

Marketing of and Access to Special Collections in Public Libraries: Case
Studies in the East Midlands

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Abstract

The marketing of special collections has become increasingly important in the academic library sector in recent years due to the need to widen access and usage, and to re-enforce the value of these collections to stakeholders. Similar pressures exist in the public library sector, where financial restrictions often lead to the need to justify the continued retention of services and resources. However, little has been written regarding the marketing of special collections in a public library setting. This dissertation aims to rectify this situation by investigating how special collections are marketed in public libraries in a number of local authorities in the East Midlands.

The focus of the study developed from a comprehensive review of the literature regarding the marketing of special collections and marketing theory in the library sector. Predominantly qualitative methods of investigation were then employed to collect data. Unobtrusive observations of selected libraries using a set of predefined criteria assessed the current physical methods of promotion used, whilst a websites survey examined online promotional activity. A number of local studies/special collections librarians were then interviewed regarding their attitudes towards marketing and use of promotional activities, using questions based on the results of the two earlier data collection methods.

This report concludes that, in general, public libraries tend to prefer the use of physical methods of promotion for their special collections. These methods are most frequently employed within the libraries themselves, and less is done to promote collections away from the library. Public libraries also fail to maximise the potential of their websites, and a number of recommendations are made to help develop these sites into pro-active tools for the marketing of special collections, and to maximise the visibility of collections to encourage greater use. The report also notes a great variation in the amount of marketing activity that takes place in the various local authorities. It recommends the development of a set of county-wide guidelines offering suggestions of potential uses for special collections (focusing particularly on achieving goals set out in national library policy documents) and potential marketing strategies, to encourage a coherent approach to marketing and access to special collections at county level.

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1. Introduction

1.1 Background

This dissertation is an investigation into the attitudes towards, and applications of marketing in relation to special collections held in public libraries in the East Midlands, as well as how this impacts upon access to such collections. It is accepted by many that there needs to be a greater emphasis on the marketing of library services, and as Helinsky (2006:7) notes, “all of us [librarians] need to market the library better and more proactively”. However, as Brewerton (2003:268) observes, librarians “have not always had a good track record of marketing their services”, and Owen (2006:1) has uncovered difficulties that have developed when marketing the public library sector in particular, caused by a lack of coherence in national public relations work in the past.

That said, libraries and information services have moved to address this situation in recent years. Public libraries especially have made fresh moves to try to develop their public image, and to raise awareness of new services they have developed in the wake of reports such as “Building Better Library Services” (Audit Commission, 2002) and “Framework for the Future” [F4F] (DCMS, 2003). Meeson (2005) highlights a three year marketing campaign sponsored by the Museums, Libraries and Archives

Council (MLA) that has led to the implementation of various initiatives, and 2006 has seen the launch of the “Love Libraries”¹ campaign to promote reading to the general public.

The marketing of special collections has also become a more prominent area of discussion within the profession, as has been demonstrate by a growth in the related literature in the last six years (a trend also noted by Smith, 2005). The majority of the focus has been on practice in the academic sector, with emphasis firmly placed on increasing public awareness of collections (Abraham, 2001) and thereby increasing access to them (Traister, 2003). Similar issues exist for special collections in public libraries, but question marks remain over what measures are being taken to market such collections, the related effects on accessibility, and where local studies/special collections departments (these departments are generally combined in public libraries) fit into service-wide marketing initiatives.

1.2 Rationale

The subject matter for this dissertation came from the researcher’s own background in special collections librarianship and a personal interest in this field. Lectures attended regarding the marketing of services, and the public library sector in general, led the researcher to consider the role of special

¹ <http://www.lovelibraries.co.uk/>

collections in public libraries and whether they were being adequately promoted and exploited as a resource. Furthermore, it was later discovered that Smith (2005) conducted a project of a similar scale regarding the marketing of special collections in UK academic/research libraries. This work prompted the pursuit of a comparable study in the public sector, a vastly different field.

An initial examination of the relevant literature revealed that, in terms of the marketing of special collections, the majority of articles covered practice in the academic/research sectors, with little mention of public sector. Further examination revealed that there is also a substantial US bias in terms of the origin/focus of the literature specifically combining both special collections and marketing. These two factors posed an initial problem in that this particular research project is UK and public sector based (a problem which is examined further in the following literature review). However, this also presented an excellent opportunity to conduct new and valuable research in an area that has been neglected in much of the mainstream library literature.

In terms of scope, a survey of all public libraries holding special collections across the UK was not feasible given the limitations on time and resources. Therefore a regional approach was adopted examining one specific region in particular through a number of case studies. The East

Midlands was chosen as the target region after consultation with tutors and staff from Library and Information East Midlands. Their recent collaboration with the University of Northampton to map the location of special collections in the region through the “DiadEM” project made them the ideal choice, as this allowed the identification of comparable collections within the region’s local and unitary authorities. Furthermore this allowed the easy identification of suitably similar subjects that could be used as case studies.

This dissertation aims to research an area of special collections librarianship that has often been neglected in the past, and will hopefully result in further interest and research being carried out in the future.

1.3 Definitions

Before any investigation can take place it is necessary to provide a suitable definition for a number of key terms, thus providing a frame of reference within which the following research can be examined.

1.3.1 How do you define a “special collection”?

The term “special collection” in relation to library holdings poses problems when conducting research because its meaning is ambiguous. Unless a meaning is spelt out clearly it can be many things to many people. For

example, as a former Oxford college librarian, the researcher would initially relate the term to manuscripts, incunabula and books from the hand-press era. However, as a librarian with responsibility for special collections of science, technology and medicine, Wagner (2002) could argue that both 15th century manuscripts and 1960s textbooks could come under his remit. Likewise, Basinski (2002) would also admit something written this year into his collection of underground poetry, providing it matched the subject criteria. Tovell (2005:3-4) notes the diverse nature of special collections, particularly across sectors, and perhaps a similar observation led Bengston (2001) to describe the use of the term as “relative”.

This suggests that a description should be comparatively broad in terms of what it encompasses. This is the approach that has been adopted by a numerous national library associations and bodies. CILIP (2005) says that:

“the most common dividing line [between special collections and general collections] is based on date of production, with all books made before a certain date automatically defined as rare books, but other criteria apply such as rarity, value, local interest and provenance”.

Hewitt and Panitch (2003) report that America’s “Association of Research Libraries” (ARL) have taken a similar approach, but with the inclusion of:

“many other types of materials that libraries might separate from general collections for special curatorial treatment”.

Smith (2005:3) attempts to broaden her meaning of the term by including the term “a broad range of material” in her definition. However, by giving examples of the type of materials she identifies with (namely rare books, manuscripts, and collections of modern ephemera) she narrows the perception of what the term “special collections” covers. For instance, all of the materials mentioned above are likely to be heavily text-based, possibly leading the reader to exclude collections of tinsel pictures, for example, which appear in a number of library special collections in the UK.

Love and Feather (1998:215) have devised an excellent definition which depicts the qualities of a special collection admirably without the restrictions of specific examples:

“[Special collections are] collections of materials which are distinguished by their age, rarity, provenance, subject matter or some other defining characteristic”.

By not mentioning specific types of materials but providing a contextual framework within which such collections can be placed, this definition lends itself to a wider range of possible collection content. This is particularly useful when applied to public libraries, where materials relevant to this study may vary in nature from manuscripts, to postcards, to maps of the

area, and are often incorporated into a local studies collection (Tovell, 2005). Therefore, for the purposes of this research Love and Feather's definition of special collections will be used.

1.3.2 Marketing

It is a popular misconception that the terms "marketing" and "promotion" are in some way interchangeable. Weingand (1999:7) suggests that promotion has "too often [...] been considered the definition of marketing", and this is in her opinion a grave misconception. De Sáez (2002) has commented that, whilst promotion and publicity have an important part to play in the marketing process, they are only one part of that process and alone can be ineffective. In fact, marketing theorists have developed a number of multi-faceted models to describe the term "marketing". De Sáez (2002), Coote and Batchelor (1997), and Weingand (1999) agree that marketing can be successfully summarised by the model of the "marketing mix", otherwise known as the 4 "P"s. These are "product", "price", "place" and "promotion". However, such terms probably sail too closely to the philosophy of retailers for many working in the library and information profession, and almost certainly for those working in the public library sector where the emphasis on free provision still holds firm as a mantra for most services on offer. However Levitt (1960:50), in his seminal paper "Marketing myopia", sheds a less commercial light on the topic:

“The difference between marketing and selling is more than semantic. Selling focuses on the needs of the seller, marketing on the needs of the buyer”.

This philosophy is potentially more appealing to service based industries. Kotler (in De Sáez, 2002) has since developed an alternative to the marketing mix specifically focusing on the needs of the “consumer”. The “buyer’s” or “customer’s mix”, comprises 4 “C”s, namely “customer value”, “user convenience”, “user cost” and “user communication”. The customer-centric nature of this model is ideal for use within a public library setting, and it sits well with Kotler’s (2000:2) assertion that “marketing deals with identifying and meeting human and social needs”. Indeed, the combination of this user-oriented marketing philosophy with elements of wider societal considerations provides an excellent frame of reference for the marketing public library services.

It should be noted, however, that marketing is a vast topic and, as Smith (2005) recognises, it is too large to examine fully in a study of this size. Therefore this dissertation will focus mainly on investigating the methods of promotion used to advertise and raise further awareness of special collections materials (promotion being defined here as the “various communication techniques [...] available to the marketer to achieve specific goals” (IFLA, 1998)). It will also examine the nature of the clientele and, more specifically, how effectively public libraries identify current and

potential user groups. These elements will be discussed further in the following literature review.

1.4 Aims and objectives

The aims and objectives of this particular research have been developed after careful evaluation of the literature regarding both marketing theory, and marketing practice within the field of special collections librarianship. This has resulted in the following:

Aims:

To investigate the marketing practices that public libraries adopt in relation to their special collections, and their relationship to access to those collections.

Objectives:

1. To identify the current methods for the marketing of, and access to special collections within a set of five case studies chosen from the East Midlands region, and ascertain how they fit in with current practice as established by a review of the literature.
2. To examine any trends that emerge regarding the aforementioned methods in both the physical library and on the Web and to see

whether current and potential marketing methods relate to the achievement of national library policy goals.

3. To provide practical, affordable suggestions of how better to market special collections in the aforementioned public library services (taking into account the limited funds provided by the public purse), and thus how access to these collections could be improved.

1.5 Structure of the dissertation

This dissertation will be split into a number of distinct chapters. Chapter two is devoted to a literature review, examining current methods of the promotion of special collections and the nature of user groups as a backdrop to the forthcoming investigation. Chapter three focuses on methodology, discussing the reasons for using a case study framework, explaining the various data collection methods used and examining ethical issues and how they were addressed. Chapter four to chapter eight inclusive identify attitudes towards/main methods of promotion used in the case study, with a chapter devoted to each. Finally, chapter nine examines trends and issues that arose from the study, makes recommendations for actions that could be taken to develop marketing of/access to special collections in public libraries, and draws some final conclusions.

2. Literature Review

This chapter discusses the main written materials surrounding the subject matter covered by this study, thus forming a backdrop for the results of the investigation. The literature review is divided into six distinct sections. Part one discusses the limitations of the literature in relation to the public library sector, and comments on the US bias perceived by others in the past. Part two examines where special collections stand in the context of the 21st century public library remit. Part three is a general discussion about marketing and public libraries, whilst part four looks more specifically at the marketing of special collections. Part five examines a wide range of promotional activities, divided into two sections: physical promotion and Web-based promotion. Finally, the review looks briefly at the special collections user groups and the difficulties of identifying user-types in a public library setting.

Certain aspects are more fully covered in the literature than others, and this is reflected in this review. For example, it is perhaps unsurprising that, in this digital age, electronic catalogues are discussed at greater length than physical finding aids such as card catalogues. However, some of the newer technologies are less well represented in the context of special collections librarianship, and in such cases their potential benefits and/or drawbacks will also be discussed.

2.1 Limitations of the literature, and potential US bias

Whilst reviewing the literature available regarding the marketing of and access to special collections, the researcher has discovered a significant limitation, namely that there is very little written directly about the marketing of special collections in the public libraries sector. This was, to a certain extent, predicted by an initial scoping survey. However, the lack of directly relevant materials is potentially problematic when comparing marketing practice. Marketing in general has begun to feature more prominently in the public library-based literature since the turn of the 21st century and this has been drawn on for the purposes of this study. However, there has been no alternative but to look to the academic library sector to a certain extent, as this is where the majority of literature regarding special collections librarianship has been generated in the past.

However, this information has to be used with the public library sector in mind. Papers discussing large digitisation projects such as the Google Print initiative² may well be relevant to the debate around the marketing of and access to special collections in general, but due to the incomparable size of the financial backing available for such ventures, they will bring little to this particular debate. Likewise, articles discussing the prosecution of a large cataloguing project such as the University of Oxford's

² <http://books.google.com/googlebooks/library.html>

Early Printed Books Project³ will also contribute little to a discussion surrounding the public sector as the vast resources required are, realistically, unavailable. Therefore, great care has been taken to choose literature grounded in the academic sector that either covers a particular method of promotion in detail (for example, Traister (2003) covers outreach and public services in a special collections context), or that examines projects and initiatives on a scale conceivable in the public sector, such as Attar's (2003) recollections of electronically cataloguing the Durning-Lawrence collection. As a result, the pool of resources available to the researcher has been narrowed.

Smith (2005) notes a significant US bias in terms of the literature relating to the marketing of special collections in academic and research libraries. One year on, this trend remains in evidence despite some notable additions to the UK-based body of knowledge. However, due to the public library focus of this particular study, the balance between US and UK resources used is more evenly weighted.

