

**OUTREACH PROGRAM AT THE SCRIPPS INSTITUTION OF
OCEANOGRAPHY LIBRARY: TARGETING FACULTY, RESEARCHERS,
AND STUDENTS**

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ABSTRACT: With the proliferation of electronic resources and the demands on researchers' time, desktop delivery of information has become even more essential to our clientele. The geography of the Scripps Institution of Oceanography, in addition to this dependence on desktop delivery, and remote access to library resources and services, has shifted library clientele almost entirely from on site actual users to off site virtual users.

To assure that these remote users are finding and accessing all relevant resources for their research and instruction, the library developed a detailed outreach program to target faculty, researchers and graduate students.

To increase graduate students' attendance at library orientation classes and tailored one-on-one consultations, incentives in the form of \$10 and \$20 gift certificates to the coffee stand adjacent to the library were offered. An added incentive that further increased graduate attendance at classes and consultations was the raffling of iPods to attendees. Undergraduate students were invited to the library by using advertising in campus publications, and signs in other, more crowded branch libraries.

As part of this outreach program, Scripps faculty and researchers are contacted, department-by-department, with phone calls to their offices, a systematic "cold calling" program. The goal of the "cold calling" was to contact each academic to ascertain if their informational needs were being met and if they were informed about the latest databases and electronic resources the library offered in their subject disciplines, and to offer consultations, individual or group sessions, in their offices or laboratories.

Success of the outreach program is being measured by increase in library gate-count, attendance at classes and consultations, and initial contact to all current academics at SIO.

KEYWORDS: Library outreach programs; library instruction; consulting services; marketing.

Introduction & Background

The Scripps Institution of Oceanography is over 1 mile west of the main University of California, San Diego (UCSD) campus. The Scripps campus is fairly large with departments spread out all around this western area, with some structures built into the hill-side, up at the top of a steep hill, and down right on the beach and around the Scripps Pier. There are also some more remote departments in Point Loma, over 10 miles south of the campus, by the SPAWAR and submarine facilities.

Thus, Scripps researchers and graduate students could be all over the campus, at home, visiting other institutions, visiting other countries, collaborating with other researchers, on sabbatical, literally all over the world conducting research.

Our Main Objective

Being a part of a spread out campus, with faculty, researchers, and graduate students all over the Scripps hillside, and possibly the world, our main objective is to provide our resources (databases, electronic journals, reference works) and services (desk top delivery of print items, reference assistance) where and when they are needed most.

The Challenge

With the increasing demands on researchers' time, and the proliferation of electronic resources, we have found that the demand for desk-top delivery of information has caused a drop in the library gate-count. In the recent past, around 3-4 years ago, there was a consistent decrease in people visiting the library.

Most of the buildings at Scripps have great views, in addition to being spread out over the area hillside, so faculty, staff, and students are not motivated to leave their offices/labs to use the library given that they can access most journals electronically. Undergraduate students on the main campus are generally unaware of the Scripps Library, which is a short campus shuttle ride away.

Outreach Goals

Our outreach goals were very basic. For the graduate students our goal was to provide incentives to increase attendance at consultations and classes, and to imprint the outreach librarian on them as their library contact person.

For the undergraduate students our goal was to promote the library as a quiet (with nice views of course), accessible place to study, since most of them are unaware that it exists in its off-campus beach location.

For the Faculty & Researchers our goal was to have a systematic plan to contact every current academic in all Scripps departments and imprint the outreach librarian on them as their library contact person.

Outreach Plan

To have a systematic approach to academic and graduate student outreach, a detailed plan was drafted by the outreach librarian and the library director.

After following the plan for several months, experience gained led to revisions to adjust the workload, such as the number of people targeted each week, and to document time spent, and define the measure of success in meeting the goal. We kept track of time spent to demonstrate to the busy outreach librarian that the time consumed in achieving the modest mutually-agreed goals was not an inordinate or unreasonable call on the librarian's time, and to heighten the librarian's awareness of the importance of balancing outreach work with other calls on the librarian's time.

