

## Chapter 8

# Strategy, Intentionality, and Impact:

## A Purchasing Plan for Library Promotional Swag

Zackary Chance Medlin

*Program Assistant for Learning and Outreach, Texas A&M University*

Stephanie J. Graves

*Associate Professor, Director of Learning and Outreach, Texas A&M University*

Sarah LeMire

*Assistant Professor, First Year Experience & Outreach Librarian, Texas A&M University*

## Introduction

The labor and expense involved in developing a comprehensive outreach program can be overwhelming. There are often additional expenditures for marketing and promotional items to support the outreach events that go beyond costs of planning and staffing outreach activities. The Texas A&M University Libraries boast a robust outreach program—library employees participate in more than 100 outreach activities each calendar year. We developed programmatic strategies for improving the cost and labor efficiency of both purchasing and managing the distribution of

library-branded promotional items as a part of these outreach efforts. Colloquially, these items are known as swag. This chapter will provide insight into why and how we created a swag inventory system to support our outreach program.

## Description of Institution

Texas A&M University in College Station, Texas is a very large (60,000+) public institution. The undergraduate student population is predominantly under the age of 25 from within the state, although the campus has a significant group of international graduate students. The University Libraries consist of five campus libraries with library outreach coordinated by the Libraries' Learning and Outreach unit. The University Libraries connect with incoming students by participating actively in campus and library outreach events. These include campus orientation fairs (New Student Conferences), intensive orientation camps, and a multitude of department- and organization-level outreach activities.

## Outreach Problem Addressed

We began thinking strategically about the scope of our outreach efforts due to a growing campus and a correspondingly large number of outreach activities to manage. Many outreach events involve the dissemination of library swag, from small items such as library-branded pencils to significant giveaways such as custom T-shirts. A substantial portion of the Learning and Outreach budget is devoted to supporting outreach events and promotional items but the number of outreach opportunities continues to grow. The increasing demand for swag items required increasing efficiency to relieve strain on our budget. We developed an inventory system for purchasing, inventorying, and distributing library swag to stretch the budget and maximize impact.

## How We Did It

### Developing a Swag Inventory System

**Laying the groundwork.** The process of developing a swag inventory system involved several steps. The first was to be sure that we were tracking all University Libraries' outreach activities. This involved bringing together library outreach stakeholders to consult their calendars and identify all outreach events they participated in during the previous year. We then made a calendar of events, which helped us not only understand the full scope of the University Libraries' outreach

program but also helped us identify and avoid potential event conflicts and helped with the scheduling of volunteers.

Once all the events for the year were identified, the next phase of the process was collecting and recording more detailed event information to assist with future planning. Useful data included event sponsorship, audience, and location. We included contact information for the sponsoring unit if the event was sponsored outside of the library. We also identified an individual within the University Libraries who would serve as an event manager. This process helped with planning, communication, and ownership of library outreach activities. Other stakeholders and strategic partners who should be included in decision-making were also listed. A spreadsheet was used to collect and organize outreach event data.

Libraries looking to undertake a swag inventory system, or even a review of their outreach program, should not skip the vital step of reviewing their outreach event year. For a more comprehensive and in-depth view of a library's outreach program, librarians can apply curriculum-mapping techniques to gain insights into the populations present at specific outreach events and the learning objectives of each event (LeMire & Graves, 2017). At a minimum, a review of outreach activities should include information about target populations for each event. In order to plan and develop activities for an event, it is critical to know the intended audience and the size of that audience. This information also helps inform decisions on what types of swag are appropriate and how many units should be brought to each event. For example, at an event where we are standing on stage in front of 1,000 students, it is far more appropriate to bring T-shirts to toss into the crowd than it would be to try to pass out library-branded pens. This analysis also helps identify overlaps in outreach audiences. For events with significant overlap in student populations, we prefer to bring different swag to encourage the sustained return of students at events.

**Taking stock.** After reviewing our yearly outreach activities, the next step was to identify the swag we already had in stock. Swag had been acquired over the years and leftovers were stored in multiple locations within the University Libraries. Much of this had not been inventoried, so taking stock was crucial to defining the scope of our inventory. This was a labor-intensive process. It required counting each piece, taking a picture of a sample, and consulting purchase receipts to record the exact price per item. This information was recorded in a spreadsheet.

