

Acquittal report: International Travelling Fellowship 2013

Report for the Council of Australian University Librarians (CAUL)

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In mid-2013, with support from the CAUL International Travelling Fellowship, I spent two weeks learning about the public programs at the British Library in London and the Bodleian Library at Oxford University. I visited exhibitions and participated in tours and events as a member of the public, and met with staff at both libraries to explore ideas in more depth. In particular, our conversations centred on exhibitions and events management, merchandising, and how to evaluate the success of stakeholder engagement activities.

This report will be of interest primarily to curators, collection managers, development managers, events managers, marketing and communication managers, and senior staff of Australian academic libraries.

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Common themes

Several common themes emerged from my discussions with staff at the Bodleian and British libraries.

Both the Bodleian and the British Library increasingly rely on commercial activities and sponsorships to support their public programs. The Bodleian runs daily tours and ticketed events such as theatre productions and Christmas illuminations. The British Library's Late program of festival-style after-dark entertainment has been a profitable crowd-pleaser, and both libraries are continually honing their retail offerings at both the low-cost ephemeral and high-value artisanal ends of the market.

The key marketing messages are slightly different for each institution. The Bodleian's stakeholder events offer exclusivity and privileged access to academic expertise, while the British Library uses various strategies to ensure its events receive publicity and attention in the broader community. These different tactics reflect the different roles of the libraries, one an academic library serving a specific university community and the other a national library serving the interests of the public and the State.

Both the Bodleian and the British Library host large-scale public events with a public profile rarely seen in the activities of Australian academic libraries. The key to successful crowd-pleasing events is in long-term planning -- at least five years ahead, so that there is time to identify innovative opportunities, build a calendar of thematically related events, and develop relationships with corporate sponsors and participants.

Frameworks and standards for evaluating the quality of stakeholder engagement programs are emerging. Each library has its own goals and some basic measures, but these are by no means mature as yet.

Ideas for Australian university libraries

The ideas listed below were inspired by what I saw and experienced as a visitor at the Bodleian, the British Library and several other museums in London and Glasgow. Not all of the ideas will be suitable for a particular university library: we must each select strategies and tactics that fit with our own institutional goals and values.

- Charge a small fee for library tours for the public; enable advance bookings and only run tours when there are sufficient numbers in a group.
- Make creative use of temporary spaces, such as the construction hoardings at the Weston Library where an alphabetical mural tells the stories of iconic items represented in the Bodleian's collections. See: <http://www.bodleian.ox.ac.uk/our-work/estates-projects/weston/images/treasures>
- Consider offering high-quality venues to external clients on a commercial basis, particularly at night and on weekends.

- Employ specialist staff to manage commercial enterprises such as merchandising, venue and events management for external clients.
- Recruit volunteers to host guided tours of libraries and historical venues. These could be students, members of a "friends" group or perhaps retired library or university staff.
- Consider "alt metrics" for evaluating invitation-only events, for example whether the event attracted guests from specific sectors (a measure of reputation in those sectors) or the number of tweets relating to the event.
- Ensure each major exhibition has a program of associated lectures, symposiums, podcasts, discussion forums, musical performances or other events. Sell printed copies of the exhibition catalogue and associated publications, for example the text of a guest lecture.
- Consider employing an education officer to build relationships with local schools and community organisations (via the university's partnerships office, or equivalent). Ensure school groups visiting the university have an opportunity to see the library and perhaps undertake a short workshop or interactive tour based on a current exhibition. The education officer could also design programs for summer school or winter master classes for alumni and other adults, based on the library's special collections or current exhibitions.
- Seek opportunities to link the library's exhibitions and public programs with current affairs and social developments, for example with short lunchtime floor talks or a freely available online subject guide focusing on a topic of current interest and debate.

Overview of issues: Library events and stakeholder relations

The University of Melbourne Library has a stakeholder engagement program that grows in sophistication each year. This growth has been in direct response to feedback in the biennial customer satisfaction survey in which the Library was achieving low scores on communication and awareness of services.

If an academic library aims to improve its relationships with various parts of the campus community, then the "development and enhancement of collaborative activities is part of the library's institutional communication program." (Anderson, 2011)

Accepting this emphasis on collaboration means broadening the traditional definition of marketing activities. In this engagement-focused world, effective communication is "not just a smattering of marketing here and another smattering of marketing there. It is, instead, a disciplined, planned and thorough method by which a library tells its users why using their library is worth their time, money and effort, that is, why their library is valuable..." (Holt, 2007)

The Melbourne University Library is also active in the University's ambitious philanthropic campaign, "Believe," which was launched to the public in 2013.

