

# Marketing as an Access Tool for Public Archives: A Case Study — Madeira Regional Archives' Educational Service/Cultural Extension

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**Abstract:** Managing a non-profit or for-profit organization is challenging. All aspects of the organization need to be planned and executed in accordance with a defined competency matrix aligned with comprehensive goals the organization has established. Our experience has shown that effective and efficient management of an archives requires continuous marketing to address tangible and intangible needs across the organization. To address these challenges, the Educational Service/ Extensional Cultural of Madeira Regional Archives has developed a marketing approach to distinguish ourselves from our competitors.

## Introduction

Information units must meet Information Society's emerging needs.<sup>1</sup> Globalization and new technologies stimulate the development of new abilities.<sup>2</sup> These tendencies originate a new type of culture in which individuals are more demanding and sensitive concerning for the quality of a product,<sup>3</sup> a service or even education or life itself. This organizations must attend, in useful time,<sup>3</sup> the needs and demands of the consumers, because it's crucial for their survival.<sup>4</sup> For such an adaptation to take place, it is imperative that information systems be able to employ marketing techniques to identify the different segments in which they function.

On such grounds, the primary objective of archival organizations is to serve the needs of users. This is especially important when the records held by an archives support the rights of citizens. This need for a user oriented perspective leads us to propose the application of marketing techniques in the context of Public Archives, more precisely on Educational Service/Cultural Extension of Madeira Regional Archives<sup>5</sup> (Funchal, Portugal, Europe).

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<sup>1</sup> RIBEIRO, Fernanda – *O perfil profissional do arquivista na sociedade da informação*. [online]. [02/10/2011]: <http://ler.letras.up.pt/uploads/ficheiros/artigo8871.PDF>.

<sup>2</sup> CERDÁ DÍAZ, Júlío Los espacios dela memoria. Claves para aprender desde el archivo. In *Estratégias e modelos para ensinar a usar la información*. [on line]. [20/02/2011]: [http://archivo.ayto-arganda.es/documentos/Claves\\_para\\_aprender\\_desde\\_el\\_archivo.pdf](http://archivo.ayto-arganda.es/documentos/Claves_para_aprender_desde_el_archivo.pdf). The some is refered by José A. MOREIRO GONZÁLEZ nas IX Jornadas de Gestión de la Información: «Nuevos perfiles profesionales y formación de documentalistas que trabajan en servicios de información». MOREIRO GONZÁLEZ, José A. – Nuevos perfiles profesionales y formación de documentalistas que trabajan en servicios de información. In *Actas de las IX Jornadas de Gestión de la Información*: Biblioteca Nacional, Madrid, 2007. [online]. [09/06/2011]: [http://www.sedic.es/IX-Jornadas\\_Jose-Antonio-Moreiro.pdf](http://www.sedic.es/IX-Jornadas_Jose-Antonio-Moreiro.pdf)

<sup>3</sup> KOTLER, Philip e KELLER, Kevin – *Administração de marketing*. Pearson Prentice Hall: São Paulo, 2006. ISBN: 85-7605-001-3.p.18.

<sup>4</sup> CRUZ MUNDET, José Ramón – *Pasado y futuro de la profesión de archivero*. [online]. [10/10/2011]: <http://eprints.rclis.org/2356/1/A12-02.pdf>.

<sup>5</sup> The mission of Madeira Regional Archives is to preserve and conserve the collective documental memory of Madeira, since the fifteenth century until today. To know more about our historical public archive, explore the website: [www.arquivo-madeira.org](http://www.arquivo-madeira.org).

We have also other motivations: my personal experience as an archivist presently directing Madeira Regional Archives' Educational Service/Cultural Extension, with all the daily contact with a broad variety of groups, and personal and organizational engagement in increasing quality of service, has driven me in particular towards this case study. Furthermore, Madeira Regional Archives' (ARM) educational project is apparently unique and original in Portugal, and this has made the completion of this study a sort of adventure since its beginning.

### **The Project's Starting Point: How to Begin?**

Considered in an inclusive society<sup>6</sup> and the 4 pillars of education: learn to learn; learn to do; learn to share; learn to be<sup>7</sup> — but also ARM's potential to contribute to non-formal education, also known as “lifelong education”, associated to the construction of Madeira Regional Archives' new building and facilities installation in 2004, give us the opportunity to create a new service: the Educational Services/Cultural Extension (ES/CE).



**Figure 1. The old and the new building of ARM.**

<sup>6</sup> *Livro Verde para a Sociedade da Informação*. [online]. [20/08/2011]: <http://www.pose.mctes.pt/documentos/pdf/LivroVerde.pdf>.

<sup>7</sup> MUFTI, In'am Al; CARNEIRO, Roberto and others - *Learning: the treasure within*. UNESCO Publications. p. 20-22.