The plan was put in place to outline outreach efforts to graduate students, such as offering them incentives to take the time to attend consultations and/or classes and distributing of promotional items such as pens and gift certificates.

The plan also detailed the systematic contact of faculty and research academics by making phone calls to their offices to offer them library instruction and consultation.

A year later, outreach efforts to undergraduate students were added to the plan.

Outreach to Graduate Students

Graduate students in their first year were specifically targeted. The Outreach Librarian was invited to speak at the general orientation for the new first year graduate students, the week before classes started. This entailed only a 10 minute time-slot in a busy afternoon schedule filled with different faculty members and graduate advisors presenting about programs, services, and what to expect in the next few years.

During this orientation day the graduate students were being bombarded with information and would remember very little, so the librarian resorted to doing a very brief presentation about the library website, where to find listings of resources and services, distributed promotional pens and magnets (fig. 1), and then invited the graduate students to drop by the library for classes during orientation week and the first week of the quarter, or to sign up for individualized consultations.

To entice the first year graduate students to attend the library orientation classes or schedule consultations, gift certificates to the coffee & snack bar adjacent to the library were offered.



Fig. 1 – Promotional magnets

These gift certificates were very popular. The Cups coffee shop is conveniently located adjacent to the library, a nice redwood deck with a great view and wireless access, offering coffee, juices, lunch salads and sandwiches, and snacks. Students are invited to bring their food & drinks into the library.

For attending the drop-in 30 minute library orientation class, a \$10 gift certificate was offered. A \$20 gift certificate was awarded to those students scheduling and attending one hour, one-on-one, individualized consultation sessions with the outreach librarian. The Library places a higher value on individual instruction, where more time can be spent on specialized databases depending on the student's focus areas, so individualized consultations were awarded the higher value certificate. For example BIOSIS database searching is covered in depth for Marine Biology students, while the GeoRef database is covered for the Geosciences students, the Meteorological and Geostrophysical Abstracts database for the Climate Sciences students, and the INSPEC database for the Physical Oceanography students.

The purpose of the gift certificates was to imprint the outreach librarian service on them, and there is no penalty, or expiration date, if they don't take advantage of the service during their first year. To increase attendance during their first year by offering an even bigger incentive in Fall 2005, 4 iPod Shuffles were promised as prizes in a raffle. To enter this raffle a graduate student would need to attend a library class or consultation session. Then, in Fall 2006 the raffle prizes promised were upgraded to 3 iPod Nanos.

This graduate student outreach program has undergone fine-tuning since initiation, in order to increase the percentage of students participating in their first year. Overall the program has been very successful, especially considering the fact that all the library classes and consultations have not been part of the students' curriculum, rather by their own choice and attended on their own time. So reaching around half of these graduate classes in 2003 and 2004 was pretty successful, and reaching over 75% of them last year was awesome.

The consultation sessions are requested and scheduled over the whole academic year, not only in early fall, and the drawing of names for the iPod prizes is in Spring. Attendance is improved by sending the students an email reminder about the consultations, gift

certificates, and iPod raffle, especially right before the Winter Quarter holiday break and the Spring Quarter break. These emails generated several responses, and consultation sessions, from students who were in town and not over-committed with attending classes.

Measuring Success – Graduate Students

In 2003 there was relatively low attendance at classes, and fairly good attendance at consultations, probably due to the \$20 gift certificate (instead of \$10), and due to the consultations being more tailored to their needs, scheduled at times that would be more convenient for them, and offered during all 3 quarters.

In 2004, 50% attended classes or consults, and there was a marked increase in class attendance due to more classes (10 drop-in sessions instead of 5) offered during the week before formal instruction began.

In 2005, 76% attended classes or consultation sessions. This 25% increase was due to several factors: sending out a number of email reminders, scheduling 5 additional drop-in classes, and having a raffle with the possibility of winning one of 4 iPod Shuffles.

In 2006, 21 classes were scheduled, and the raffle prizes offered are 3 iPod Nanos. The reason we offer classes, while we value the one-on-one consults, is that some of the shy students prefer the classes.

Outreach to Undergraduate Students

Why did we decide to include undergraduate students, since Scripps is a graduate research institution?