Exhibitions and related Library events offer unique opportunities to build long-lasting relationships with alumni and potential benefactors.

Like all Australian universities, Melbourne seeks to ensure staff time and financial resources are invested where they will have the greatest benefit. While lending and other Library services are relatively easy to quantify and evaluate, we have not yet established a framework for gauging the success and effectiveness of public programs.

Stakeholder engagement can be defined as a process whereby an organisation develops ongoing relationships with individuals or other organisations to achieve an identified purpose or outcome (Accountability Ltd, 2011). Ideally the relationship should benefit all parties, and the quality of the multi-directional engagement activities should be monitored and evaluated.

As academic libraries formalise their stakeholder engagement programs, they face the challenge of measuring and evaluating efficacy and linking the engagement activities to enhanced organisational outcomes (Bruce and Shelley, 2010). At the University of Technology, Sydney (UTS) the Library has commenced a number of activities aimed at achieving client engagement. Thus far they have only anecdotal evidence of the program's effectiveness (England and Tiffen, 2011). Conversations with peers at other Australian universities indicate that most of us are in a similar position. A consistent framework for evaluating and improving the effectiveness of stakeholder engagement programs has not yet emerged.

The CAUL International Travelling Fellowship provided an opportunity to investigate how two of the United Kingdom's leading libraries are engaging with their stakeholders, and to identify opportunities for Australian academic libraries to improve their practices in this area.

Travel itinerary

The 2013 trip was planned around a two-week itinerary, spending a week each at Oxford University and the British Library.

The schedule also included visits to several other cultural institutions in London and Glasgow. There were no arranged meetings at these other institutions but experiencing their public programs as a member of the public provided insight into their engagement programs.

Detailed observations: Bodleian Library, Oxford University

Oxford University's libraries are among the most celebrated in the world, not only for their incomparable collections of books and manuscripts but for their buildings, some of which have remained in continual use since the Middle Ages.

Libraries in the Bodleian Libraries group include the principal University library—the Bodleian Library—which has been a library of legal deposit for 400 years; major

research libraries; and libraries attached to faculties, departments and other institutions of the University.

First opened to scholars in 1602, the Bodleian Library incorporates an earlier library erected by the University in the fifteenth century to house books donated by Humfrey, Duke of Gloucester. As well as the Library's own public engagement activities, private operators bring tour groups to the Oxford campus several times per day.

The new Weston Library, now being constructed, will include a Visiting Scholars Centre and a rooftop reading room, which will be the service point for non-Western special collections. As well, the design includes a suite of high-quality Reading Rooms for researchers; several seminar rooms for secure hands-on teaching, master classes and public seminars using special collections materials; and a centre for digital scholarship. The new library will have larger, more flexible event and exhibition spaces with easy street access, encouraging visitors to come inside. The improved public access presents challenges for library management which must balance the integrity of a scholarly workspace with the more disruptive activities of commercial tours and casual visitors.

While the Bodleian has a role in exposing the University's unique collections to a broader audience, it also expects external groups to pay for that access to resources.

The Bodleian's Commercial (Enterprise) Services team manages the retail shop, imaging studio, licensing, publishing, and events, tours and filming in historical venues. Commercial Enterprises has 35 FTE staff. The staff profile has shifted; in the team's early years, staff came from a library background; more recently the team has employed specialists with business expertise.

The Commercial Enterprises team brings in over A\$1 million in revenue annually. They are starting to measure outreach activities by categorising events with a view to determining which services to invest in and expand. For example, corporate fee-paying events held in historical venues are likely to see growth in the next several years, rather than internal staff events that could be held elsewhere.

The Bodleian hires out its venues for use by internal and external groups. Groups that may use the historical venues include corporate clients, university departments for hosting a conference or entertaining donors, and private clients for weddings and parties.

For external events, a library staff member meets with the client to determine their requirements. The library arranges logistics and front-of-house services, and allocates 1-3 staff to work at the event. The client selects an approved caterer who knows the venue; the caterer works directly with the client to select flowers, furniture, food etc. At present the library does not receive a fee for the caterer's input.

The Bodleian runs tours seven days per week. Tours must not interfere with the library's core focus on providing a suitable environment for scholarly work. Headphones and microphones have recently been introduced for tour groups to reduce disruptive noise. Around 45 volunteers conduct the tours. One library staff member coordinates the schedule and the volunteer cadre.