2.2 Special collections in the context of a 21st century public library remit

Unlike in the academic and independent library sectors, public libraries (like many other public sector organisations) are under pressure to fulfil a

³ <http://www.lib.ox.ac.uk/icc/>

number of political goals and to meet targets set by both local government and at a national level (Rowley, 2005). "F4F" (DCMS, 2003), the seminal report on the future direction of the UK public library service, suggests a number of areas where the service should direct its attention. The promotion of reading and informal learning, access to digital skills and services, tackling social exclusion, and fostering digital citizenship are just a few examples. The document itself gives the impression that special collections and local studies departments are now a low priority, with no explicit mentions for this field of expertise and only a passing mention of the desire to create more online content for local/family history (DCMS, 2003:36). Combined with the introduction of local council annual efficiency measures, requiring £146 million savings and with an emphasis firmly placed on streamlining performance in library services (Gershon, 2004), this does suggest that budgets for niche disciplines such as local studies may bear the brunt of any cuts.

Such a situation is by no means inevitable, however. Increasing the use of collections can help to justify their continued existence (Brewerton, 2004), but even more can be done to safeguard the future of public library heritage-based holdings. The potential of such collections to contribute to the achievement of goals set out by politicians must be made clear to those politicians and policy makers. The nature of these contributions is discussed below, but it is clear that in order to prevent the

development of what Traister (2003:90) describes as a “use it or lose it mentality amongst policy makers, special collections must be marketed effectively to both current and potential user groups to increase usage, and to higher management within the library service and local government to convince them that the collections are worth investing in.

2.3 Marketing and public libraries

Librarians have not always been the best at promoting themselves or their services in the past (Brewerton, 2003; Traister, 2003). Helinsky (2006:7) tentatively suggests that “not all of our colleagues are keen on marketing”, a statement that possibly understates the hostility felt towards the concept by certain librarians, as epitomised by one of Smith’s (2005:60) respondents who states that:

“I do not use this concept: the idea of the commercial hard sell seems completely wrong to me”.

Be it through a lack of understanding of the needs for/rationale behind a marketing policy, or through a genuine hostility towards the adoption of what has traditionally been seen as a commercial activity, such an attitude is evidently still alive in certain quarters of the profession.

Although there is little evidence to prove it, it is conceivable that those operating in the public library sector may be more susceptible to such attitudes due to the emphasis placed on free provision of services to the public where possible. Any perceived drive towards commercialism may cause disquiet amongst those unaware of the reasons behind such actions.

What is clear is that, until relatively recently, public libraries have lacked any clear and coherent marketing policy. A report by the Audit Commission (2002) acted to highlight the main problems facing libraries regarding marketing and promotion. Their survey of users and non-users of public libraries revealed a number of damning responses to the question of libraries and their visibility in the community. One non-user noted that libraries:

“need to [be made] more appealing. People need to know what they have to offer and how [they] have been improved”. (Audit Commission, 2002:13)

More worrying still is the view of one current user who commented that:

“It’s a publicity issue isn’t it? You forget about the library. People forget that it exists as a public service. There is no advertising”. (Audit Commission, 2002:13)

It would appear that, rather than having a poor image that is causing potential users to be put off using the services on offer (a situation

hypothesised by Olson, in Brewerton, 2003), public libraries have suffered from a lack of visibility and image, and confusion regarding their role and remit (Meeson, 2005).

However, since the publication of the Audit Commission (2002) and DCMS (2003) reports, public libraries have worked hard to develop marketing programmes that target new users. Meeson (2005) describes the allocation of £500,000 by the Museums, Libraries and Archives Council (MLA) to a three year marketing push, which has included market research and focus groups to identify future user groups (which Wilson, Gilligan and Howsden (1995) see as essential), rather than focusing solely on present users or, worse still, trying to target *all* the “public” (which is surely impossible with such a limited budget). Furthermore, in the “Love Libraries” campaign⁴ there is evidence of a joined-up approach to the marketing of public libraries across England⁵, with the website acting as both an introduction to what libraries can offer, and a gateway to local library websites and online services such as the People’s Network.

Having recognised the need to market public libraries and their services to both users and non-users, their next challenge must be to convince an ever more cynical public that the benefits that they can provide are indeed genuine (De Sáez, 2002).

⁴ <http://www.lovelibraries.co.uk/>

⁵ The “Love Libraries” campaign only covers libraries in England, thus excluding Scotland, Wales and Northern Ireland.

2.4 Marketing and special collections

Special collections have traditionally been seen as the preserve of the elite (Zanish-Belcher, 2003), and this is perhaps reflected in Traister's (2003:88) stereotypical take on rare books librarians as the epitome of "the formality and repulsiveness of many rare book collections large and small". This is perhaps more indicative of the perception within an academic setting than within the public library sphere, but the image of a collection and its "guardians" is never-the-less an important element that must be addressed when formulating a marketing policy. After all, as Brewerton (2004) starkly reminds his readers "if these [...] collections of old books, letters and other ephemera are to earn their shelf space they need to be used".

The idea that special collections in public libraries may be sold, or somehow be disposed of seems implausible, especially as libraries (along with other cultural institutions such as museums) are seen as "[guardians] of cultural heritage documentation" (Liew, 2005:5), but in the current political climate, where substance often appears subservient to image, negative publicity for a collection could easily result in its demise. Local councils are not above selling cultural heritage artefacts, as Bury council's proposed sale of an L.S. Lowry painting to balance their annual budget testifies (BBC, 2006).

The effective promotion of special collections using a number of different methods (discussed in detail below) can affect their image for the better⁶, which may help to negate the development of the scenario mentioned above. For example, promoting special collections as a resource for genealogy (one of the most popular forms of self-motivated learning (Liew, 2005)) pushes the right buttons for politicians in terms of fulfilling the goals of “F4F” and may enhance the collections’ worth in their eyes. However, such promotional activities can also have more direct positive effects. Increased visibility resulting from a variety of promotional activities (ranging from publishing newsletters, to creating online exhibitions) can result in better access to collections. The importance of access to collections cannot be underestimated (Liew, 2005; Parasuraman, Zeithaml and Berry, 1985; Sambrook and Donnelly, 2006; Saunders, 1994). As Normore (2003) notes:

“the value of a collection’s content derives from access. If people don’t know the content is available it won’t be used. If it’s not used, it won’t be valued”.

Increased access can lead to increased user numbers and thus justify the maintenance of special collections in the wider context of a public library’s holdings.

⁶ Brewerton’s (2001) efforts to re-brand a library (and to some extent librarians) are one example of promotion having a positive impact on image.

Promotion is, of course, only one element of marketing (De Sáez, 2002). Starting with the customer (be they current or potential) is also an essential element of the marketing process (Baker, 1987). In other words, to market effectively you must know your market. Coote and Batchelor (1997) suggest that:

“Contemporary marketing is customer-focused, which means that you base the design of your service as far as possible on what customers want, not what you happen to have available”.

In terms of special collections this is not necessarily an easy principle to apply because, to a certain extent, holdings will remain static, and it is not possible to offer a service or a resource that you do not have or your holdings cannot accommodate. However, the customer’s needs should be fulfilled as far as is possible (Melrose, 1999), especially in a public library context. Knowing the current and potential market for the special collections can help with the process of tailoring services based on both the needs of the user and the resources to hand. This in turn can exploit the resource to their full potential and allow librarians to devise and implement focused and effective promotional initiatives.

2.5 Methods of promotion

Promotion is a very important part of the marketing process, and there seems to be a growing recognition amongst special collections librarians of the need to promote their holdings (Traister, 2003). Promotion in the context of libraries can be split into two distinct categories: physical and Web-based methods of promotion, both of which can be subdivided into various activities. There is no shortage of advocates for either category. For example, Bowen and Roberts (1993) and Prendergast (2003) are supporters of certain physical methods of promotion, whilst Balas (2002) and Attar (2003) note the benefits that electronic promotional practices have to offer. Of course, use of one method shouldn't restrict activities related to the other – indeed one can easily enhance the other and vice versa (Abraham, 2001) – but for the purposes of this review they will be examined separately.

2.5.1 Physical methods of promotion

Exhibitions

Exhibitions have been part of the librarian's promotional armour for many years, perhaps because displaying library holdings is the most obvious way of drawing attention to them. Certainly the benefits have been noticed in the archival world, where the literature describes exhibitions as “worthwhile”

and “a major component in public outreach programs” (Bowen and Roberts, 1993:408). Brewerton (2004) comments that displays of resources are one of the cheapest and most effective marketing methods available to libraries. This no doubt adds to their appeal, particularly in the public sector where funds are often in short supply. However Normore (2003) takes the opposite view, suggesting that physical exhibits “are costly to create and maintain”. To a certain extent both views are true, but the positives that can be drawn from physical displays almost certainly outweigh the negatives.

Exhibitions can have a positive effect both in terms of public relations and education provision (Prendergast, 2003) and in terms of raising the profile of collections (Gifford, 2002). They can therefore offer valuable opportunities to contribute to the fulfilment of a number of the “F4F” criteria.

Seminars, talks, special events and activities

Talks and seminars also form part of traditional library promotion activities, and are seen by Coote and Batchelor (1997) as methods that should continue to be used. Talks on specific collections are perhaps one of the key selling points for special collections librarians who work with such collections constantly, and are knowledgeable of their contents, and Melrose (1999) highlights the frequency with which local studies librarians are called upon to give talks about resources in their collections. Talks can

also be delivered to a wide variety of clientele, not just core user groups (as Sambrook and Donnelly (2006) have noted), and this can widen the outreach potential of the library service as a whole, thus promoting an enhanced perception of that service to a wider audience (Bengston, 2001).

Special events and activities are more difficult to characterise as they can include such diverse elements as behind the scenes tours of library facilities, to taking special collections materials into school classrooms (Traister, 2003) in the style of the American “show and tell” concept. Little is written about the effects that such events have on user figures, but Melrose (1999:12) is clear that as an outreach tool they can act as “a means of reaching individuals and groups who are not traditional library users” and therefore they have to be seen as positive promotional initiatives.

Publications and other merchandise

Publications can come in all shapes and sizes, from professionally produced monographs to local newsletters printed in the library. The former are often catalogues published alongside other outreach events such as exhibitions, or as a result of specific cataloguing projects (Traister, 2003). However, as a result of the growth in popularity and affordability of desktop publishing in the late 20th/early 21st century, as well as restrictions on library funding, there will almost certainly be a decline in the production of formal

publications and a proliferation of home-grown mini-publications such as newsletters. Whilst not as aesthetically desirable, such mini-publications have the advantage of offering the same (or similar) intellectual content for a fraction of the cost. They also have the advantage of being readily updatable, so new information arising from research can be added quickly and easily without the involvement of a third party.

The provision of free merchandise such as postcards, bookmarks, and pens can be a useful tool for re-enforcing other promotional activities (Brewerton, 2001; 2003). If developed with a particular product in mind they can stir interest amongst new user groups by being informative and intriguing at the same time, as demonstrated by the use of specially designed beer mats to promote the presence of the National Brewing Library at Oxford Brookes University (Brewerton, 2004).

Posters and fliers

Posters and fliers are primarily used to publicise upcoming events or other promotional activities such as exhibitions (Prendergast, 2003), and mass distribution can be quite successful in raising awareness (hence the continued use of leaflet drops and billboard advertising by commercial companies, alongside Web-based modes of promotion). They share the same low cost and ease of mass production benefits that make the aforementioned home grown mini-publications so popular and viable, whilst

offering the additional bonus of providing an easy way of increasing the library's visibility outside its confines (Steele, 1995). This last point is particularly pertinent given the criticism levelled at public libraries by the Audit Commission (2002:24):

“Much of the promotional work that is undertaken by library services takes place in the library building [...] and is only seen by current users”.

Card catalogues and handlists

Card catalogues, handlists, and printed catalogues are often seen as antiquated methods of providing access to collections. With an increased emphasis on Web-based finding aids apparent from the literature in recent years it is initially hard to see the use of physical catalogues as anything other than a retrograde step. Indeed, Gray (2005) draws attention to the inferiority of physical catalogues due to the limited information they often provide (often just title and author details) and the restrictions on updating them (although he concedes that card catalogues don't pose the latter problem). It is true that the fixed location of such catalogues restricts the visibility of, and therefore access to collections. However, they do have their benefits. Handlists in particular can represent either the physical or intellectual organisation of a collection (Normore, 2003). This can be especially useful in the case of special collections where such information may form an important part of a collection's provenance history. Saunders (1994) claims that research can be made easier if physical or intellectual

browsing can be carried out. Foster and Ford (2003) agree, noting the benefits that serendipity can bring to the searching process. As many special collections are (necessarily) kept in closed access (Traister, 2003) physical browsing is prevented, and perusing a library handlist remains the only browsing option, as browsing electronic catalogues is more difficult because of the way records are structured and stored.

2.5.2 Web-based methods of promotion

The internet is still a comparatively new technology, particularly when compared with the long history of the library as a concept, but it has quickly developed into a medium that cannot be ignored by any institution. Library websites have the potential to enhance services for users (Abraham, 2001), act as a first point of contact for new customers (Brewerton, 2002) and act as a promotional tool in the process. They can also be used to showcase research and resources (Traister, 2003) and generate new resources (Jay and Webber, 2004). However, to successfully achieve this goal library websites should be accessible, usable (i.e. easy to navigate) and easily searchable (Ould and Burton, 2005). If these targets are achieved, the benefits of a library website will far outweigh the cost of development.

