (See Table 2). The library had previously been doing the majority of marketing activities within the engineering library, and therefore to a fraction of existing primary patron groups.

College	Status	Population
Engineering	Undergraduate	6,579
	Graduate	2,331
	Faculty	316
Technology	Undergraduate	3,804
	Graduate	317
	Faculty	139

Table 2 Demographics for 2008-2009 Academic Year – Headcount²¹

The door count numbers at Purdue Engineering Library, like those of most libraries in the U.S., have fallen in the last decade. The survey as well as the daily door count indicated that to reach the majority of existing primary patron groups, the marketing effort must shift focus towards other venues that reach into the sphere of influence of those patrons who do not come into the physical library space. This was in line with the literature recommendations as well.^{6,22}

The next step of the plan required development of tactics for reaching individual primary patrons and patron groups.^{19,20} Many mediums and venues for marketing were identified and analyzed to determine which target audiences the possible marketing venues reach. This portion of the plan required significant time to carry out. A library staff member was given the project of creating a list of as many physical venues (bulletin boards in engineering buildings, chalking sidewalks, student hangouts in engineering buildings, engineering fraternity offices) as possible, as well as collecting contact persons for email listservs for all College of Engineering and Technology-affiliated departments. Previously, the Purdue University Libraries' marketing professionals had compiled an extensive list of university-wide marketing resources that supplemented the list of physical distribution points. These included dorm flyer distribution, local access cable channel announcements, the student newspaper, and a variety of other sources that reached broader audiences.

The final step was to analyze which marketing venues worked for a specific primary patron audience. This process was called market segmentation, as is well explained by Lee.²³ The result was an easily referenced list that allowed us to quickly determine the most effective marketing venues for the target audience of a given service. The list was lengthy, and included the listservs, services, and locations that were available for use upon determination of appropriate target markets for specific programs.

In conjunction with the marketing venue list, a planning calendar was developed for the generic academic year. This calendar noted when events generally occur, and then counted back three to four weeks to indicate a time to begin the marketing development process. This provided plenty of time to notify or utilize the venues as necessary. This reverse calendar encouraged proactive marketing throughout the year to the marketing venues that are most targeted to given audiences. This was a major change from the traditionally reactive way that the engineering library marketed its services.

If the plan was to be successful, it would involve implementing new, lengthened preparation schedules for marketing and promotion projects in order to fully utilize all of the marketing venues. Previously, marketing preparation was generally started approximately one week prior to the event. (Resources were rarely marketed in a systematic manner.) The new plan required at least one month preparation for each project to allow time to develop the content of the marketing appeal, send it to liaisons for listservs and university residence hall media sources, and hang posters and flyers across campus.

Once a draft of the marketing plan was completed, it was important for the faculty and staff of the library to give feedback. As Andeen noted, the key to successful systematic implementation was staff buy-in to create a culture of marketing services.¹³ Therefore it was critical that the new marketing process was not significantly more work for the librarians and other employees, while supporting greater success for their services and instruction. A library staff member's role was expanded to include coordinating the planning calendar that kept the librarians and other staff

ahead of major events, or marketing appeals for specific programs and resources. (See Appendix D and E for the forms used by the staff member). The staff member reminded the library faculty in advance when upcoming events needed attention to develop marketing. This staff member also coordinated help from other library staff to create special displays, develop event announcements on the library website, and if appropriate, develop Facebook events. The staff member who was in charge of marketing at the engineering library was also a participant in the Communications and Marketing Council at the Purdue University Libraries-wide level and served as a liaison between engineering and the main libraries' marketing office.

Results

A significant allocation of staff and faculty time went into the production of the marketing plan. The resulting plan has been a valuable addition to the work flow of the Purdue University Engineering Library. The work done in support of the plan revealed a large number of marketing avenues for contacting students and faculty that have diversified the message delivery process. In a time of reduced financial resources, the work done on the plan exposed an extensive list of free or inexpensive marketing avenues. In fact, there are so many avenues that the challenge has become to select the most appropriate marketing avenues for specific target markets. An ongoing roadblock, the dispersion of the target audience across the Purdue campus, has become less difficult due to the discovery of marketing venues that are also dispersed geographically as well as across disciplines. While most traditional avenues reach only a fraction of a given target audience due to the size of Purdue University, specific venues can be selected to target specific audiences and correspondingly increase the effectiveness of marketing efforts. Multiple venues used in combination can reach virtually any patron group on campus.

The tools and work process that resulted from this process provided us with targeted information and a plan of marketing for any target group. The work process provided a proactive way to approach a marketing task, and enabled not only advanced preparation and implementation, but also the ability to meet an urgent marketing need (such as cross-promoting another department's instructional sessions just a few days before the presentation) quickly with confidence that the selected audience is likely to receive the message.