For efficient planning, the Bodleian has a list of standard tours and standard variations to the basic itineraries. Tours are scheduled a month in advance, however may change on a daily basis to accommodate ceremonies, exams and other events on campus. Visitors can register for a tour online, or at the gate 24 hours before a tour is scheduled to start. At the conclusion of each tour, tour guides are expected to request feedback via either the Trip Advisor website or on a printed form. (This did not happen on the tours I joined.)

At the end of each year, volunteer guides are thanked at an event hosted by Bodley's Librarian. The format for this event is generally an academic lecture about a facet of the university or a recital, followed by lunch. Bodley's Librarian takes this opportunity to thank their volunteer community and to update them on what is planned for the coming year.

Guest lists for Library events are a mix of stakeholders, potential donors, and "interesting people for them to talk to". The 1400 Friends of the Bodleian generally make up the largest proportion of guests at each exhibition opening. This type of event is usually followed by an exclusive dinner for 40-50 guests with Bodley's Librarian. Guests at sit-down dinners each receive a gift, for example a fine bone-china cup and saucer (screen-printed with the Bodleian image), with a tea sample and a poster of a map from the library's collections. The 40-50 guests are repeatedly invited and, after attending a few such events, are asked to make a gift to the library. The aim is to convert guests to donors within 18 months. All interactions are recorded, and the expense of hosting these events is offset by ongoing donations.

The annual stewardship event is the largest on the Bodleian's development calendar. This event is highly regarded and has been carefully developed and branded over the years, so that stakeholders see it as prestigious and special. Gift agreements are often signed in the days preceding the event, specifically so that they can be announced at this event.

The communications, events, finance, Enterprise Services and development teams work closely together on planning and running stakeholder events. All such events must be justified by tangible impact and outcomes; if the return on investment is negligible, the Library would do better to use the venue for a wedding or other external fee-paying client.

The Bodleian Shop releases a new range of merchandise for each major library exhibition. Exhibition catalogues are available for sale, along with complementary publications based on lectures, symposiums and other activities that accompany the exhibition. The shop has a physical presence on campus and an online store.

The eight-person marketing and communications team at the Bodleian is responsible for marketing the exhibitions and events, press and media relations, social media, library signage and the web. The team manages all Bodleian events including major annual events such as exhibitions, Shakespeare's Globe Theatre on tour, the Lunchtime Lecture Series, the Oxford Literary Festival, the Master Class Program and the Christmas Lights Festival. In the near future, the team is hoping to recruit an Education Officer to develop a range of exhibition-related programs for high-school students.

The Bodleian has three small exhibition spaces (galleries and large display cases), which house temporary displays and one exhibition room in which they host two major exhibitions a year. As well, a large display case contains a permanent exhibition of selected highlights from the university's historical collections. A discreet wall-mounted sensor monitors the display and counts the number of people looking closely at the exhibits.

The major exhibition program has over 100,000 visitors each year. The program for engagement activity focuses mainly around the major exhibition with a series of free talks and lectures offered to the public. Guest speakers are drawn from the arts community as well as University academics.

One lecture series runs 1.00 to 1.30 pm on weekdays, a popular time slot with many repeat guests who are early retirees and members of academic families. Bodleian staff observed that in English winters many people want to be home by late afternoon, not traversing a cold campus to sit in an unheated historical building — no matter how interesting the speaker may be.

Events hosted by Bodley's Librarian are normally free of charge and take the form of an exhibition opening followed by a dinner for invited guests. The aim is to maintain contact with key stakeholders, for example representatives from bodies that award grants, and to reinforce the message that the library is a prestigious institution worthy of support as it constantly strives to share with a wider community the resources under its care. Librarian-hosted events are also an occasion to thank those who have contributed something along the way, in the hope that they will continue to do so. The main measure of success for Librarian-hosted events is measured indirectly by the Library's success in attracting grants and other funding for collection acquisitions.

For Librarian-hosted events, most of the arrangements are made by a single event manager who drafts the guest list, books the caterer, selects the menu, attends to logistics and organises printing of invitations and other stationery such as the menu, place cards etc.

Detailed observations: British Library, St Pancras

The British Library (BL) moved into large, purpose-built spaces in the St Pancras district of inner London in 1997.

All British Library events are overseen by the Head of Events. The events team provides a framework for curators and librarians to host their own events in a manner consistent with the whole-of-Library program. The central events team manages the larger, more complex events, those with over 200 guests, VIPs and/or major donors.