Perks such as twenty-four hour access to certain services and virtual tours of facilities to encourage users to visit the library's physical

space are just two examples of the impact of the Web on library services in general. Such benefits can also be extended to special collections/local studies facilities. Specific methods of promotion will be discussed below, but Reid (2003) has drawn attention to the general use of web-pages in local studies librarianship. He is clear that there are two main types of local studies websites: informational and interactive. He favours the latter to the former, citing their greater contribution to educational objectives.

Informational sites can be beneficial as finding aids, but if poorly constructed can result in the production of an inferior resource of little use for either locating or promoting collections. Sadly, in the US at least, this would appear to be the case for numerous public libraries. Normore (2003) found public library websites to be most wanting in a cross-sector analysis of cultural heritage institutions.

Online finding aids

Online finding aids and catalogues in particular, have a role to play in both the marketing of special collections (Gray, 2005) and in increasing their accessibility to a wider audience (Allen, 2003; Gray, 2005; Srivastava, 2004). Attar (2003) lists the benefits of an electronic catalogue as the provision of multiple access points to records, increased speed and precision of searching, and the ability to search from anywhere in the world. Saunders (1994) agrees that the digitisation of catalogues has increased the speed of searching but contests the issue of greater access, arguing

that as the theory behind cataloguing hasn't really changed the process of access effectively remains unaltered. This is a blinkered view which perhaps reflects the age of the article, but is nevertheless an argument that must be considered.

The benefits of retro-conversion projects (transferring physical catalogue records onto electronic systems) seem to be widely accepted in the world of special collections librarianship (Attar, 2003; Bengston, 2001). However, the great cost of skilled labour required for such projects (Attar, 2003) is a barrier that needs to be negotiated, particularly in public libraries where excessive costs of cataloguing and maintenance may be seen as outweighing the benefits of a resource (Bengston, 2001), particularly in the eyes of politicians keen to make savings to a local government budget.

Saunders (1994) advocates the production of collection level descriptions as an affordable overview of special collections, and such methods are useful, despite Reid's (2003) hostility towards them. Although electronic handlists, digitally imaged card catalogues and general descriptions of collection coverage are in many ways inferior to providing detailed catalogue records, they are better than providing no information at all. Their presence at least draws some attention to the existence of a collection, and this must be seen as a positive step (all be it a small one)

towards increasing access to collections and promoting their availability for use.

Online reference tools

Very little has been written about the potential of online reference tools provided by e-mail and Web 2.0 innovations when applied in a special collections setting. This is certainly an area that could be exploited for promotional purposes, and more studies need to be instigated to investigate this area further. Some brief observations are noted below:

E-mail enquiries and online enquiry forms

Reid (2003) points out that e-mails are now the most common form of enquiry received by libraries. The benefits of e-mail and online enquiry forms are the speed and reliability with which an enquiry can be made from anywhere in the world in comparison with traditional “snail-mail”, as well as the increased access to information for those who are unable to visit the physical library (Jay and Webber, 2004). There are however drawbacks. The increased speed and ease of e-correspondence can lead to a vastly increased numbers of enquiries that have to be answered by a finite number of staff, and a heightened level of expectation regarding the length of time taken to respond (Reid, 2003). This can place undue pressure on staff, particularly in local studies libraries where enquiries regarding

genealogy or local history may be complex and require the searching of numerous non-digitised resources.

Bulletin/discussion boards

Reid (2003) notes that the use of bulletin boards on a local studies website can be used to encourage researchers to make contact with each other and develop debate about collections and other relevant subjects. Certainly the benefits have been noticed in the academic sector. Reddy's (2004) analysis of the posts on the Texas A & M University ranch management boards revealed that 97 percent were either enquiries, responses to enquiries or people writing to agree with points that were made in a particular communication strand. Fitcher (2005) also lists them amongst the many forms of e-collaboration now available on the Web, and this collaborative ethos is one that could be successfully fostered amongst special collections users to create online communities and to help encourage the engagement of non-users by exploiting a medium that is not traditionally associated with local studies.

Weblogs

Weblogs (or blogs) are a form of online diary. They have been traditionally used by individuals as a method of self expression and communication with others via host websites such as Livejournal⁷ and Blogger⁸. However, the

⁷ <http://www.livejournal.com/>

⁸ <http://www.blogger.com/start>

potential of such technology as a method of communication has led to businesses (Fitcher, 2005) and even the media using blogs to relay information to the public⁹.

There are numerous advocates for the use of blogs in libraries.

Ojala (2005:275), for example, urges us to:

“Think of a library blog as a marketing tool and a way of informing your users of your collections and capabilities”.

Prasad (2004) agrees that blogs have great potential for marketing libraries but recognises the need to characterise your target audience and so that key messages can be relayed to that audience. Whilst blogs may not be a suitable medium for providing detailed answers to specialist enquiries such as those regarding genealogy (Reid, 2003) they can have a number of uses in a special collections/local studies context. They can be used to answer basic or frequently asked questions, thus providing a searchable FAQs page that is being regularly updated. They can also be used to highlight upcoming events and promote resources. Perhaps most importantly however, they have the potential to draw in a new set of users who may discover the library through blogging rather than through more conventional methods, and at the same time demystify and personalise librarians who have so often been seen as barriers to access in the past (Traister, 2003).

⁹ a good example being Nick Robinson's BBC news blog - <http://www.bbc.co.uk/blogs/nickrobinson/>

Digitised materials

Digitising special collections holdings can have a number of advantages and disadvantages. The mounting of materials and exhibitions in cyberspace can increase the potential for contact with collections from a comparatively small number of local people (and those willing to travel to see them) to millions of people worldwide (Balas, 2002; Bengston, 2001; Zanish-Belcher, 2003). Widened access to collections also produces heightened visibility of the library and its stock as a by-product, which can have very positive effects on public relations (Liew, 2005; Normore, 2003), as well as on user numbers (both in terms of website hits and physical visits to the library).

The production of an electronic surrogate can also prove a useful way of preserving original materials which may become worn and damaged through continual use (Balas, 2002; Srivastava, 2004), and whilst the use of such surrogates can never replace the feeling gained from handling the original (Bengston, 2001) they can give a reasonably accurate idea of what the original is like.

The use of digitised materials in online exhibitions can also have a positive educational impact. Bowen and Roberts (1993) note that the multi-media nature of physical exhibitions can actually aid learning through their

visual and interactive nature. By reducing physical restrictions (Prendergast, 2003) online exhibitions can increase interactivity with materials and hopefully encourage learning through the use of a more constructivist pedagogical approach. Abraham (2001) also recognises the benefits of providing a visual online presence for a collection, and by asserting that an image can be far more informative than several paragraphs of text he lends credence to the old adage “a picture paints a thousand words”.

As with most projects, cost is a factor that must be considered when instigating a digitisation project, particularly in the public sector. Traister (2003) thinks that digitising collections can be costly, both in terms of financial outlay and the time/effort needed to bring such a project to fruition. Bengston (2001) is, however, more optimistic, suggesting that the process of metadata creation (for cataloguing purposes) and the maintenance of a resultant database is more expensive than a digitisation project in the long term. However, in the public sector the needs of the user must come first where possible (Melrose, 1999), and this may ultimately dictate whether the digitisation of collections is considered or not.

One way of spreading the cost of such ventures is for libraries to enter into collaborative projects. These may be instigated between local authorities, but cross-sector collaborations are also viable, and often highly desirable. Royan (1998) recognises that users aren't interested in the

politics behind where collections have eventually been housed. They just want to be able to gain access to them. Recognition of this fact has led to the development of projects such as “Inspire” which aim to:

“provide a seamless cross-sectoral pathway for learners across public, academic and national libraries”¹⁰

and which can hopefully help to increase access to special collections in public libraries by raising awareness from local to national/international level through the use of online finding aids in the short term, and potentially through collaborative digitisation projects in the future.

2.6 Special collections user groups

The identification of user groups (current and potential) is a key part of marketing, as it creates a focus for future promotion campaigns. To a certain extent the identification of special collections users is more straightforward in the academic library sector than in public libraries. The vast majority of users will probably be students, researchers or academics, as these are the natural customers of the academic library. They fit soundly within a general academic library remit. But what of the public library? The term “public” widens the net of potential users dramatically. Kotler (2000:605) defines “the public” as “any group that has an actual or potential

¹⁰ <http://www.inspire.gov.uk/>

interest in or impact on a company's ability to achieve its objectives". If the public library is viewed as the "company", then the potential number of stakeholders is enormous. Identifying current users can be easily achieved by conducting user surveys, but deciding which non-user groups to target is much more complicated.

Meeson (2005) describes an objectives-focused approach to targeting, whereby a number of objectives are initially defined and then target groups are identified along demographic lines, with the chosen groups being those who would receive the most benefit from the aforementioned objectives.

De Sáez's (2002:45) adaptation of Ansoff's "product-market development strategy matrix" offers a product-focused alternative, where the product/service and its current market are used as the starting point from which from which decisions are taken regarding the development of that product/service or the expansion into new areas to gain new markets.

Due to a combination of the relatively static nature of special collections holdings and the emphasis placed on providing services all in the public library sector, Meeson's objectives-focused approach to determining which markets to target seems more appropriate. This method is still not wholly satisfactory as the finances to conduct the necessary

market research professionally may not be available. It does, however, provide a model which librarians can themselves instigate on a small scale, thereby providing *some* evidence upon which to base a targeted promotion campaign.

3. Methodology

Having established a suitable topic for investigation through a survey of the literature, the next crucial phase of research is to establish the methods that will be used to conduct the investigation. Establishing a series of methodologies that are suitable for achieving the aims of the project is essential to its success, and to the reliability of the findings. This chapter examines the methodological framework adopted for this study, and the reasons behind it. Additionally, it will also describe the nature of the data collection methods employed, and the methods of data analysis used. Finally, some reflections on the research process are put forward and a timetable for the undertaking of the research described.

3.1 General methodological approach

As the investigation focuses on the East Midlands region, which in turn contains nine independent local/unitary authorities, each operating their own public library service, it was decided that there wasn't enough scope for a blanket survey of special collections libraries and librarians in the region. The risk of a lack of co-operation from one or more of the individual authorities would have reduced the number of responses for general surveys to an unacceptably low level.

Therefore, it was decided to adopt the use of case studies for the investigation, with one local/unitary authority representing one case study. Case studies are an excellent way of collecting descriptive data (Paris, 1988) and are therefore ideal for this particular study. The case study model in this project is being used as an exploratory tool (Yin, 1994) to establish current practice in the marketing of special collections within the East Midlands region. In order to achieve this effectively a multiple case study approach with multiple units of analysis applied to each one (or what Yin (1994:33) would describe as a “type four” project in his case study design matrix) was chosen. This promised to provide an overview of marketing activities within a particular case and allow the researcher to draw parallels of practice across a representative sample of authorities from the region.

In terms of the data collection, primarily qualitative techniques such as unobtrusive observations and interviews (Powell, 1991) were employed. Gorman and Clayton (1997:23) describe qualitative research as:

“a process of enquiry that draws data from the context in which events occur, in an attempt to describe these occurrences”.

The predominant use of qualitative research is therefore well suited to this descriptive, exploratory investigation. However, there are certain instances where quantitative elements of data collection are in evidence, for example

the number of digital images to be found on the special collections/local studies section of a library website was recorded as part of the Web surveys. These were included to show the degree to which certain methods of promotion currently being employed, and hence their presence is necessary to enhance the qualitative elements of the research.

3.2 Ethical considerations

The consideration of ethical issues is an essential aspect of research projects, particularly those involving direct human participation. Gorman and Clayton (1997:46) note that:

“All research subjects have ethical rights: to be consulted, to give or withdraw consent, and to confidentiality”.

This principle was reflected in the need for this project to undergo formal scrutiny through a University Ethics Review procedure, to ensure that the methodological approach taken was ethically sound and met the stringent criteria laid down to maintain high ethical standards.

The only element of human participation in the data collection procedure came in the form of interviews. The interviews related to professional matters only, thus minimising potential ethical concerns. Once potential interviewees had been identified they were sent copies of a project

information sheet (Appendix I) informing them of the aims of the project, the nature of their proposed involvement, details of their rights when participating, and information assuring confidentiality and the maintenance of their anonymity. Respondents agreeing to be interviewed were asked to reread the information sheet on the day of the interview. They were then asked to sign a written consent form (Appendix II) thus fulfilling University requirements and reflecting good practice as espoused by Gorman and Clayton (1997:47).

3.3 Identifying case studies

With each local/unitary authority established as constituting “a case”, it was decided that five case studies would be the ideal size of sample for a project of this size and scope. This represents more than fifty percent of the independent authorities in the East Midlands, thus providing a good overview of the regional situation, whilst leaving plenty of scope for initiating new case studies should a problem arise in one of the original five.

The case studies themselves were selected using the results of the DiadEM project¹¹, which identifies the locations of special collections across the East Midlands. Authorities were chosen mainly with the storage location of the collections (and therefore the facilities available) in mind. Those with collections centrally located in a designated special

¹¹ <http://www.liem.org.uk/results.asp?sortby=d&key=aem12024012151120041528>

collections/local studies library (or section of a library) were seen as the ideal candidates, as they would provide comparable facilities to visit in the unobtrusive observations phase of data collection. A second criterion was that the local authority's website must have a section allocated to special collections or local studies, without which comparable data from a website survey could not be collected. The size and nature of the collections based at these libraries were of less importance as the unique nature of local studies holdings in different areas are arguably their strongest selling point (Reid, 2003), and therefore such factors are unlikely to affect how vociferously they are promoted or what methods are employed.

Having identified the local/unitary authorities to be studied, potential interviewees were identified. The candidates were chosen based on their job description, or job remit. More specifically, they were all identified as being librarians in charge of, or responsible for special collections in their individual library services. This identification was achieved through freely available sources such as the local authority Web-pages, or through contact with a library's information services.