- Because of the increase in undergraduate enrollment at UCSD and the UCSD Libraries targeting undergraduates in their outreach efforts.
- Plus the upper campus library branches were filled to capacity while we had seats to spare.

How did we reach out to the undergraduate students?

By using our quiet, and attractive beach front location as a draw, and putting that on posters and in eye catching campus newspaper ads and student publications

Advertising

Initially, around 3 years ago, the Scripps Library advertisements placed in the campus newspaper were quite plain and cluttered with words, the plain text look was definitely not that eye-catching.

Starting in Spring 2005, a more colorful ad (fig. 2) was designed, larger ad space was purchased (quarter page), and timing was before final exams. In the following quarters

the ad size was reduced a little, but color was maintained, and an additional ad placed a little earlier in the quarter.



Fig. 2 – Ad in campus newspaper

Plans are to keep placing ads in the campus newspaper, several times a quarter, and other student publications such as the new freshmen's "Student Survival Guide".

In addition to the ads in the campus newspaper, publications, and UCSD Libraries newsletter, signs were designed (fig. 3) and posted in other library branches, and the campus student center food court around finals week.

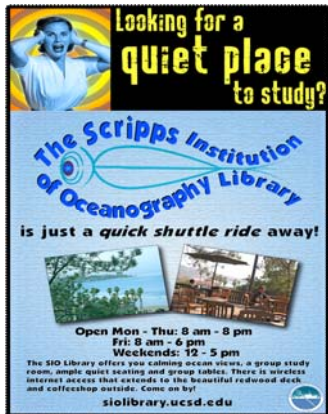


Fig. 3 – Signs posted around campus

To increase the welcoming atmosphere in the library during finals week, refreshments and a “good luck with finals” sign were placed on a table by the library entrance.

Measuring Success – Undergraduate Students

A very good, though anecdotal, measurement of the success of promoting the library with ads in newspapers and posting signs, was the noticeable increase in undergraduate students using the library.

Outreach Budget

There certainly is a cost for all of this outreach: the gifts, and the promotion of the library in various publications. An annual outreach budget was put in place, and revised for 2006/07 to reflect the cost of more frequent newspaper advertising, upgrading to new generation of iPods and refreshments during each quarter’s finals week. Sample outreach budget:

Outreach Budgetary Plan: \$3,800

Cups gift certificates for new Grads	\$ 750
Cups gift certificates for prospective Grads	\$ 375
iPODs for raffle (3 Nano types)	\$ 450
Magnets/pens PR freebies	\$ 600
2 Color Guardian ads Fall Quarter	\$ 496
1 Black & White ad Fall Quarter	\$ 98
1 Color Guardian ad Winter Quarter	\$ 248
2 Black & White ads Winter Quarter	\$ 196
1 Color Guardian ad Spring Quarter	\$ 248
1 Black & White ad Spring Quarter	\$ 98
Signs promoting library	\$ 50
Refreshments for finals week	\$ 225
Total	\$ 3,834

Outreach to Academics

The goal of this outreach program was to contact each academic, department by department, to introduce the outreach librarian, and to ascertain if their informational needs were being met.

Methodology entailed compiling lists of current academics in each department. The plan for the first round of outreach avoided contact of postdoctoral scholars, visiting scholars, adjunct professors, or emeritus faculty. Outreach to these other academic populations was put off until the longer-term active and permanent academic population was addressed. Priorities had to be set. The target list contained names of current faculty members and researchers- research assistants, specialists, lecturers, and project scientists.

After the first round was accomplished, with all current Scripps academics in all departments contacted, the new post-docs and visiting scholars are contacted around the time they are appointed.

After the list of academics is compiled the outreach librarian searches departmental and individual websites to ascertain their areas of research and publications.

Several specialized databases are searched for each academic's publications. Routinely 4-5 databases are searched for each academic, and depending on their research focus more specialized databases may be consulted. For example, searches of the Aquatic Biology Aquaculture & Fisheries Resources, BIOSIS and Zoological Record databases for the marine biologists; SciFinder Scholar (Chemical Abstracts) for academics in climate chemistry or chemical oceanography, INSPEC for those in physical oceanography and geophysics.