The plan continues to be a work in progress and has not been implemented for long enough to have statistical data regarding the success of emerging marketing methods. Library staff were disheartened that attendance was actually down from previous years during the first few events after the marketing plan was enacted. On reflection, staff concluded that low attendance could indicate that the marketing was ineffective and did not reach the target audience but could also indicate that the activities (specifically an open house and faculty tea) did not meet the needs of the primary audience. Therefore, reconsidering the activities as well as continuing to monitor and revise the marketing plan as needed appeared to be appropriate responses.

Conclusion

Forming and carrying out a marketing plan represents a serious commitment of time on the part of the point person or committee in charge of instituting such a plan. Benefits after implementation are primarily being able to respond proactively to marketing demands. The next topic to be explored is a method for tracking the effectiveness of specific marketing avenues to reach pre-determined primary patron groups. Possible methods to be explored in the future include surveys of participants during and after events, tracking statistics for hits on web based marketing venues such as Facebook, and monitoring attendance statistics or increased hits on web pages. Initially, response from the target audiences may not be pronounced, but over time, as the plan is successfully enabled, a culture of marketing could create a pervasive presence for the library that in turn creates awareness among the target audiences.

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Appendix A. Current Service Mix – This chart is based on Fisher et al. (2006).²⁰

Current Service Mix: Length, Width, and Depth

Educational Support	Informational Support	Research Support
In-Class Instruction (49 sections in 2007-2008, 4366 students)	In-Library Reference Service (1 site, 56; 68* hours/week)	Online database access (386)
Assignment consultations (3 classes, MSN)	Telephone Reference (1 site)	Electronic Journal subscriptions (2464 ¹)
Media collection of class sessions	Engineering Helpdesk sites (3 sites, 5 days/wk)	Print journal subscriptions (1253)
Patent instruction (3-6 classes per year, individual instruction)	AIM chat service (staffed when open – (56; 68* hours/week)	Patent Depository Library (1 Cassis machine, PubWest)
Teach the teacher instruction	Ask-A-Librarian (6 shifts /wk.)	Print standards collection (225/year; 28,215 total ²)
Course specific websites (6 websites)	Email reference (12 shifts / sem.)	Electronic Standards collection
Original instruction tools (Expert system)	Student group programs (WEP, MEP)	Original research tools (standards db)
Citation style training (APA, Chicago)	Subject weblibliographies (16 subjects)	Technical Reports collection
Reserves holdings	Reference by appointment	Codes collections
Group and Individual Study Space	ENGR seminars (6/sem.)	EndNote instruction
K-12 engineering education outreach	Open house (1x/yr.)	Online catalog of holdings
	Brochures publicizing services to profs	Purchase materials on request
	Staff development instruction	Microfiche/Microfilm collections and reader
	Facebook Friends group	Copyright training
	Engineering HelpTent (2)	Research center support (Regenstrief center)
	Meebo/Qwidget reference (staffed when open; 56; 68*	Data archiving

	hours/week)	
	New professors open house	Patent training seminar (4/sem.)
	Career seminar	

* First and last 3 weeks of semester

¹As of June 26, 2008 - SFX

²As of June 26, 2008 – Engineering Standards Database

Appendix B User Demographics Survey

Freshman

Sophomore

Junior

Senior

Graduate

Faculty

First time user

Occasional user

Regular user

Front of survey – completed by the patron

Reference Desk

Circulation Desk

Back of survey – completed by library staff member

Appendix C Data Frequency Table for User Demographic Survey

Patron Status	Frequency by day										Totals (n=223)			Percentage Frequency
	M	T	W	Th	F	M	T	W	Th	F	f	cf	p	
Freshman	6	0	1	1	0	0	0	3	2	0	13	13	.06	6%
Sophomore	8	10	2	4	5	2	0	2	1	1	35	48	.16	16%
Junior	13	6	3	1	0	0	3	1	1	1	29	77	.13	13%
Senior	5	3	5	2	1	4	5	1	3	3	32	109	.14	14%
Graduate	24	15	18	15	9	3	8	2	4	5	103	212	.46	46%
Faculty	1	2	5	1	1	0	0	1	0	0	11	223	.05	5%
Use Frequency														
First Time	14	4	6	1	3	3	1	3	4	1	40	40	.18	18%
Regular	26	15	20	11	14	3	10	4	5	6	113	153	.51	51%
Occasional	17	17	8	4	7	3	5	3	3	3	70	223	.31	31%

Appendix D Library Marketing Calendar

Marketing and Events Plan for July – June (Based on Fisher et al, 2006²⁰).