Once potential interviewees were identified they were recruited by way of an e-mail explaining the nature of the study and providing them with an electronic copy of the project information sheet.

3.4 Methods of investigation

This investigation was conducted using four methods of data collection, namely a literature review, a websites survey, unobtrusive observations and interviews, details of which can be found below.

3.4.1 Literature Review

Conducting a review of the literature is an essential part of an investigation such as this. Yin (1994) claims that experienced researchers use a literature review not to find the answers to a question, but to develop better questions about a topic. This is undoubtedly true, and the continuous examination of the literature in this field did help to identify different issues. However, this being an exploratory investigation aiming to offer suggestions on how to improve the marketing of special collections in public libraries, the literature view did also help to inform the researcher of potential ways of doing this. Therefore, in one sense the literature review helped formulate the questions *and* inform the “answers”.

The literature review was continued throughout the course of this project because new articles and initiatives are continually emerging, and

these needed to be taken into account in order to produce a fully informed study.

The search for relevant literature was conducted using a number of different abstract and full-text databases available through University subscriptions. The main services used were Library and Information Science Abstracts (LISA) and Library Literature and Information Science Full-text, both of which are dedicated to the field of library and information science. Additionally, searches of Web of Knowledge (WoK) and JSTOR were conducted. WoK search parameters were not restricted to the social sciences alone because this may have resulted in articles regarding the innovative use of new technologies or new techniques for promotion in non-social science fields being overlooked.

The Web search engine Google and the meta-search engine Dogpile were also used to locate relevant information. They were particularly useful for locating government policy documents and news articles. Finally, regular searches of the websites of the Chartered Institute of Library and Information Professionals (CILIP) and the American Library Association also proved useful for finding up-to-date articles pertaining to current library practice.

The keywords used to search the aforementioned resources were initially quite limited due to the use of predominantly British terminology familiar to the researcher. However, the vocabulary of key terms used developed over the course of the review, with US-based terminology such as “treasures” and “treasure room” helping to widen the search. Combining various special collections terms with marketing and promotion keywords helped to deliver more focused searching when required.

3.4.2 Websites survey

Having identified the increasing use of websites and Web-based initiatives for the promotion of special collections from the review of the literature (Liew, 2005; Reid, 2003; Traister, 2003) it was felt necessary to examine this area in the context public libraries. This was achieved by way of a websites survey – a systematic examination of the special collections/local studies section of the public library website in each case study using a set of predefined criteria as a checklist.

A number of similar surveys regarding the Web presence of special collections have been carried out in the past, although these have predominantly featured academic and research libraries. Love and Feather (1998) and Smith (2005) both developed useful sets of evaluation criteria. These have been used as a basic template for the current study, with the

main dimensions (namely online finding aids, digitised material, reference services, structural content, and user/collections information) remaining. However, specific factors relating to the public library context have been added under these sub-headings to reflect the focus of the study. Also, the survey criteria for this project include some newer applications such as the use of weblogs and discussion boards, which may not have been considered relevant in the past but which are increasingly being used as promotional tools. (A copy of the websites survey criteria is included in Appendix III)

3.4.3 Unobtrusive observation

Gauging the Web-based methods of promotion used by a library service is a task that can be undertaken remotely. However, to find out what *physical* methods of promotion are used by libraries the only true measure is to visit them and observe current practice first-hand. Therefore it was decided to incorporate a series of unobtrusive observations into this project.

Due to financial and time constraints only one library was examined per case study. The libraries chosen were either independent local studies libraries, or central libraries that contained large local studies collections, thus making a cross-case study examination of the data more directly comparable. Libraries were identified from a combination of their holdings

as listed by the DiadEm project, and information obtained from each authority's library website.

Unobtrusive observations have, in the past, mainly been used “to define product and performance quality” (Beards, 2006:39) and have thus involved an element of “testing” of services delivered by staff. However, as this part of the study only looks to gain an insight into the methods of promotion used by libraries, in libraries, no form of staff involvement was deemed necessary. This therefore negates a number of the behavioural and ethical concerns raised by Gorman and Clayton (1997:106) as potential disadvantages of observations as data collection methods.

A series of set criteria were again devised on the basis of the findings of the literature review (see Appendix IV). These were then organised into “forms” (one for each library) to allow results to be noted quickly and easily (Ashcroft, 2006; Purcell, 2005). The majority of questions posed required the answer “yes” or “no” to help aid the ease of evaluation (Purcell, 2005). The exceptions to this were where quantitative data was required, or where methods of promotion had to be individually documented.

Each library was observed once, and the data collection process was completed for all the case studies in the same calendar week.

3.4.4 Interviews

Interviewing library staff in charge of/responsible for special collections and/or local studies within each case study was deemed necessary to gain a clear view of the marketing practice pursued within that particular authority. It was also seen as an opportunity to explore librarians' perceptions of marketing and their attitudes towards the role of special collections in achieving the goals of "F4F" (DCMS, 2003).

There are two main types of interview: structured and unstructured. For the purpose of this investigation a structured interview approach was adopted, with the questions pre-determined. It was decided that formulating questions in advance would allow the researcher to unearth more useful information than if he were to take a more unstructured approach, as questions could then be tailored to suit the main aims and objectives of the study.

To a certain extent the "standardized open-ended interview" (Gorman and Clayton, 1997:126) format was followed, with the wording and order of the questions prepared in advance in the form of an interview schedule (see Appendix V). However, Oppenheim's (1992:87) "factual" approach to interviews was applied to the interview schedule when appropriate, thus allowing the researcher to reword questions when

necessary in order to explain any misunderstandings on the part of the interviewee. Furthermore, the researcher adopted the practice of pursuing relevant points in more detail where he felt more information was needed or an interesting point was developing. Although this occasionally meant deviating from the interview schedule briefly, the outcome often proved beneficial.

The interview schedule was designed to work logically through a number of issues emerging from the data collected earlier, by asking a progressive series of questions. The questions were split up into sub-categories¹² which not only acted to divide the interviews into sub-sections, but also aimed to help with the data analysis process by providing a certain degree of pre-coding. This was intended to make the breakdown and sorting of the final data more manageable.

The questions themselves were carefully worded, mainly using the “open” question format (Payne, 1951) to both avoid ambiguity of meaning and to encourage detailed responses. For questions that risked encouraging a brief answer (or a “yes” or “no” response) the researcher devised “probing” questions to encourage further explanation from the interviewee.

¹² namely: general perceptions of marketing; marketing policy of the local authority; knowledge of users, and access to collections; methods of promotion, and; national policy considerations)

Each interview was recorded using a Dictaphone (with the permission of the interviewees). This allowed the researcher to concentrate on conducting the interview without the need to take notes, and also aided the process of transcribing each interview

3.5 Data analysis

Data analysis is an essential step in the research process. Only by analysing the data attained through the various methods of data collection can a rounded view of the trends and variations in practice be presented.

There are three main parts to data analysis: data reduction, data display, and the drawing of conclusions (Miles and Huberman, 1984). In order to compare data within *and* across case studies the data reduction and data display elements were very important. The websites survey was completed using a table displaying the criteria across rows and the case studies in descending columns. Therefore the results were instantly reduced into a standardised form ready for comparison, and displayed in a way that direct comparisons could be drawn (see Appendix VI). The unobtrusive observations were conducted using an individual form for each case study. Each form listed the predetermined criteria, with space for additional comments by the researcher. These forms were later reduced to

a tabular presentation similar to that of the websites survey, and thus achieving the same type of easy comparability (see Appendix VII)

Analysing the transcriptions of the interviews proved the most challenging process. Large sections of text cannot be dealt with as easily as the data collected from the aforementioned processes. Oppenheim (1992) recognises the need to distil relevant information from the bulk of an interview transcript using “coding” as a method of classification. Strauss and Corbin (1990:61) refer to coding as “the process of breaking down, examining, comparing, conceptualizing and categorizing data”. As was mentioned above, the researcher employed an element of pre-coding by categorising questions under sub-headings, which reduced the extent of the task to a certain extent. The researcher then read through the transcripts, noting key themes that arose (as recommended by Finch, 1990) and subdividing the pre-coding into more focused areas. Key statements in the transcripts were then isolated as examples of these themes, ready for comparison with the results from the other methods of data collection. Only at this stage of analysis was the researcher able to draw together the information from all four parts of the investigation in order to reach Miles and Huberman’s (1984) third and final stage of analysis, the drawing of conclusions.

3.6 Limitations

For the most part the methods of data collection used in this study have delivered satisfactory results, and the multiple case study framework adopted has proved an excellent vehicle in terms of the examination of the methods of marketing and promotion used in library services within the East Midlands. The researcher encountered no difficulty regarding the execution of the websites survey or the unobtrusive observations, lending credence to the selection criteria employed when deciding which local/unitary authorities (and which libraries within these authorities) were to be used as subjects for the case studies. All the librarians identified as potential interviewees were happy to participate in the research, thus representing a 100 percent response rate. This negated the need to identify other suitable interview candidates or alter the initial choice of subject for a case study. However, certain minor limitations to the research have emerged over the course of the study.

The unobtrusive observations were designed to gauge the physical methods of promotion used by libraries. However, they were restricted to methods evident within the selected libraries themselves and therefore missed any promotional initiatives used in the wider community, thus failing to assess an area highlighted as a weakness by the National Audit Office

(2002) report. Such initiatives often came to light during the course of the interviews, but they lack physical verification by the researcher.

The incorporation of pre-coding in the design of the interview schedule proved to be only partially effective. To a certain extent the answers received were restricted to the broad categories in the initial outline. However, due to the close interlinking of certain concepts there was an element of crossover. This did not affect the quality of the data collected however. It merely meant that the initial categorisation couldn't be taken for granted and closer scrutiny of the transcripts was required in the post-interview coding stage.

The inclusion in the interview schedule of an opening section regarding the general perceptions of marketing were based on the theory that interviews should start off with general themes and gradually become more focused (Finch, 1990; Oppenheim, 1992). However, this introductory series of questions often led interviewees to pre-empt later questions regarding methods of promotion. Again this didn't pose problems in terms of the data collected. Although this is technically a flaw in the interview schedule it actually proved to be beneficial, as the later promotion-oriented questions forced interviewees to re-evaluate their initial responses and often resulted in more information being revealed.

3.7 Timetable

Due to the limited period of time available for conducting this research (approximately three months) a timetable was devised charting the ideal start and completion dates for the various phases of research (see Table 1 below). This was to ensure that the results of each method of data collection were completed with time to spare and that the researcher had a basic schedule to guide him. The timetable remained flexible so that any difficulties arising could be dealt with without causing major disruptions to other sections of the research. However, no such difficulties arose and the timetable was followed accurately.

Table 1: Dissertation progress timetable

Task	Month													
	May	June				July					August			
	28	5	12	19	26	3	10	17	24	31	7	14	21	28
Literature Review	Red	Red	Red	Red	Red	Red	Red							
Websites evaluation	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow							
Identify/contact interviewees	Green													
Identify case study libraries	Blue	Blue												
Undertake critical visits			Purple	Purple										
Analyse critical visit data					Orange	Orange								
Identify issues for interviews						Red	Red							
Undertake interviews								Dark Blue	Dark Blue					
Analyse interview data									Cyan	Cyan				
Write up dissertation											Green	Green	Green	Green
Submit dissertation														Yellow

4. Case Study A

4.1 Attitude towards marketing

Overall the attitude towards marketing and promotion seems to be a healthy one within this local studies library. Interviewee A's understanding of the general term marketing focused on two key elements, namely "selling" and raising awareness. The interviewee was particularly concerned with gaining exposure for the local studies department to raise its profile to a wider audience. The extensive research and local history collections held by this library service had, in the past, been overlooked in terms of its potential, and therefore had received little attention in terms of marketing and promotion. The council has taken a forward step in recent years by appointing interviewee A to take charge of local studies for the area, with the remit of increasing the library's visibility and awareness of its collections:

"... the main remit of my job when I started here a few years ago was to get this place out there [...] that was my job, to say what you can do with this collection to make it more acceptable to the public".

A key concern is the isolation of this local studies library from the main library service in the authority. This library is housed in a separate building, well away from the main public library. This problem could be negated by using focused marketing initiatives. However, more worrying is

the apparent isolation of the local studies library (and thus its special collections) from the central library's marketing policy and practice. Whilst acknowledging the existence of a general libraries marketing policy, including the appointment of a marketing officer to implement the policy, interviewee A noted that it had little effect on local studies and special collections:

“... her [the marketing officer] job is marketing the service as a whole, so when it comes to local studies and when it comes to the collections, that's not really been marketed [...] and that's where my job comes in”.

It was felt that, had the library been physically linked to the main public library or the local records office, special collections would have been included in a central marketing drive, thus providing a more integrated approach that could prove more effective in terms of results.

4.2 User groups

The librarians at library A appear to identify user groups mainly through observations of the material that users request, and the enquiries they make. Interviewee A stated that genealogy enthusiasts tended to be retired (presumably making use of the Census and Parish records), researchers usually focused on one specific collection in detail, whilst students from local colleges and universities ask for a broad range of materials, usually for

a general project they are researching. It was also mentioned that the introduction of People's Network computers had brought in some younger customers, but that they largely came to use the internet and showed little interest in the collections themselves.

There doesn't appear to have been any formal attempt to identify user groups or the percentage of the library's customers that those groups make up. Nor does there appear to have been any formal attempts to identify potential groups that may benefit from the services they offer, thus hampering the ability to devise a truly focused series of promotional initiatives.