Then the list of academics is annotated to include the search results for all databases in their areas of research, the top 3 databases, where most of their publications are indexed, are the ones mentioned during the phone conversation.

Cold Calling

After compiling and annotating the list of each department's Academics, the phone calls, "cold calling", proceed following a prepared script.

Cold Call dates and responses are noted on the list of academics to facilitate keeping track of contacts and to follow up in a few days for those not contacted during the first call. Detailed messages with librarian contact information are left with the academic's voicemail service.

If not contacted after 3 phone calls, a follow-up email message is sent detailing the consultation offer, a listing of databases relevant to the specific academic's research areas and mentioning important library services, such as document delivery and current awareness alerting services.

Recently, sending out confirmation email messages were added to the outreach plan. These email messages are sent as follow up to academics contacted by phone, to assure that the librarian's contact information was available to them when they need it.

Armed with the list of academics, their research areas, and appropriate databases for their topics, the outreach librarian follows a prepared checklist type of script (fig. 4) for the cold calls.

The reasoning behind this was that by asking a series of specific questions about their awareness of databases in their field, electronic resources and services that the library

offered, the librarian verified if the academics knew as much about library resources and services as they might think they do.

Script & Checklist for Cold Calls:

Good morning/afternoon Prof/Dr. _____. This is Amy Butros, I am the Outreach & Instruction Librarian at the SIO Library. I am calling to introduce myself, give you my email & phone # in case you have any questions about our library resources and services, or if you'd like an **individual or group demo** of any of our resources or services.

Links to all of these resources, and a description of our services, are available from our **Website** at: <http://siolibrary.ucsd.edu>

- List of Relevant **Databases** (right side of website) and key databases at SIO, for your subject areas, we would recommend the following databases*
- Access to **Electronic Journals**: via **ROGER** – or browsing via the Electronic Journals list (under Resources & Collections)
- Getting copies of articles – **Avanti** for items we own, but not available electronically. – ILL forms for items we do not own, best place to find is via the **Contact Us** page on our website
- Use **UC-eLinks** from most of the databases to find full text of article, or to **Request** items
- For convenient email updates of search topics (**Alerts**) from databases such as BIOSIS, GeoRef, Web of Science, and Zoological Abstracts

Fig. 4 – Checklist used for phone calls to academics

Outreach Results

The immediate benefit of these “cold calls” was that several academics asked specific questions in response to the series of topics, resources and services covered, and the outreach librarian resolved their access or searching problems during the telephone conversation.

The academics’ thanks and positive reception to library services and resources was very rewarding and encouraging to hear.

Some “cold calls” resulted in the scheduling of individual consultations with the academics, mainly held in their offices, to assist them with database searching, online requesting of documents, access to electronic journals, and bibliographic software program use (EndNote).

At minimum all contacted academics now have imprinted the name of the outreach librarian for any future questions they may have. Imprinting the outreach librarian has proved to be important in our environment of remotely accessed resources and services. Even when a consultation offer is declined, subsequent announcements to the Scripps

community of new resources or services have resulted in queries for assistance from the outreach librarian.

Anecdote: a faculty member sent a question about remote access this past January, 2006, as a 'reply to' the outreach email message, which was sent to him in January 2005 - a year before the need! The academic kept that library contact email for future referral and use.

Measuring Success – Academics

The performance of the outreach librarian in cold calling academics is measured by the number of first-contact cold calls placed in a time period set by agreement with the supervisor. Follow-up procedures are in place when no contact is made that first time. The goal for the number of first-contact phone calls to be placed within a set time period can be modest since the target population isn't that large. This workload is spread out over many months, since there seems little need to cycle through the entire academic population within a relatively short period of time. Therefore this outreach effort is modest and can be integrated into the outreach librarian's overall workload. Making the service available, as measured by the first contact call, is perhaps the best measure of performance for the outreach librarian, since everything occurring after that is not within the control of the outreach librarian. Certainly whether or not an academic wishes to discuss library resources and services at length on the phone or in personal consultation should not be a performance measure (or measure of success for the program) for the outreach librarian. An academic declining phone or in-person consultation is at minimum made aware that someone is available for their information consultation needs. A follow-up request for assistance on their own initiative or a renewed contact in a few years by the outreach librarian may result in individual consultations.