Regardless of who manages an individual event, it must be recorded in a central planning database, to which selected external caterers also have access. The events team reviews the number of guests, location, date and time, format and other aspects of the proposed event. The team supplies the curator/organiser with an "event owner's pack" containing guidelines, checklists, advice on health and safety, ticketing, communications and key contact details. A month before the event, the events team

contacts the organiser to book caterers, arrange building security and access, room set-up, lighting and confirm other details. All information is recorded in the database.

Guest lists for major events are created and managed by the Development Office (not the events team). The press office arranges political engagement as required. A guiding principle is to ensure influential stakeholders have "someone interesting" to talk to at a British Library event; every guest list includes a selection of VIPs and celebrities.

To evaluate public events the British Library use feedback forms, emails and online surveys. Invitation-only events are not evaluated in this way.

The BL hosts two major exhibitions and three smaller shows per year. Large events are planned five years in advance. Significant anniversaries are identified well in advance, so that innovative promotional opportunities are identified early and there is ample time to develop relationships with relevant organisations. The 'blockbuster' events are designed to appeal to many audience groups.

A recent innovation is the "Late at the Library" program where communal spaces in and around the library are used for festival-style public events after dark. Each Late event has a theme related to a concurrent major exhibition -- Vice and Virtue, Party Rules, Fashion Flashback -- and participants are encouraged to dress for the occasion. Food, live music, performance, dance, market stalls and other entertainment are heavily sponsored and tickets cost around £10-15 each.

Smaller events have a shorter timeframe, requiring on average eight months' lead-time if the events team are involved. (Events with a shorter timeframe receive no administrative support from the events team.) These smaller events, often tailored for specific community interests or cultures, provide opportunities to develop new audience groups for the Library.

In addition to the temporary exhibitions, the Sir John Ritblat Gallery hosts a permanent display of 200 of the British Library's greatest treasures: sacred texts, maps, early printing, and literary, historical, scientific and musical works. The library offers guided tours, an online version of the gallery

The British Library's public programs attract far more visitors than readers: 200,000 readers visit on average twice a year; in contrast, 500,000 public visitors come along four times a year for exhibitions, lectures and other events. Almost 2.5 million people enter the Library each year. The Library has a commitment to demonstrating its value to the taxpayer, the public and the Government.

The Learning Program at the British Library reaches over 20,000 school students per year. The program teaches research skills, information literacy and digital literacy to high-school age children. The program is linked to the National Curriculum and offers teacher training as well. Sessions are generally held in the galleries, as logistics there are easier.

The Library has a group of trained workshop leaders, many whom are ex-teachers and artists. The workshop leaders work with curators to develop a session based on the relevant exhibition. The students then have a "facilitated show and tell" with the

workshop leader and the curator. Unless asked a direct question by the students, the curators are not allowed to speak about the exhibition items. This ensures that the children ask questions and that they find out the things they want to know about, rather than what a curator thinks is interesting about an object. The core research skills remain constant, so most schools participate annually with a new cohort of students. The Learning Program's pages are the most visited part of the British Library's website, providing resources for both teachers and students.

The British Library uses 'snapshot' data, collected several times per year, to evaluate its events and public programs. A current project is the development of a Customer Relationship Management (CRM) database. The Library has 114,000 accredited readers, but no ability to match readers' borrowing records with other points of engagement with the Library.

The Library does receive feedback from guests; it is generally positive and tends to be about event logistics, food, security, ambient temperature and so on. After a public event the following 'debrief' data are recorded:

- Number of RSVPs
- Number of guests attending
- Press articles (including social media mentions)
- Web traffic
- Video plays
- Partners/potential partners identified from running this event
- Timeline: what worked and what didn't, did we plan enough in advance and according to workable deadlines
- Review and recommendations on event space, set up, catering, supplies, logistics, formalities
- Notable feedback from attendees/internal staff
- Useful quotes or any events feedback information/survey results
- Summary of post-event activity
- Suggested improvements and amendments for future events

Feedback mechanisms used at the British Library include emailing participants after events asking them to fill in a survey (Google Docs form), roving iPad interviews, and a Google Docs form on a branded iPad plinth at events for guests to fill out on the spot. Paper forms are also still seen as effective but require staff time to enter the data into a database.

The British Library's merchandise range features bespoke, unique, crafted items based on cultural heritage objects. Each exhibition has a supporting range of merchandise serving both promotional and financial purposes. The most popular item is the 10-pence postcards. The Library staff regard these as free advertising -- with a beautiful collection-related image on the front, the obverse of each postcard is printed with standard text promoting the British Library, its location and its public programs.

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Any inaccuracies or omissions in this report are mine.