However, interviewee A did note that it was necessary to dispel the image of the local studies library as an elitist institution:

"Lots of people feel intimidated coming in [...]. I think if people walk in here they feel alienated [...] it's quite intimidating, the whole setting, and we've done everything to try to alleviate that".

Addressing this problem (through the introduction of an open-plan layout and the introduction of beginners' courses in family and local history) has laid the foundations for encouraging new users in the future.

4.3 Physical methods of promotion (see also Appendix VII)

When conducting unobtrusive observations the researcher found a wide variety of informative promotional materials at the target library. A highly impressive array of resource guides are available in leaflet form for users to take away, including an introductory guide to the available collections. There are also useful lists of electronic resources directly relating to the collections, as well as promotional leaflets advertising a collaborative digitisation project conducted in association with other Local Authorities.

Card catalogues and handlists, whilst limiting use to the physical library, are logically arranged and well labelled for easy identification. All catalogues are situated in the public section of the library and therefore access was not hampered and collection visibility (within the library at least) is maximised.

Lists of local studies lectures and courses open to the public are also prominently displayed in the library. Interviewee A commented that these are a part of the drive to widen interest in the collections, and the results have been encouraging:

“... those things are going on to try and widen [access] more, and the courses have been a real success...”

Case study A is also very pro-active in outreach activities.

Interviewee A described a number of initiatives that library staff engage in, including writing articles for a local history supplement (each article highlighting a different local studies resource or collection that's available at the library) and participating in local events, using related library materials to demonstrate the library's relevance to different user groups. By inviting the local media to cover their attendance at such events they are also demonstrating an element of media savvy, using popular mediums such as newspapers and radio to raise their profile and reach an even wider audience.

The introduction of new induction sessions for school teachers also combines a good promotional exercise with elements of working towards national policy goals. By training teachers to make better use of their resources for teaching purposes they encourage use of collections from another profession, whilst fostering potential links with schools from which further outreach activities may develop. This last point can also be packaged as fulfilling "F4F's" criteria that libraries should be working with schools to "enrich and enhance the curriculum" (DCMS, 2003:8), thus showing politicians how special collections can actively benefit the community.

4.4 Web-based methods of promotion (see also Appendix VI)

Case study A's local studies website has a direct link from the central library service homepage, and is easily navigable through an expanded set of links on a sidebar.

None of the special collections materials have been catalogued electronically, but a series of excellent collection-level descriptions (usually accompanied by a low-grade digital image as an example of content) provide the reader with a general idea of the nature of their holdings. Certain collections are also represented by a basic handlist. Interviewee A notes the importance of a good website for the promotion of the library's holdings to a wider audience:

“...it's really important for places like here because we're [...] not computerised, we're all card catalogues [...] so the only electronic thing that [...] we've really got is the Web”.

The researcher was told that ideally all the collections would be electronically catalogued, but that it was not seen as a high priority by local councillors and so funding is never forthcoming. Despite this enthusiasm for cataloguing there are no direct links to the DiadEM or Cornucopia projects from the library website – a strange decision considering details of

their collections (and other similar ones around the country) are available from both.

Online exhibitions aren't available directly from the website, although links to a collaborative digitisation project are in evidence deeper in the site. Referring to further potential digitisation projects, Interviewee A expressed a desire to see much of the collection online, but feared it would not happen soon and so preferred to concentrate on electronic cataloguing first.

Reference services offered through the website are via e-mail and electronic enquiry form, but there is no use of more innovative technologies such as blogs and discussion boards. There are, however, useful links to other local and national institutions relating to their special collections and general genealogy.

5. Case Study B

5.1 Attitude towards marketing

Despite the lack of a written marketing policy for the library service as a whole, the local studies librarians take marketing very seriously. They recently conducted a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) of the library and its collections, followed by a frank assessment of promotional activities conducted in the past, their effectiveness, and potential future measures. This reflects interviewee B's assertion that marketing is now seen as more important than ever due to falling user numbers. The interviewee also focused on "publicity" and "promotion" as a main understanding of the term marketing, and this fits in with the makeup of the aforementioned SWOT analysis itself.

The variety of methods of promotion that have been or are being pursued in relation to local studies and special collections (see below) is also a reflection of librarians' confidence in the quality of the collections themselves. As interviewee B points out:

"We know that we've got something good that we want people to use".

Emphasis is placed not only on promoting the collections themselves, but on related services offered to users such as one-to-one help with family

history or outreach activities such as talks to local history groups. Case study B has recognised that such added value services are a good promotional tool in themselves, and current emphasis on such schemes should allow them to publicise their collections to a wider audience, both directly and by word of mouth.

The librarians have also noted the importance of opportunism in the marketing process. By attending local gardeners' markets and alike with publicity materials and related merchandise (e.g. monographs published in association with the library service) they are taking advantage of non-related events and turning them into a promotional opportunity, or as interviewee B describes it:

“...recognising [...] opportunities and jumping on the back of them”.

5.2 User groups

There has been a comparatively pro-active approach to identifying user groups within case study B libraries. Observations of the resources used by customers, the customers themselves, and the logging of all enquiries taking longer than five minutes offer an overview of the general makeup of a library's user base, as well as providing a rough idea of which resources are most used. Furthermore, staff have noted that a combination of library stock and library location affect the makeup of user groups. For example,

one library in the authority mainly attracts genealogists due to the access to census material *and* the close proximity of the local records office, where Parish records are held. Another draws more researchers and local historians due to its subject-specific collections and the ease with which the library can be reached. Analysis by observation (as practiced here) appears to be a fairly standard practice in this field of librarianship.

Additionally, general user surveys were carried out in the mid to late 1990s, and further surveys regarding the use of specific resources were carried out in 2002 and 2004 to gain a better idea of user groups. Comparisons of results have revealed more than just who uses the library. For example, whilst the number of family historians using one library has remained steady, the services they require have altered over a decade. Interviewee B has seen the changes take place:

“We [now] get a lot of beginners who want their hands holding whilst they start, and we get people who [say] “I’ve done all this on the internet and now I’m stuck. Can you help me now?””

What has been identified through examining user groups systematically is a change in user behaviour and needs, rather than just “who” uses the facilities. As interviewee B points out:

“...it’s become more of a problem solving and user training process than a direct information provision service”.

This recognition has therefore allowed staff to adapt better to user needs, as well as providing a better idea of who be the target of promotional activities and how.

Interviewee B also advocates a healthy balance between needing to attract new users and maintaining services for existing customers. Whilst new users are a priority, satisfied clients can be a beneficial PR tool in their own right:

“If you look after them there will be a lot of good publicity out of it”.

5.3 Physical methods of promotion (see also Appendix VII)

Leaflets are a major promotional tool adopted by case study B. The researcher found a large number of concise and useful guides to collections and resources in leaflet form during unobtrusive observations. The majority are in-house publications rather than professionally produced products, and the reasons for this appear to be related not only to cost but also tedious local council protocol, as summed up by interviewee B:

“...the disadvantage from my point of view is that the process of getting anything printed is tedious because we’ve got to get three quotes, we’ve got to jump through all the hoops”.

Similar frustration was expressed regarding press releases, where local council press officers have to process requests and usually produce generic-sounding statements that receive little media attention. Interviewee B preferred to go directly to journalists rather than issue press releases, thus bypassing the system and generating more interest.

Other forms of publication have been used as promotional tools. The local studies department writes a free quarterly newsletter focusing on available resources and local history matters. This is available in hard copy or electronically from the library website. The library service also publishes occasional monographs by local historians, using interest from the local media to raise awareness of both the book, and the library as a research facility.

Outreach activities are a prominent method of promotion in this library service. Giving/arranging talks for local history groups, and attending special events put on by the local authority or other local bodies demonstrates a commitment to increasing library visibility in the local community. If this does not eventually translate into physical visits to the

library, any increased interest may instead manifest itself in greater use of the website.

In terms of physical finding aids, the library visited by the researcher maintained card catalogues and handlists of special collections, which were easily located and easily navigable for users.

5.4 Web-based methods of promotion (see also Appendix VI)

The library service web-pages are directly linked from the local authority pages, and special collections web-pages are easily located and quite easy to navigate.

As with case study A, special collections are not electronically catalogued, thus hindering potential access and reducing awareness and again, no links to DiadEm or Cornucopia are available. Collection-level descriptions of holdings are available online, although they are quite brief and aren't an adequate substitute for full cataloguing. Some handlists of resources are also available but these too contain minimal information.

Digital images of collections on the website are scarce and of low quality. No online exhibitions are directly available on the website, though

there are links to a collaborative digitisation project at a separate website, and this is an impressive resource.

Interviewee B displayed mixed feelings about digitisation projects. Whilst the benefits of wider access to materials through virtual use would benefit website user figures it was feared that this would have an adverse effect on the physical use of the library. Also, the reliability of partners for collaborative projects was a genuine concern raised. In the aforementioned project one partner had pulled out of the process thus leaving the remainder to pay an increased cost for the website's maintenance. Whilst not opposed to the idea of further collection digitisation, interviewee B suggested that increasing access to collections by electronically cataloguing them would be the main priority, although the costs of such a project will probably prove stumbling block.

Finally, reference services offered through the website are via e-mail only, with no electronic forms or other modes of help such as FAQ pages for local studies users, and no projected timeframe for responses.

6. Case Study C

6.1 Attitude towards marketing

Interviewee C displayed a well balanced understanding of marketing, recognising that identifying current and potential user groups to target is just as important as actively promoting and publicising collections. Recognition of the dangers of promoting collections only to current library users because it's easier to reach them was also displayed. Interviewee C described the marketing of special collections and local studies as "vital" due to an increase in competition from other heritage industries and a desire bring in new users who would benefit most from using the collections themselves:

“...there's loads of people out there who could use it [the local studies library] and get jot from it, that don't actually know it exists”.

This positive attitude to marketing is echoed throughout the local studies staff. However, the actions of the local authority and the local library service do not appear to support the overwhelming enthusiasm of the frontline staff. The library service has an overall marketing policy, but it is controlled through a central communications team who regulate press releases and other activities. They tend to focus on general services such as DVD/video rentals rather than specific departments like local studies.

Interviewee C reflected, with some frustration, on past and present marketing practice for local studies:

“...we didn’t do any marketing and we don’t really have any marketing strategy. The big problem is that we don’t have any marketing officers [... and] the budget’s held centrally, so we don’t have a marketing budget per say anymore”.

Interviewee C revealed that local studies librarians within the county had formed their own working group to identify county-wide aims for the service and developed a basic marketing strategy that was fit for purpose. However, despite their best efforts the strategies devised rarely reach fruition due to the lack of a marketing officer with a dedicated budget who could implement such initiatives on their behalf.

6.2 User Groups

Current user groups are identified largely through the collections they use and the enquiries they make. Regular counts of users and logging of the materials they searched for over a three year period gave a general impression of the makeup of users and the resources they use, with roughly 70 percent using family history materials and approximately 30 percent dealing with local history. Furthermore, it was noted that the use of collections relating specifically to characters from local history largely

attracted academics and researchers, with more general materials thus attracting amateur enthusiasts more.

General user surveys have been conducted to gauge the use of/demand for certain materials, thus allowing the library's extensive special collections and local studies-related materials to be rotated from closed book repositories to on-site storage as consumer demands change. However, no specific marketing survey has been carried out amongst current users or the general public to gauge current awareness of the collections.

Despite a lack of research into identifying potential user groups Interviewee C has been very pro-active in engaging potential audiences through personal involvement in community-based projects. A firm focus on engaging ethnic minorities in local studies-led activities has led to the development of one highly successful community history project and ambitions to follow similar avenues with other community groups. Targeting specific community groups in the absence of any firm knowledge of non-users is an excellent idea. The importance of community targeting and the power of local studies/special collections units to successfully engage new audiences are clear to interviewee C:

“...it’s vital that we get community groups and a whole range of people who don’t use us. [...] That’s why I think family history’s so good because it draws people in who wouldn’t think of using a library”.

6.3 Physical methods of promotion (see also Appendix VII)

As with other case studies, leaflets are a popular method of promotion here. However, the majority of leaflets located by the researcher during unobtrusive observations were professionally printed, usually regarding specific projects or collections. No general guides to research resources or family/local history resources were in evidence. Interviewee C presented the researcher with a number of monographs and leaflets during the interview. The publications (published in association with the local library service) provide valuable background knowledge on a number of collections and their subjects. However, a number of these were not on general display or not noticeably advertised during the researcher’s observation period. More should be done to make these excellent resources more visible to users.

The local studies librarians are very pro-active in terms of outreach activities. In addition to the aforementioned community-based projects, they also participate in community history events in association with the local university and family history conferences.

Giving talks to local history groups is an effective method used to actively promote collections. Here this practice is taken much further by offering after-hours research visits behind the scenes of the local studies library itself, thus encouraging group members to make return visits in future and building useful contacts within those groups.

Recognising a resurgence in genealogical studies in the late 1990s and listening to user needs (by providing family history courses and investing in the relevant research materials) led to a massive increase in visitors, with a massive 400 percent increase between 1998 and 2000. Furthermore, by developing contacts within the local media the local studies team has gained valuable publicity for their family history activities and for special family history events in particular, thus widening knowledge of collections further.

One innovative method of promotion adopted in this library is what interviewee C described as “a multi-screen”. A computer displays a changing set of images of the local history collections and details of local history courses available at the library. These screens are situated throughout the library, thus advertising collections and services beyond the local studies department. Additionally, by way of an agreement with the borough council, they are also visible at council-run leisure facilities, thus increasing the reach of this particular campaign.