A great "side-effect" of the amount of time spent researching resources and searching specialized databases was that the outreach librarian's knowledge and expertise were strengthened and expanded.

A very positive result of leaving the librarian contact information with the academics in different departments, is that new hires, staff and research assistants, have contacted the librarian stating that they were told to call her to set up a consultation to be introduced to the library resources and services.

After 3 years of cold calling Scripps academics, all of the departments have been contacted. This first round of phone calls and emails was completed in July 2006.

The first round focus was placed on current, permanent, academics, that would be faculty and researchers, not targeting emeriti, visiting scholars, or post-docs, the target audience was 227, not the full Scripps academic population of around 390.

Since we are measuring success by the number of academics contacted by these "cold calls", and not by the number of academics who participated in consultations, our

significant achievement is that 49% (fig. 5) of all current academics were reached by phone calls. It can be difficult to reach scientists via telephone. While we do follow up with emails for those we cannot reach via telephone, we consider reaching half of them with a highly personalized telephone conversation to be a significant achievement.

This 14% does not include all consultations or requests for help that the librarian receives routinely (the graduate students, new faculty, emails and calls with questions, etc.), only those initiated by the outreach librarian through the “cold calling” program.

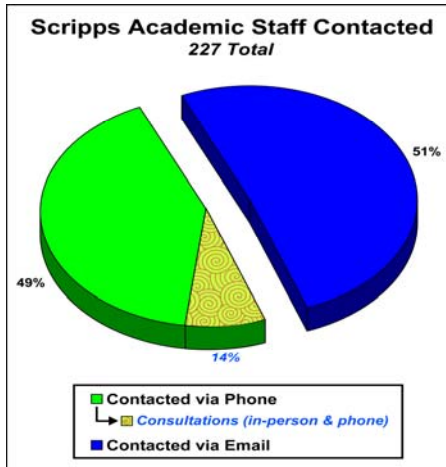


Fig. 5 – Percentage of Academics contacted

Future Plans

Contact all academics not reached by phone in the first round of “cold calling”, starting with the first department contacted.

Contact academics who reacted positively to the offer of a group demonstration of databases or resources.

Target newly appointed post-docs and visiting scholars listed in the quarterly list of academics distributed by Scripps academic personnel office.

We have a plan in place to offer specific classes where need was observed, e.g. EndNote and any new database interface (e.g. Zoological Record, multi-database searching, etc.).

Investigate and discuss ways to follow up with those who participated in consultations, and classes, to assess learning and explore any future or continued needs.

Contact Management Database

The plan for organizing and automating data collection & retrieval entailed selecting an appropriate database. After using Excel for the first few entries, the librarian decided to look for a database that was designed specifically to manage client type contacts. One of the most powerful and widely used databases for contact management was “Act”. Act was a bit too complex for the library’s needs, it was designed for big companies and for sharing of large amounts of data over networks. A more basic, and easier to use, program was Time and Chaos’ Contact Management database. It was easy to train a staff member to assist the librarian with data input into this program; the only drawback is that it does not interface with the email system the UCSD libraries currently use. As it turned out the email interface for appointment scheduling was not as important as having the data available to check on academics already contacted and to follow up on notes taken during conversations with the academics.

Conclusion: Lessons Learned

A few key things learned while trying out these different outreach strategies on the students and researchers:

For the undergraduate students, using eye catching and relevant enticements – changing the newspaper ad, including information on parking, and feeding them.

For the graduate students: having a major enticement, like the iPods, definitely helped, but also reminding them frequently by email, and bonding with them at their social events, such as the “Pizza on the Pier” welcome party.

For the faculty and researchers: sending them an email message with the librarian contact information, after the phone conversation, helped to ensure they have the information when they need it, and changing the offer of a class, or instruction, or help – to a “demonstration” of database features and shortcuts was a lot more effective.