Depending on the size, variability, and level of organization of existing swag stock, this step may or may not be necessary for all libraries developing a swag inventory system. However, this step proved to be important to our process as it helped us identify important information to record about each item to ensure that our inventory system would fully meet our resource tracking, event planning, and administrative reporting needs.

**Determining functionality.** Although some of our needed functionality was identified during the process of completing an initial inventory, there were other

considerations and constraints related to our local context and needs. Available storage space for swag was a critical factor in determining necessary system requirements. Our stock is housed in a storage room separate from the Learning and Outreach office. Multiple library employees have access to, and are permitted to retrieve, promotional items as needed. Therefore, any inventory system created would need to be interactive and easily accessed by multiple stakeholders to make updates seamlessly.

We also determined that an inventory system that could handle relational input forms was key to a successful system. Additional functionality included the ability to color code items, provide formulas for automatic calculations, and the ability to embed photos or link to images of items. With this functionality in mind, we began looking for appropriate tools. Our campus had recently acquired a site license for Google products, so Google Sheets (<https://www.google.com/sheets/about/>) and Google Forms (<https://www.google.com/forms/about/>) were identified as tools that could fulfill our needs.

**Development.** Using the data collected in the initial steps of the process, the Learning and Outreach Program Assistant took the lead in developing a swag inventory system. A Google Sheet was created with swag items represented in the columns and outreach events represented in the rows (see Figure 8.1). Column clusters for each swag item helped organize information.

Item Details	Brown Notebook Remaining: 1962					Black Notebook w/ Business Remaining: 360					Eco-Notebook Remaining: 2543					Grey Pocket Folder Remaining: 34				
	Started with:		Used:			Started with:		Used:			Started with:		Used:			Started with:		Used:		
	2500	538				1000	640				3000	457				250	216			
Used for	# Taken	# unused	# used	\$	Used for	# Taken	# unused	# used	\$	Used for	# Taken	# unused	# used	\$	Used for	# Taken	# unused	# used	\$	
Young Ladies Success Seminar 2/28/15 Patty	1	0	1	\$1.07	Young Ladies Success Seminar 2/28/15 Patty	1	0	1	\$1.45	Undergraduate Research Expo 9/30/2015 Sadie	210	175	35	\$33.25	HS Library Instruction 10/2/2015 Tamara	10	0	10	\$6.90	
Doug	60	0	60	\$64.20	International Resource Fair 1-15-2015	200	135	65	\$94.25	International Scholar Resource Fair 9/25/2015 Katrina	96	82	14	\$13.30	HS Library Instruction 10/2/2015 Hunter	1	0	1	\$0.69	
Constitution Week Talk 9/18/2015 Skeeter	45	11	34	\$36.38	Grad Camp Skeeter	240	0	240	\$348.00	ILS New Staff 9/16/2015 Sandy	2	0	2	\$1.90	High School 10/9/2015 Hudson	1	0	1	\$0.69	
College of Liberal Arts Transfer Resource + Academic Connection Fair 9/23/2015 Patty	150	124	26	\$27.82	Ag Engineering Roger	40	0	40	\$58.00	Grad Dinner - Library Intro 10/15/2015 Cassie	7	0	7	\$6.65	High School 10/30/2015 Tamara	1	0	1	\$0.69	

Figure 8.1. Item Tab in the Swag Inventory System.

There are several item details included about each item in the column cluster:

- Detailed description of the swag item. We find that it is helpful to use the same description that vendors use because it makes reordering much simpler.

- Number of units ordered (or initial count). This information can be useful when reordering for the next year's event. It is also necessary for proper calculations.
- Number of units remaining. The number of a particular item that is left in stock. This number is vital for an accurate representation of inventory.
- Cost-per-unit. This number enables us to make automatic calculations that can aid in budgeting for events.

Each event from the previously defined outreach timeline was added as a row on the spreadsheet. There are occasions when there are multiple iterations of the same event. For example, there are approximately 20 New Student Conferences each summer. Each event is distinguishable by the unique date on which it occurred, which is reflected in a field on the swag inventory.

Items we also included in the spreadsheet are:

- Event details. This information includes the event name, date, time, and the library contact for the event.
- Number of units taken. This field represents items taken from the swag closet for use at the event.
- Number of unused units. This is a count of units that were taken but not given out at the event.