6.4 Web-based methods of promotion (see also Appendix VI)

From the local authority front page there is no direct link to the library homepage and this is an immediate issue relating to the Web-visibility of the library services, as first-time visitors to the council's site would be given no immediate guidance on where to look. The webpages themselves are located in a subsection of the site that would probably require a search of the site to locate them. Once the library pages have been located however, the local studies section is easily found.

A number of finding aids are available from this site. Collection level descriptions of the special collections are in evidence, as well as details of published collection guides and their costs.

Although special collections aren't catalogued directly on the library's main electronic catalogue, a separate catalogue is accessible from the catalogue front page and the majority of the special collection materials are electronically catalogued there. This is obviously good for improving access and visibility of collections. The electronic cataloguing of special collections is aspired to by all the case study libraries, but as interviewee C explained, it was achieved here by way of a collaborative online initiative. Several local authorities were grouped together by government and expected to bid for funding for projects. Once funding was approved the

authorities had to work together on projects. However, each authority wanted to achieve a different goal. Case study C used the funding for cataloguing purposes, but the disadvantages of this collaborative system soon became clear:

“What we ended up paying for, of course, is a project manager that we probably wouldn’t need, to oversee three projects, whereas we would have probably managed it ourselves [... and] we’re paying for a system that does more than we want...”

It appears that this may have been the only way to instigate an online cataloguing project, but it seems to have cost more than necessary due to the way it had to be brought about.

Although no online exhibitions are currently available it appears that this will be rectified soon. As Interviewee C explained, the local studies section of the library website is in the process of development and the next stage is to mount a series of digitised photographs online.

Once again, online reference services are limited to e-mails and electronic forms, with no other methods of electronic contact being adopted.

7. Case Study D

7.1 Attitude towards marketing

Special collections and local studies appear to be considered a very low priority in the library service as a whole. This is reflected in the actions taken by the local council regarding the collections themselves and the lack of emphasis placed on marketing them.

Interviewee D explained that the majority of the special collections previously held by the authority had been transferred to a central location in an archive outside the authority itself. Alarming, the one major collection that remains was split in two, with all local references moving with the other collections. This raises issues regarding access to collections in particular. Splitting a significant collection which has been cited in subject specific literature risks confusing scholars and potential users of that collection by blurring its status and creating an ambiguity of location at item-level. This in turn can negate a collection's potential as a resource and reduce its potency as a research tool by discouraging rather than encouraging its use.

Perhaps more worrying still is the attitude that interviewee D has obviously noticed in council and library officials regarding the remainder of this collection:

“I think at the moment there is a feeling in the authority that we shouldn’t be having the collection anyway. [...] the collection, as a whole, is considered very, very, very low priority by my authority”.

Interviewee D also revealed that, in terms of marketing there is a policy for the authority as a whole but:

“The library service I would say is only just fully engaging with that process [...] by appointment of a dedicated marketing officer...”

Sadly this new marketing push does not cover special collections or local studies material at all. Interviewee D emphasised the need to market services in the current consumer-driven climate but warned of a possible “undercurrent of staff” still resistant to the concept of marketing in relation to library services. It also seems highly unlikely that any marketing activities regarding special collections will be viable in the foreseeable future due to the apparent hostility of council officials.

7.2 User groups

There are currently no mechanisms in place for identifying the nature of current special collections and local studies users. Nor are there any attempts to identify possible future users, despite Interviewee D’s assertion that attracting new users must take priority over concentrating on services

for existing customers. Certain presumptions have been made regarding the users of the remaining special collections – mainly that interest in them is largely from academics or those with a specialist interest in the subjects they cover. However, there appears to be no firm evidence for this.

Some attempts were made to engage new audiences, in particular ethnic minorities, mainly through participation in a BBC Web-archiving project:

“...we had some additional funding from the East Midlands to [...] particularly target the Asian communities because they felt they were under-represented on the [...] website”

However, this is the only active method of new user engagement that the researcher is aware of in this case study.

7.3 Physical methods of promotion (see also Appendix VII)

All of the promotional material encountered by the researcher during unobtrusive observations related to the library’s local studies and family history collections only. No individual references to any of the remaining special collections were found, nor were there any visible card catalogues or handlists related to these collections.

A small number of home-produced leaflet guides to family and local history resources were available, as was a list of useful resources available for free on the internet. There is also a local history newsletter published regularly by the library service, which acts both as an outlet for local history research and as a method of promotion, with advertisements for forthcoming local history talks, new local studies books, and occasional mentions of the special collections themselves.

Interviewee D noted that the emphasis placed on the local studies collection was because it's a "forward-looking" collection with a greater appeal than the other special collections. This emphasis is further demonstrated through the provision of IT-based family history courses and occasional talks arranged on behalf of local history groups. However, such pro-active promotional activities are limited in number due to financial restrictions.

The most pro-active measure taken to increasing the visibility of the local studies collection has been transferring the open-shelf collections (predominantly modern) from the first floor to the ground floor of the main library where the collections are housed. The library in question has no elevator but does have disabled access on the ground floor. Therefore moving such collections within reach of all potential users is a forward thinking step, and by locating them near the People's Network computers

they have considerably increased the potential number of clients who will be exposed to them.

7.4 Web-based methods of promotion (see also Appendix VI)

An initial evaluation of the local authority website showed that there was no direct link to the library's web-pages from the main homepage. However, subsequent re-evaluations revealed that a link had been added, thus making access to the library's site more direct and more intuitive. However, local studies and special collections do not have their own dedicated webpage. Information regarding these collections is instead contained within the "information and reference" section. Details of the local/family history sources available at the library are listed here, along with direct links to other family history websites. The descriptions of these particular collections are comparatively detailed, and this is consistent with the focus on local studies mentioned above. However, there is only a very brief collection-level description for the most extensive special collection remaining, and no mention at all of other special collections that DiadEM lists as being held within the authority.

Unsurprisingly, the local studies/family history collection has been electronically catalogued due to their "forward-looking" nature. However, perhaps more surprisingly, the main remaining special collection has also

been added to the main library catalogue, although the records only contain a minimum level of detail. This was described by interviewee D as being “one pro-active step” regarding promoting this collection. Whilst this cataloguing, and the placing of collection-level details on Cornucopia through the DiadEM project were seen as a way of making the collection more visible to people searching for subject-specific resources, interviewee D also hinted that it was also a move towards making sure the collection wasn’t moved away to another location as happened with other collections.

The website for case study D contains neither online exhibitions nor any digitised materials and, apart from the contributions made to the BBC project mentioned above, there is no evidence to show any participation in online digitisation projects or other online collaborative ventures.

As with case studies A and C, the website limits the offer of online reference services to e-mail and electronic forms. However, unlike the previous two examples there is no suggested timeframe offered for the answering of an enquiry.

8. Case Study E

8.1 Attitude towards marketing

Currently there is no marketing policy for any part of the library service in this case study. Due to an initial organisational restructuring which was then interrupted by an organisational review within the local council as a whole, the role of the library service is still being established. Naturally, no marketing strategy can be devised or implemented within an organisation that is still developing a new remit. Interviewee E expressed a desire to develop a marketing policy for all library services, including special collections/local studies, in the near future. Declining book issues and a static perception of library services amongst the general public were cited as key reasons for the need to develop such a policy.

Interviewee E did demonstrated a good understanding of some key elements of marketing in a service-driven environment, such as the need for promotion of resources and raising awareness of services relevant to both current and potential users. A distinction was also drawn between selling and marketing products and services, echoing Levitt's (1960) sentiments. This bodes well for the development of a future marketing policy that is appropriate for the library service that eventually develops from the organisational review.

8.2 User groups

The special collections held by case study E vary dramatically. They have one very large collection of international importance and a series of much smaller collections, largely of local interest. Access to these collections is strictly regulated and appointments must be made by visitors in advance before they are allowed access to materials directly. Although these stringent measures do restrict access to materials, they also allow the library to formulate a more accurate picture of the users of specific collections by logging both the nature of an enquiry and details of the user. This is particularly the case for the largest collection where access is controlled by a research officer who manages the use of that particular resource. These strict controls on access give a negative impression, but are often unavoidable due to security and staffing concerns. By logging details of enquiries and enquirers this library service will, however, have developed a set of data which can be used to give usage figures for individual collections and clearly identify the makeup of current user groups, thus transforming a negative factor into a positive profiling exercise.

This library service has a positive attitude towards attracting new users. Interviewee E described the mission of the new head of libraries as being:

“...to extend to people who don't use us already, [...] that could use us but just don't know we're there”

with the general aim of attracting the:

“40 percent [...] of the population who don't use us at all, never have done, [and have] never shown any interest”.

Interviewee E also explained that the aforementioned organisational restructuring has been designed specifically to help target non-users through pro-active measures:

“we were realising that we'd got to do [restructure] the library service because [...] we needed to free up more time for, for front-line [and] outreach activities”.

In terms of special collections such outreach activities are already underway, particularly in relation with the collection of international importance. The affiliated research officer has developed links with the local university, provided a presence at the local literature festival, and given tours of the collections to local school children. Such activities are good for increasing the visibility of collections in the community and raising awareness through subsequent publicity. They can also stir interest amongst groups who may not have realised the extent of the library's collections and services, and encourage new users.

The positive attitude to attracting non-users in this library service indicates a forward-thinking attitude. Special collections appear to be leading the way in terms of outreach activities, and the researcher would encourage further work in this area, backed up by further physical and Web-based promotional initiatives as part of an integrated, service-wide marketing strategy.

8.3 Physical methods of promotion (see also Appendix VII)

Apart from the elements of outreach work mentioned above, few physical promotional initiatives have been tried in relation to special collections. During unobtrusive observations the researcher found a few desk-top published leaflets highlighting physical and Web-based family/local history resources available at the library, as well as a professionally published bookmark advertising an online index relating to local studies materials (see below). A leaflet briefly explaining the extent of the main special collection was also found. However, it gives scant information for such an important resource. This significant collection is kept in the library chosen for observation by the researcher, yet this leaflet was the only clue found to its presence there. Although conceivable that a low profile is maintained due to security and staffing considerations it seems a short-sighted decision not to exploit what may well be the library's greatest attraction to its full potential.

An advertisement for a family history workshop covering Web-based resources was in evidence, but only one date was set, leaving the impression that this was to be a one-off event and not a regular initiative.

The researcher did find hand-lists and card catalogues for the smaller special collections available for browsing in the main reference area of the library, and this is one positive step in promoting access to these collections at library level.

Interviewee E acknowledged that the current physical promotional activities for special collections are negligible, and that those that are being employed have remained the same for many years. Therefore, gauging the effect of these methods is virtually impossible, although interviewee E suspected that they have little or no effect on usage.

8.4 Web-based methods of promotion (see also Appendix VI)

Navigation of this local authority's web-pages is not straightforward, and locating the library homepage is difficult due to the lack of a direct link from the council homepage. Nor is there a direct link to local/family history and special collections pages from the library homepage. Instead, they are located in the A-Z of services subsection. The separate page for the largest of the special collections is understandable due to its international

significance as a resource, and the collection level descriptions give an adequate guide to its physical makeup. However, details of the other collections are minimal at best, and are difficult to locate on the website (eventually they were found under family and/or local history).

Interviewee accepted that the library web-pages were going to be a very important promotional tool in the future but acknowledged that the current content is very limited:

“At the moment we haven't really got anything very much [online]. [...] we've said we've got these, these wonderful collections [...] but it doesn't say anything about the content of them [...] or what people can access or not access”.

Once again, electronic cataloguing of the collections is seen as vital to improving the visibility of special collections. Interviewee E notes that a start has been made on the largest collection, but it is not yet available online. Plans to continue the cataloguing process include the employment of volunteers, though this seems unrealistic given the detailed and specialist nature of the special collections cataloguing processes (Attar, 2003). More promising is a plan to work with the local university to bid for an externally funded cataloguing project. Both parties can benefit from this process - the library gets a collection catalogued and the university gains a serious research project and potentially more funding in the future as a result.

In terms of digitised materials, there are a number of low-quality images from the collections on the library website itself. Furthermore, there are links to a collaborative online digitisation project containing images of some of the special collections, as well as local collections from other sources. Interviewee E notes that newspapers were a particular focus for this project, as digitisation has the dual effect of preserving the original materials by restricting use, whilst upgrading on the original surrogates – namely microfilms, which are often of low quality.

There are also links to a searchable index of local resources (ranging from newspapers to pamphlets) provided on the local authority website, and this is a very useful finding aid in terms of local history in general. It does not, however, cover the more specific special collections.

9. Trends, Conclusions and Recommendations

This chapter will consider the main trends emerging from this study with regard to the marketing of and access to public library-based special collections, and their perceived/potential roles in relation to national library policies.

9.1 Trends

9.1.1 Special collections and national policy

All the librarians interviewed for this study acknowledged that special collections have a role to play in the implementation of national policy, and “F4F” (DCMS, 2003) in particular. However, levels and types of activity within the case studies vary dramatically. For example, by encouraging teachers to use special collections for teaching purposes, case study A is engaging with the policy’s desire to see libraries support schools in delivering learning to pupils, and doing this in an innovative way. Meanwhile, case study C is encouraging the social inclusion of ethnic minority groups by engaging them in Heritage Lottery Funded community history projects. Case study D, however, only appears to engage in minimal levels of such activity at this time, and no future plans were revealed to the researcher.

By developing programmes of activities compatible with national policies librarians have the opportunity to exploit their special collections to the full, creating a value-added service and confirming their collections' status as assets, not a drain on resources. Such programmes can also act as vital tools for marketing the collections internally to policy makers and library managers. Proving that special collections can help to achieve goals set by national government could also help librarians argue for current levels of funding to be maintained or even increased, thus allowing scope for further development of the profile of the collections through the instigation of more pro-active initiatives. What is clear is that in the current political climate such steps are vital to justify continued expenditure.