August	Student Organization brochures
	Brochures to target relevant student organizations. (Minorities in Engineering, NSPE, EPICS, HKN, etc.) Cost of printing.
	Marketing for revised website
	Use email, online tools, fliers, to highlight new website and new tools (facebook, tool bar)
August 25 – September 3: Welcome Tents	Two locations on engineering mall
	New Faculty Tea
	In conjunction with new faculty orientation. Cookies and Punch (Between \$100 and \$250.00)
	Reference Outreach begins (LWSN, EE, ARMS)
	Print handouts, etc. (50-100)
	Student Open House
	Across libraries. Snacks and Drinks. (550-1000) possible giveaways?
September - May: Engineering News, Goodies, and Resources	Print fliers (cost of printing)
September- December: Patent Seminar	Print fliers (cost of printing)
September – March: Career Seminar Series	Trialed last year. 4 seminars throughout the year. (Cost of drinks, snacks and printing: \$500?)
September 12 12:30 – 1:20: Patent Examiner Presentation	
October 22-26 Homecoming: Celebration of NASAs 50 th anniversary	Displays in library, career speaker from NASA?,
December 7 – 20: 24 Hour Library	Care package contest (unless handed out to advertise overall libraries). Relaxation corner. Coffee/granola bars. Masseur? (50.00) Yoga? Coloring contest? Lite brite contest?
January: Online resources marketing push	Highlight one resource a month through web, displays, handouts, classes, seminars (Cost of printing) January – Jane’s Online February – EngNetBase March – Safari April - Knovel
February 15 – 21: National Engineers Week	Celebration in library? Outreach to local libraries (recruit students to read science related books to kids after school? Cost of printing.
April 26 – May 9: 24 hour Library	Care package contest (unless handed out to advertise overall libraries). Relaxation corner. Coffee/granola bars. Masseur? (50.00) Yoga? Coloring contest? Lite brite contest?

Appendix E Marketing Initiation Form Sample – This is based on Fisher et al. (2006) ²⁰.

Action Plan Checklist for the Help Tents:

Promotion:

Task	Person Responsible
<input type="checkbox"/> See if we can be mentioned somewhere during Boiler Gold Rush, possibly on the ENGR Library leg of the Libraries' Amazing Race.	<input type="checkbox"/> Give out business cards – F will prepare them. <input type="checkbox"/> Note on ENGR Library Clue - M
<input type="checkbox"/> Post to e-Board and/or e-Sidewalk. Also use display case outside library.	<input type="checkbox"/> M will send notice to Kayla 8/18. M sent message to K 8/15. The display case was also completed on 8/15, in time for Boiler Gold Rush.
<input type="checkbox"/> Article in Purdue Today	<input type="checkbox"/> M will send to K. 8/18
<input type="checkbox"/> Chalk in strategic locations – high traffic areas – “Got ?s...”	<input type="checkbox"/> Recruit Volunteers – M 8/25 w/ updates through 9/3
<input type="checkbox"/> Signs for Tents	<input type="checkbox"/> ENGR Help Desk sign ready. Sandwich Board ordered for PSET Help Tent – will use eraser board markers on sign. Sign has arrived.

Things for the tent:

Task	Person Responsible
<input type="checkbox"/> Get Approval for location of tents – breezeway between Chem Buildings for ENGR and one near Schleman for PSET.	<input type="checkbox"/> M already sent request to Office of Space Mgmt. – approval given for both locations.
<input type="checkbox"/> Paper, stat sheets, highlighter, etc.	<input type="checkbox"/> F will take care of this.
<input type="checkbox"/> Candy/Freebies and container.	<input type="checkbox"/> M will get at Sam's Club.
<input type="checkbox"/> Library Handouts	<input type="checkbox"/> F has ordered the maps.
<input type="checkbox"/> Staff Scheduling	<input type="checkbox"/> D will send out an initial message to PSET this week. She will do the actual scheduling of both tents too – 8/25-9/3. – completed!
<input type="checkbox"/> Water & cell phone for staff	<input type="checkbox"/> F will lend her phone to those needing one. D & F will bring a thermos for water
<input type="checkbox"/> Set-up and take down of tent	<input type="checkbox"/> D will schedule as part of the daily schedule (7:30-5:30) *D will arrange w/ Aux. Services for delivery of 2 tables & 4 chairs for the first day.

G – Green - Project on Track /Completed

R – Red – Project is in danger of falling behind

Y – Yellow – Project is in danger of falling behind, is delayed partially