Using the data entered above, the swag inventory system automatically calculates and displays a few other important pieces of information.

- Number of units used. The spreadsheet automatically subtracts the difference between the “number of units taken” and “number of unused units” from the “number of units remaining” prior to the event in order to provide an up-to-the-minute count of remaining stock.
- Reorder indicator. Conditional formatting was created to have the “number of units remaining” cell automatically change colors when certain thresholds are reached. The thresholds were set based on how quickly we can reorder an item and its relative popularity and use. When the “total items remaining” cell changes color based on the threshold, it is a signal that reordering is needed.

As our inventory has grown, so has the variety of items. To facilitate quick review of available items and reduce scrolling, it has become useful to group like items together in their own categorized sheets. This makes the spreadsheet more manageable and can aid users in locating a particular item quickly. For example, we have a writing utensil sheet with the pencil, pen, and highlighter item columns. We created a master sheet that listed the item's description, which is linked to a sample image of the item, and the total units available, which can be pulled using formulas from the other sheets in the spreadsheet.

Although one of the main purposes of the inventory system is to facilitate tracking, managing, and ordering swag, another primary goal was to improve library faculty and staff access to materials they could use to support their outreach efforts.

There are more than 200 people involved in our outreach programs (including librarians, staff, and student workers), and many of these library employees will want to use swag. Our inventory system needed an interface that library employees could access to request swag for an event. Using Google Forms, we created an online order form that allows those individuals to order swag from the inventory system in preparation for events (see Figure 8.2).

**InvenTori** Search this site

**Swag Request Form**

Librarians and staff can use this form to request University Libraries swag to support their typical classes, workshops, and orientation events.

Should you need specific swag for a scheduled event (GIS Day, Edible Books Festival, Open House, etc.), please schedule a meeting with Patrick Zinn to discuss your needs.

Please allow several days for L&O to process your request.

\* Required

Your Name:

Date needed by: \*  
When should these be ready?  
mm/dd/yyyy --:--  
Example: 03/09/2013 11:30 AMT

Class or Event Information \*  
What is this needed for?

Do you know what you want?  
Do you have an idea what you would like, or would you rather us just provide what we think is best?  
 I know what I want.  
 I want you to provide what you think is best.

SWAG : \*actual available swag may vary

TAMU LIBRARIES SWAG	
Handouts	Quantity
2-Trimming-Sil-Fold	120
Adult's Postcard	548
Graduate Brochure	111
"Find Your Way To The Libraries"	8191
Blinn TEAM	831
"Welcome To The Libraries"	1000
<b>Notebooks</b>	
Stream Notebook	2176
Black Notebook with business card holder	120
Brown Notebook with pen	975
Black Notebook with Pen	98 (cant find)
Pocket Folder	196
White Spiral Noteb	98
<b>Writing Devices</b>	
Subject Pencils	0
Black Pens	5
Maroon Pens	4173
4-Color Pen	245
Clip-On Highlighters	26
Maroon and White Pencil	875
<b>Keychains</b>	
White Flashlight Keychains	100
USB Drives	419
Silver Flashlight	0
<b>Bookmarks</b>	
Subject Librarians	1622
Research Guides	1946
Media & Reserves	1110
Coffee Cups	

Figure 8.2. Outward-Facing System as it Appears on the Intranet.

Information obtained from the form includes contact information, event information, the date the swag is needed by, and delivery/pickup preferences. Library employees can choose to request swag from the inventory master sheet or opt for the Learning and Outreach staff to help them select appropriate items. When the form is completed, an email is sent to Learning and Outreach so we can fill the request. The master sheet from the inventory spreadsheet is displayed next to the request form on an intranet page for easy access. The master sheet only includes pertinent information to those making requests. This includes the description, a link to the image, and quantities available. This leaves the nitty-gritty details only available for those Learning and Outreach members working behind the scenes. We also find it useful to have paper order forms that can be filled out (see Figure 8.3). These paper versions act as labels on boxes that travel with library employees to events, are useful when accessing the online form is inaccessible, and are helpful when recounting items after the event is over. Information from this paper form is added to the item sheet in the electronic system.

Event:
Date:
Library Employee:

Item Description	Taken	Remaining	Given Out

Figure 8.3. Paper Swag Event Form.