9.1.2 User profiling

Knowing the current users of special collections allows the development of more focused promotional initiatives, as well as helping to identify non-user groups who could then be targeted in the future. Most of the libraries in this study have devised methods for identifying types of users through observations of the materials used, types of enquiry submitted etc. However, the responses given to the researcher suggest that not enough emphasis has been placed on user profiling in the past.

For example, case study B was the only library that conducted user surveys specifically for local studies/special collections departments. Interviewee B expressed concern that users become saturated by over-frequent use of surveys, and thus unreceptive to such schemes. This is a valid point that must be considered. However, the fact remains that the best way to ascertain general information about users is to ask them, rather than making deductions. Someone using a predominantly research-based collection, for example, may not necessarily work in academia. They could easily be pursuing a personal interest, but this would not be evident from observations alone.

Surveys can be effective when conducted infrequently but at regular intervals, e.g. bi-annually. The data collected can give a snapshot of usage for a certain timeframe, and can be particularly useful for examining user trends once several years of surveys have been completed.

Lack of data regarding current users need not necessarily prevent the identification of potential user groups though. Despite a lack of market research, case study C has identified a number of ethnic minority groups that it wishes to encourage to use local studies/special collections materials. By developing contacts amongst these communities and starting community-driven projects the librarians have effectively taken the collections out of the library to the wider public and have succeeded in

developing new markets. The use of blanket-profiling, or identification of potential users by broad category, is evidently successful and should be encouraged where possible.

9.1.3 External promotion

With the exception of some outreach work, little physical promotion outside the library setting was mentioned by any of the interviewees. Nor was there much evidence of it during unobtrusive observations, although the limitations of this measure have already been noted. Whilst outreach work is an exceptional way of promoting special collections, it must be remembered that there are physical limitations to the number of events that librarians can attend. Such methods must be supplemented with other traditional or non-traditional physical promotional initiatives in order to maximise the potential effects.

Case study C has adopted a multimedia approach to promotion of its special collections. They rotate digital images of the collections and details of courses run by the local studies department on computer screens around the library to advertise their existence. This initiative was recently extended through negotiations with the borough council so that these screens could also be located at council-run facilities such as gyms, thus increasing visibility to a wider audience.

Less elaborate but more practical is the use of leaflet drops as exemplified by case study B. They paid a company a nominal fee to distribute large numbers of leaflets at non-council owned concerns such as hotels, pubs and supermarkets. This has increased visibility tremendously, and vastly increases the chances of non-users coming into contact with information regarding the collections. This method would be ideal for all the case studies to adopt. All showed evidence of using leaflets as promotional materials in their libraries. The low costs of desktop publishing and employing a distribution company would suggest that such a scheme would provide extensive publicity at an affordable rate. Similarly, the use of posters to promote special events would be another inexpensive method of gaining publicity, as advocated by Steele (1995).

9.1.4 Exhibitions

Once again this is an area that hasn't been exploited fully in any of the case study libraries. Although some of the libraries examined during unobtrusive observations occasionally displayed pieces from the collections, nowhere was there any substantial selection of materials representative of a library's special collections holdings, or any structured display that would warrant the description of an "exhibition" in the eyes of Prendergast (2003) or Gifford (2002).

It is arguable that the libraries in question lack the space to house a large exhibition, and in some of the local studies libraries isolated from other public library facilities (e.g. case study A) this is certainly the case. However, this is not so in all the case studies. The creation of an exhibition could be justified as an educational activity and a method of increasing access to what are often restricted-access collections. The high-visibility nature of exhibitions within a library also makes them a great promotional tool, although admittedly this is restricted to people who physically visit the library.

Interviewee C mentioned using mobile exhibitions for use in external special events and outreach work, although due to practicalities they are restricted to the materials that can be used for such occasions. Nevertheless, this is very good method of adding to the promotional value of outreach activities, as showing original resources to an audience is preferable to describing them, and the visual impact of this is likely to be greater (and longer lasting) than a lecture on its own.

9.1.5 Electronic cataloguing

One of the most notable trends discovered during the course of this research was the importance placed on having special collections electronically catalogued, and this is consistent with the views of Attar (2003)

and Bengston (2001). The desire for retro-conversion projects amongst the interviewees unanimously outweighed the desire to participate in digitisation projects, largely due to the increased visibility and access to the collections that cataloguing would provide. However, only case studies C and D have managed to achieve this and make the data available to the public. The lack of funding for such projects would appear to be related to the perceptions of cataloguing itself amongst policy makers. Whilst all the librarians interviewed are staunch supporters of such projects, interviewee A noted that it wasn't seen as a main priority by the council, whilst interviewee E insisted "we haven't got any money to pay anybody [to catalogue the collections]". In this case the library is considering using unskilled volunteers to catalogue an internationally important collection. This is a desperate measure to provide at least some form of searchable item-level access to a potentially international market, and it demonstrates the importance of electronic cataloguing for special collections. However, calls for funding are, more often than not, to no avail. Interviewee B describes some peoples' perceptions of cataloguing as "dead boring", and perhaps its importance is lost on those policy makers without a library background. It is therefore up to librarians to promote the value of such projects to politicians in terms of improving access and increasing user figures. The best way to gain support for retro-conversion projects would appear to be by showing how they can help to meet local and national political goals and targets.

9.1.6 General use of library websites

As public library websites are generally part of an overall local council website they are usually a small subsection of a much larger site structure, and their location within this structure is often unintuitive to the average user. Therefore, a direct link to the library homepage from the main council homepage would be advisable. However, neither case studies C or E had such a link from their local council homepage, thus making easy navigation more difficult than it need be. Furthermore, local studies/special collections pages on the case study E website has no link from the library homepage, and case study D has no pages dedicated to these subjects at all, preferring to locate them under “information and reference”. In order for a website to achieve its full promotional potential visitors must be able to locate the information they want quickly and easily. Therefore it is essential that library services pay more attention to the navigability/interlinking of their web-pages and the visibility of the library site from general council website.

Interviewee A described their Web-presence as “really important” because without electronic cataloguing it provides their only online presence. Good use of websites can, to a certain extent, compensate for a lack of electronic cataloguing. By providing detailed collection-level descriptions websites can prove vital in raising awareness of the existence of collections – perhaps even more so than electronic catalogues. Although

online catalogues can provide detailed, item-level descriptions, they aren't searchable through Web-search engines due to the nature of their construction. The data that they hold make up part of the "invisible" or "deep" Web and are only accessible by submitting specific queries directly to them. Collection-level descriptions written on a website however, are (generally) searchable by search engines. Therefore excellent collection-level descriptions may provide *better* initial access to a collection than an electronic catalogue alone. Case study A has developed very full collection-level descriptions to compensate for their lack of online catalogues. Case study D however, has much to say about local studies/family history but little regarding its other remaining special collections. Although one of their collections has been catalogued, it will attract no extra use if potential users remain unaware of its existence. Better collection-level descriptions are required to facilitate better access.

None of the case study websites maximise the potential for communication and reference services. As Appendix VI shows, none of the sites offers more than e-mail enquiries and/or electronic enquiry forms. A frequently asked questions (FAQ) page could offer answers to a number of generic questions regarding local/family history, thus allowing librarians to concentrate on more specialist enquiries. Better still would be the use of a weblog which could fulfil a dual purpose. A blog could act as a rolling FAQ page, fully searchable and constantly being updated. At the same time it

could be used to advertise talks, courses, exhibitions and activities – a free method of online promotion. Furthermore, blogs may attract a completely new user group, particularly if linked to blogging networks through one or more of the many providers. Although this would require regular updating by librarians, the benefits of new technologies such as these should not be overlooked.

Similarly, using discussion boards would be an excellent way of developing communications between researchers, amateur special collections enthusiast, librarians and the general public. By providing an open forum for debate librarians could help to develop communities of practice relating to specific areas of local/collection-based interest, which in turn could advance research in these areas whilst raising the profile of the library and its collections.

9.2 Conclusions

The results of this study would indicate that current practice local studies/special collections departments in public libraries are, on the whole, promoted well within the confines of the library service at a physical level. Leafleting is used to advertise resources and services in all but one of the case studies, and interviews revealed that all the case studies run introductory courses to local/family history to draw in more library patrons.

However, the collections themselves are underused as promotional tools. They should be afforded greater visibility within libraries to directly engage customers, instil a sense of ownership, and dispel the sense of a barrier between the public and special collections that Traister (2003) notices all too often.

All of the case studies conduct outreach activities, and this is a valuable method of gaining exposure for collections and the departments away from the library. However, little focus is placed on other external methods of promotion. More must be done to reach as many non-users as possible by the use of physical method of promotion.

Whilst strong in traditional methods of promotion, local studies departments have been slow to develop the use of their websites as promotional tools, and those examined during this study still fall well short of fulfilling their potential. Generally speaking, the websites are currently used as sources of basic information regarding collections, rather than showcases to display their virtues. They are currently what Reid (2003) would describe as “informational” websites. More detailed collection-level descriptions are required to improve the websites as finding aids, and the adoption of communication technologies such as discussion boards could transform sites from online notice boards to multifunctional tools for information dissemination and interactive learning.

Local studies and special collections have the potential to fulfil a number of key national policy aims. One example is encouraging the study of genealogy, which can induce self-motivated learning and instil the aesthetic of lifelong learning in practitioners. All of the case studies are involved in elements of outreach work that could cover one or more national policy objectives (e.g. lifelong learning, social inclusion, supporting school curricula, etc.) but more needs to be done. The potential virtues of such activities must be rigorously extolled to library managers, users and potential project partners to ensure that the current good work is built upon and not abandoned as one-off initiatives.

The most striking thing to arise from the interview process was that those with responsibilities for special collections are continually devising new and innovative ideas to market the collections to new audiences. The majority of interviewees were found to have a very pro-active approach to marketing. However, a lack of support from council/library officials, or a lack of communication between library and non-library departments often leads to the non-implementation of good ideas. Interviewee C in particular noted that, due to the lack of a marketing officer with special collections responsibilities, ideas from the front-line are rarely acted upon.

Librarians working closely with special collections and their users are best placed to give advice on the best ways to market collections and

encourage new users. It seems extraordinary that ideas developed from the perspective of practitioners remain invariably unused. A lack of communication between the various parties may be the underlying cause of this, as marketing officers with a special-collections remit seem scarce. The researcher would encourage those with responsibility for marketing budgets to consult closely with frontline staff and consider their proposals seriously before dismissing them, as they will probably be the most informed suggestions available.

Methodological similarities between marketing practices have emerged between case studies, and this is not considered a problem. In fact, many of the methods employed are supported by the literature examined as part of this investigation. However, the greatest concern is the wide variation in levels of marketing in the five case studies. Case studies A, B and C are highly pro-active in their approach to marketing collections and encouraging new users. A combination of outreach activities and in-house initiatives have led to evidence (some anecdotal, some quantitative) of an increase in user figures. Case studies D and E however, currently only participate in minimal levels of activity to promote collections and engage new users, and interviewees D and E admit that the effects are probably inconsequential. Whilst the “love libraries” campaign is providing a joined-up approach to general marketing across public libraries in England,

its effects don't appear to stretch to local studies and special collections departments.

If the differences in levels of marketing activity within one county are so great, the variation across the UK must be vast, and this has serious implications for the visibility of and access to public library-based special collections. There needs to be a joined-up approach to the marketing of special collections nationwide, including a concerted effort by all involved to maximise their potential by increasing their usage and widening the social diversity of user groups. The first steps towards such an approach must be taken at county level. The development of county-wide guidelines for the potential uses of special collections, and for potential marketing strategies would be an ideal start to delivering a national framework for maximising access to and use of some of the UK's most valuable, but least recognised resources.

9.3 Recommendations

The following recommendations address issues that arose from the investigations that were conducted during the course of this research, and should be considered seriously by both librarians and library managers. The recommendations are categorised as “general”, “users”, “physical promotion” or “Web-based promotion” depending on which aspects of

marketing they cover. The majority of suggestions can be implemented with minimum levels of financial investment – time and effort are the main requirements.

9.3.1 General

- Introduce a marketing officer whose remit specifically covers local studies/special collections. Their role will be to liaise between librarians, library managers and council publicity officers to convert ideas into practice.
- Conduct a SWOT analysis of collections with the aim of identifying how best they can be exploited to fulfil national policy aims and which of these aims they are most compatible with.
- Market special collections *within* the library service, focusing particularly on their key strengths in relation to the implementation of both national and local library policies.

9.3.2 Users

- Conduct bi-annual user surveys with the primary objective of establishing the following: which collections are being used; reasons behind that use (e.g. academic research, personal development etc); and the user's place in the national demographic (if possible).

- Establish contacts with local ethnic minority groups to encourage future engagement with local history/special collections-led initiatives.

9.3.3 Physical promotion

- Expand current physical methods of promotion (e.g. leafleting) to include coverage of local businesses, tourist destinations and other recognised institutions not under local authority control (e.g. Tourist Information Centres) in order to maximise potential effects.
- Make greater use of the collections themselves when promoting the library service. Examples include mounting in-library exhibitions; and taking special collections materials into schools to help support learning and widen access to/knowledge of collections in the process.

9.3.4 Web-based promotion

- Improve interlinking between main local authority websites and library homepages, with a direct link leading from the former to the latter to make the library pages more directly visible and accessible.
- Clearly define links to local studies/special collections pages from the library homepage.

- Increase the amount of detail in collection-level descriptions on the library website to improve their functionality as finding aids and thus increase accessibility.
- Add links to the DiadEM project and the Cornucopia website to provide users with easy access to resources that can locate collections relevant to their needs which are held within the county, or in other parts of the country.
- Introduce a weblog (blog) to act as a dual-purpose application to provide a “rolling” FAQ page and a promotional tool combined.
- Introduce discussion boards to encourage the development of local history communities of practice, engagement with the collections, and social learning.

[20,723 words]

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Appendix I

Information Sheet

Marketing of and Access to Special Collections in Public Libraries: Case Studies in the East Midlands

You are being invited to take part in a research project. Before deciding whether to participate it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Ask us if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for reading this.

Project Background

Much research has been carried out in relation to the marketing of and access to special collections, particularly in the research and higher education sectors. However, only a small proportion of the literature covers the public library sector specifically. This project will go some way to rectifying this situation.

By examining a series of case studies incorporating a number of the East Midlands' local authorities, and libraries holding special collections within them, this project aims to:

- To identify the current methods for the marketing of, and access to special collections within a set of five case studies chosen from the East Midlands region, and ascertain how they fit in with current practice as established by a review of the literature.
- To examine any trends that emerge regarding the aforementioned methods in both the physical library and on the Web and to see whether current and potential marketing methods relate to the achievement of national library policy goals.
- To provide practical, affordable suggestions of how better to market special collections in the aforementioned public library services (taking into account the limited funds provided by the public purse), and thus how access to these collections could be improved.

The project will run from 2nd June 2006 and will run until 1st September 2006, by which time the report will be complete.

Why have I been chosen?

You have been chosen to participate in this study because you are responsible for/in charge of special collections within your local/unitary

authority, and because your authority has been chosen as one of the case studies in this report. Up to four other people working in similar positions in separate authorities within the East Midlands will also be recruited for this project.

Do I have to take part?

Participation is entirely voluntary and the decision is yours alone. If you do decide to take part you will be given this information sheet to keep (and be asked to sign a consent form) and you can still withdraw at any time. You do not have to give a reason.

My participation and what it involves

Although the research process as a whole will take three months, your involvement will comprise of a single interview lasting approximately thirty minutes. You will be asked about attitudes towards the promotion of and access to special collections within your authority's library service, and about current policies regarding such matters.

The data collected from your interviews will be used in conjunction with data from two parallel studies, namely:

- A survey of the library pages of your local/unitary authority's website.
- A "mystery shopper" evaluation carried out at a selected library within your local/unitary authority.

Possible benefits of taking part

Whilst there are no immediate benefits for those participating in the project, it is hoped that this work will result in the development of practical and affordable suggestions to improve the promotion/marketing of and access to your authority's special collections. The aim is to devise a means of raising the profile of such collections in order to increase usage and improve general awareness.

Problems and complaints

Should you have any complaints about your treatment by the researcher or about the interview process itself, you can contact my supervisor, Ms Sheila Webber, at any time (see below for her contact details). If you feel that your complaint has not been handled satisfactorily you can contact the University of Sheffield's Registrar and Secretary to discuss the matter in more depth.

Confidentiality

All the information that we collect from you during the course of the research will be kept strictly confidential. You will not be able to be

identified in any reports or publications. Any data used from your interview, as well as data from the parallel surveys conducted regarding your specific local/unitary authority will be given a record number. This will replace any names and thus remove any possibility of your identification.

What will happen to the results of the research project?

The results of this project are likely to be available in the form of the final report itself from the beginning of 2007 at the latest. Copies of the report itself will be held by the University of Sheffield library (<http://www.shef.ac.uk/library/>). A copy will also be kept by the University of Sheffield Department of Information Studies (<http://www.shef.ac.uk/is/>) for a limited period of time. At no time will you be identified in any report or publication.

Who is organising and funding this research?

This project is organised and funded completely by the student researcher, James Andrews. At no time has the research relied upon an external body for funding.

Who has ethically reviewed the project?

This project has been ethically approved via the Department of Information Studies' ethics review procedure. The University's Research Ethics Committee monitors the application and delivery of the University's Ethics Review Procedure across the University.

Contact details

For more information about this project please contact either of the following:

James Andrews, [Full address] E-mail: [Given in actual information sheet]

Or

Ms Sheila Webber (project supervisor), Department of Information Studies, University of Sheffield, Room 234, Regent Court, 211 Portobello Street, Sheffield, S1 4DP. Telephone: 0114 2222641 e-mail: s.webber@sheffield.ac.uk

NB You will be given a copy of this information sheet, as well as a copy of the signed consent form to keep.
Thank you for your participation in this project.

Appendix II

Participant Consent Form

Title of Project: Access to and Promotion of Special Collections in Public Libraries: The East Midlands: a Case Study.

Name of Researcher: James Andrews

Participant Identification Number for this project:

box

Please initial

1. I confirm that I have read and understand the information sheet dated _____ for the above project and have had the opportunity to ask questions.

2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason. For more details contact James Andrews: Telephone: _____ E-mail: _____

3. I understand that my responses will be anonymised before analysis. I give permission for members of the research team to have access to my anonymised responses.

4. I agree to take part in the above research project.

Name of Participant

Date

Signature

Name of person taking consent
(if different from lead researcher)

Date

Signature

Lead Researcher

Date

Signature

Appendix III

Websites evaluation criteria adapted from Love and Feather (1998) and Smith (2005)

Finding aids:

1. Are there finding aids on the website?
2. Are special collections materials listed in the main catalogue?
3. Are there dedicated online catalogues for special collections?
4. Are there online handlists?
5. Are there collection descriptions?
6. What level of detail are they (e.g. collection level, overview, etc.)?
7. Are the collection descriptions searchable?

Digitised material:

8. Are digitised elements of the collection available?
9. Are the digital materials of low or high quality (e.g. merely decorative or suitable for studying)?
10. How many items are available digitally?
11. Is there an online exhibition?

Reference services:

12. Is there an e-mail contact address?

13. Is there an electronic form?
14. Is there any indication of when a reply can be expected?
15. Is there a Frequently Asked Questions (FAQ) page dedicated to special collections?
16. Is there a reference or special collections weblog?
17. Are there reference or special collections discussion/bulletin boards?

Structural context:

18. Is there a link from the Local Authority homepage to the library homepage?
19. Is there a webpage dedicated to special collections?
20. If so, is there a direct link from the library homepage?
21. Is it easy to find?
22. Are there links to the DiadEM project and/or the Cornucopia database?
23. Are there external links to other relevant collections, resources or organisations?
24. Does the site provide information regarding the location of special collections holdings?
25. Does the site provide maps/directions to the individual libraries?

26. Does the site provide information regarding access to special collections (e.g. opening hours, requirements for advanced appointments, etc.)?

27. Does the site provide copying information regarding special collections?

User and collections information:

28. Does the site provide statistics of special collections or website use?

29. Does the site provide a form to submit feedback?

30. Does the site provide a general overview of the collection – highlighting strengths, etc?

Appendix IV

Physical Promotion of Special Collections in Target Libraries – Methods Present / Absent in Unobtrusive Testing

- Is there an exhibition? Yes / No
- Is there evidence of seminars or talks that have been or will be given regarding the collections? Yes / No
- Is there evidence of publications (exhibitions catalogues, local history monographs etc.)? Yes / No
- Is there any collection-related merchandise (cards, postcards etc.)?
Yes / No
- Is there evidence of use of special events or activities (e.g. visits by local historians, collection-related authors, children's workshops etc.) to promote special collections? Yes / No
- Catalogues:
- Are there dedicated OPAC terminals? Yes / No
- How many?
- Are there handlists of collections in evidence? Yes / No
- Are there card catalogues in evidence? Yes / No
- Is it obvious where special collections are listed? Yes / No
- Is there evidence that electronic resources relevant to the collections are highlighted and advertised in the library? Yes / No
- Are there promotional giveaway materials related to the special collections or special collections department (e.g. branded bookmarks, pens etc.)?
Yes / No
- If so, what?
- Is there a library newsletter? Yes / No

If so, is there any mention of special collections? Yes / No
Are there any interactive displays relating to special collections (e.g. computer-based)? Yes / No

Are there posters / fliers advertising any of the special collections services, projects and / or events? Yes / No

Are there any other explicit methods of promotion? (Specify)

Appendix V

Dissertation Interview Schedule

General marketing:

1. What does the term “marketing” mean to you?
2. How important would you say the marketing of collections and services is in a public library setting?
 - a. Possible probe: What makes you say that?
3. How do you think library staff generally react to the prospect of marketing the library service as a whole?

Marketing policy of the Local Authority:

4. Is there a marketing policy in place for the library service in this Local Authority?
 - Possible probe: Could you expand on that policy a little please?
5. How is this marketing policy put into practice in relation to special collections?

Knowledge of users and access to collections:

6. How would you describe the profile of the main users of your special collections?
7. What mechanisms, if any, are in place to help you define special collections user groups?
8. What would you consider to be more important – concentrating on services for existing users or attracting new users?

9. How would you approach widening access to your special collections?
[NB thinking of catalogues, online handlists etc]

Methods of promotion:

10. What methods have been used for promoting special collections in the past?
11. Have such measures resulted in increased interest in, or use of these collections?
12. How important is a strong Web presence for the future use and development of your special collections?
13. Collaborative online projects such as “Picture the Past” have become more prevalent in recent years. What do you see as their main benefits?
14. Can you envisage your library service contributing to such a project in the future?

National policy:

15. In your opinion, can special collections be used to help fulfil some of the requirements set out in Framework for the Future? [e.g. measures to “build community identity” and “develop citizenship”; creating content for “culture online” (development of PN); as a tool to encouraging lifelong learning; etc.]

Appendix VI

Results of websites evaluation for case studies A-E

Criteria	Sub-headings	A	B	C	D	E
Online finding aids	Finding Aids?	Yes	Yes	Yes	Yes	Yes
	SCs listed on main catalogue?	No	No	No	Yes	Yes
	Specialised catalogue?	No	No	Yes	No	No
	Handlists?	Yes	Yes	No	No	No
	Collection descriptions?	Yes	Yes	Yes	Yes	Yes
	Level of detail?	C	C	C&I	C&O	C
	Collection descriptions searchable?	Yes	Yes	Yes	Yes	Yes
Digitised material	Available?	Yes	Yes	Yes	No	Yes
	Low (L) or high (H) quality?	L	L	L	-	L
	Numbers (how many)?	12	1	8	0	12
	Online exhibition?	No	No	No	No	No
Reference services	E-mail queries?	Yes	Yes	Yes	Yes	No
	Electronic enquiry form?	Yes	No	Yes	Yes	Yes
	Timeframe for enquiry feedback?	Yes	No	Yes	No	No
	Is there a special collections FAQs page?	No	No	No	No	No
	Reference/special collections weblog?	No	No	No	No	No
	Reference/special collections discussion/bulletin boards?	No	No	No	No	No
Structural content	Link to library homepage from Local Authority homepage?	Yes	Yes	No	Yes	No
	Dedicated special collections page?	Yes	Yes	Yes	No	Yes
	Direct link from library homepage?	Yes	Yes	Yes	-	No
	Easy to find?	Yes	Yes	Yes	-	No
	Links to DiadEM or Cornucopia?	No	No	No	No	No
	External links?	Yes	Yes	Yes	Yes	Yes
	Info about collections location?	Yes	Yes	Yes	Yes	Yes
	Maps/directions to relevant libraries provided?	Yes	Yes	No	Yes	Yes
	Access information provided?	Yes	Yes	Yes	Yes	Yes
Information about copying?	Yes	Yes	Yes	No	Yes	
User and collections information	Statistics provided?	No	No	No	No	No
	User feedback?	Yes	Yes	Yes	Yes	Yes
	General overview?	Yes	Yes	Yes	No	No

O = Overview description of collections

C = Collection level descriptions

I = Item level descriptions

Appendix VII

Comparative table of unobtrusive testing results¹³

Questions	A	B	C	D	E
Is there an exhibition?	No	No	No	No	No
Evidence of seminars/talks given regarding the collections?	Yes	No	No	Yes	No
Evidence of publications (exhibition catalogues, local history monographs etc.)?	Yes	Yes	Yes	Yes	No
Is there any collection-related merchandise (cards, postcards etc.)?	No	Yes	Yes	No	No
Is there evidence of special events/activities (workshops etc.) to promote special collections?	No	Yes	No	No	Yes
Are there dedicated OPAC terminals?	Yes	No	Yes	Yes	Yes
If so, how many?	1	N/A	1	2	2
How many public use computer terminals are there in total?	4	7	5	37	36
Are there handlists of the collections in evidence?	Yes	Yes	Yes	No	Yes
Are there card catalogues in evidence?	Yes	Yes	Yes	No	Yes
Is it obvious where special collections are catalogued/listed?	Yes	Yes	No	No	Yes
Are electronic resources relevant to the special collections highlighted/advertised?	Yes	Yes	No	Yes	Yes
Are there promotional giveaway materials (branded bookmarks, pens, postcards etc.)?	Yes	Yes	No	No	Yes
If so, what?	P*	B&P*	N/A	N/A	B
Is there a library newsletter?	No	Yes§	No	Yes§	No
If so, is there any mention of special collections?	N/A	Yes	N/A	Yes	N/A
Are there any interactive displays (computer-based or other) relating to special collections?	No	No	Yes	No	No
Are there posters/fliers advertising any of the special collections services/projects/events?	Yes	Yes	No	Yes	Yes
Are there any other explicit methods of promotion?	No	Yes ¹⁴	No	No	No

P = Postcards.

B = Bookmarks.

* = Part of a collaborative project run with other Local Authorities.

§ = Dedicated special collections/local studies newsletter.

¹³ Testing is of Special Collections departments only where segregated from main library services, but the whole library where the building is open-plan.

¹⁴ Displays of relevant local history CDs (i.e. talking books).