## Using the Inventory for Data-driven Decisions

The swag inventory system has become a tool for strategic outreach planning because it collects both swag availability and usage data. A key piece of information it provides is an estimated swag cost-per-event for completed events. As we plan for events each semester, we now have access to data from previous events that can help us predict costs and create a budget that accounts for each major outreach event and builds in capacity to respond to new outreach opportunities.

The swag inventory system also provides us with information that can help guide swag-purchasing decisions. Another important data point is the estimated swag cost-per-attendee at an outreach event. This information helps us purchase swag that will fit the budget for a given event. The desired swag cost-per-outreach event attendee can vary from event to event, depending on the level of impact that the library expects. High-impact events may be worth a little more investment. Data on the swag usage-per-event also provides us with a general barometer of swag popularity. By reviewing data on previous outreach events and audiences, we can surmise that faculty responded well to pens while students were more apt to take iPad chargers. Finally, considering overlaps in outreach event audiences and popularity of swag with different populations helps us identify swag that could be used for multiple events, which allows us to purchase in bulk and reduce the cost-per-item. Selecting swag that does not include a date or event specific information makes it evergreen, meaning that its usefulness will not expire after a period of time, and can help stretch our outreach budget.

We begin ordering after we have planned our swag event budgets for the season. We work with promotional vendors to get the best pricing, using price matching with competitors. We also request a sample item. This is an important step to avoid ordering something that does not meet our expectations and having to send it back. When items arrive, detailed information including description, number of units ordered, and cost-per-unit is added to the swag inventory spreadsheet. If the item is earmarked for a specific event, it does not appear on the general order form for library staff to use; it is entered into the swag inventory but held aside for the event. Once the event is over, any remaining items then go into the pool of swag for general use.

## Cautions

One of the biggest challenges of a large-scale library outreach program like ours is maintaining a focus on the big picture. While it is easier to approach each outreach event one at a time, planning a whole year's events can maximize impact and resources. Planning helps ensure that you have ordered, received, inventoried, and made ready all necessary swag and that you have sufficient time to update your inventory. This aids in the identification of available swag resources and helps generate up-to-date reports to better understand the scope and impact of recent events. Long-term planning can also help extend financial resources. Swag prices decrease per unit when purchased in larger quantities and bulk purchases can accommodate multiple outreach events. This strategy works especially well when there are two distinct populations at two different events. Building a swag inventory system can force this intentionality and planning, both for thinking strategically about outreach events and critically analyzing costs

## Assessment

Assessment of a library outreach program requires considering a variety of different elements. One element that is often overlooked is assessing swag the library is purchasing. Is it popular? Is it meeting your objectives—for example, is it helping to draw students over to your resource table? Assessment of library swag can take on many forms, both formal and informal. One simple assessment is keeping count of how many swag items are picked up at a particular outreach event and throughout the year. We accomplish this by packing swag in predetermined numbers for events and then subtracting any remaining items after the event using the swag inventory system. This not only helps us track the number of promotional items that are distributed, but it also helps us gauge an approximate number of contacts we made at an event, which is also helpful for assessing the impact of the event. The swag inventory records this information in a transparent and centralized system.



If you are participating in similar outreach events every year, analyzing swag counts from each year can be another form of assessment. An uptick in swag distribution may indicate that students enjoyed the promotional product. The swag inventory allows us to easily track promotional items per event and from year-to-year. Additionally, we gather feedback from those distributing the swag at events. We typically ask event volunteers to participate in a post-event survey or plus/delta meeting. Volunteer feedback helps gather anecdotal evidence about how students respond to the swag provided at each event. Narrative stories gathered from volunteers can help support the quantitative data and tell a compelling narrative about the success of particular promotional items. A notes field in the swag inventory system can be used to record this information.

## Reflection

After two years, the swag inventory system has clearly been helpful in managing our outreach program inventory. The creation process was beneficial in helping stakeholders understand the breadth of the events and students seen during the academic year. Library employees have responded positively to the order form and appreciate the ease with which they can make requests for swag items. Administratively, the system has aided in generating reports and showing a more intentional use of budgeting and expenditures.

## References

LeMire, S. & Graves, S.J. (2017, May 13). Increase your yield: Scaffolding outreach using curriculum mapping. Interactive workshop presented at the meeting of LOEX, Lexington, KY.