The change of our image was just to start! But how to begin, were our first doubt. Without any experience in educational and cultural activities, we made bibliographical and web research; received several trainings; visited educational and cultural extension departments in other public archives (municipal and district archives), libraries and museums in Portugal mainland.<sup>8</sup>

### **The Project's Development: What Do We Want to Do?**

The purpose of the project was to characterize the micro and macro environment of ARM's. By micro marketing, we meant define the team work: two archivists, Sofia Santos (leader or head of the Service) and Regina Oliveira, an Arts teacher, Marcela Costa, a journalist, Natércia Gouveia, and a web designer, Pedro Clode.<sup>9</sup> The analysis of macro environment allowed characterized the principal external clients of Regional Archive. They are scientific researchers, few university students', «clientele citizen»<sup>10</sup> - concerns to the society that only consult the documentation for legal or administrative reasons, some curious people.

The project developers also noted:

- a lack of another cultural or educational activities in local archives (Archipelago of Madeira);
- that studying the good practices of the educational services of the regional museums and libraries,<sup>11</sup> allowed us to identify their targets: pre-school, primary and elementary schools. This practice clearly expressed a general gap—secondary and universities students—were completely forgotten. Therefore, and taking into account that the courses of Social Sciences have few students at the University of Madeira (UMa), and also thinking on the contribute to an increased the number of stakeholders in this area, was established that this would be our audience/ segmentation.

At this stage or time, to distinguish our service from others and to impose its image on the market, our web designer creates a logo<sup>12</sup> (Aprendiz de Arquivo – Apprentice of Archive<sup>13</sup>) for the Educational Department and information products. (See Figures 2 and 3.)

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<sup>8</sup> We visited Foundation Calouste Gulbenkian; Nacional Library of Portugal; Serralves Museum; City Hall Archives of Penafiel and Oporto; and Distrital Archives of Viseu and Oporto.

<sup>9</sup> In September of 2008 the teams have two more employees: Constantino Teles, teacher of Physical Education, and Gabriela Queiroz, History Teacher. In 2009, these colleagues were substituted by João Martins and Fátima Abreu, both graduates in History.

<sup>10</sup> ERMISSE, Gérard – L'étude sur les publics des Archives de France. In *Proceedings of the XXXVIth Conference of the Round Table on Archives (CITRA)*. Editora ICA: Paris. 2002, ISSN: 1680 – 1895. p. 67–73.

<sup>11</sup> In Madeira, were made visits to Museum Frederico de Freitas; Museum of Artes Sacra; Núcleo Museológico do Açúcar, among others.

<sup>12</sup> Our apprentice was registe in March of 2005, with the number 391032, because in Portugal, the logos to have value legal in the market need to be registered on *Instituto Nacional de Propriedade Industrial*. [Decreto-lei n.º 143/2008, de 25 de Julho](#), Diário da República n.º 143/ 2008 – I Série, do Ministério da Justiça. It should be original, understandable, easy to memorize and with a language appropriate and identified with the institution in order to promote the sale of products and services. MARCA FRANCÈS, Guillem – Marcas y patrimonio cultural: tangibilización de la comunicación. In *La comunicación global del patrimonio cultural*. Ediciones Trea S. L.: Gijón, 2008. ISBN: 978-84-9704-374-8. p.162.

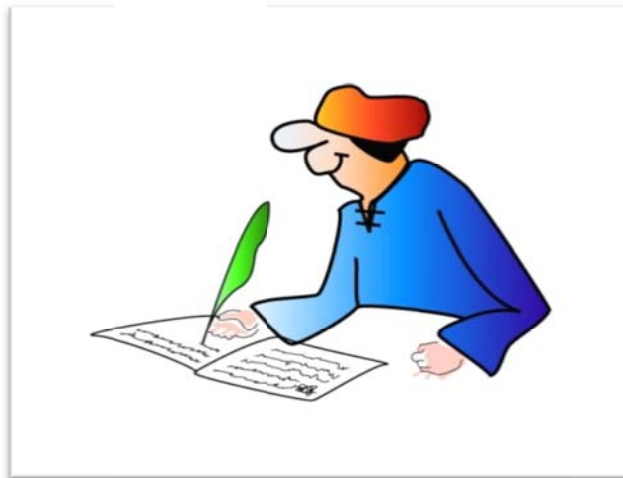


Figure 2. The logo of Educational Service: *Aprendiz de Arquivo*.



Figure 3. Example of some information products (flyer and bookmark).

### Marketing Strategic Plan: How to Develop Projects?

In December of 2007 the Regional Archive was considered an enterprise with the Quality Management System (ISO 9001/2002). The guidelines of the implementation of these rules were:

<sup>13</sup> The *Aprendiz*, with happy and bright colours, tries to represent all the community learning about this *House of Culture*.

1. to be a cultural institution recognized by the society and that serves its citizens' collective identity (democratize the accessibility to historical records);
2. to help and assist the qualification of the Regional Public Administration by providing support to governmental and private agencies, assuring the accessibility and preservation of its archival records (efficiency, simplicity and practical means to offer effective and fast response to its customers);
3. to be mentioned and seen as a reference by the archive professionals through its practices of excellence (commitment to achieve efficient internal and external relationships/ sharing knowledge).<sup>14</sup>

In this context, the ES/CE defines their general procedures as:

- operational goals linked with precise measuring indicators;
- detailing and planning the product/service conception and
- development, identifying goals (inputs and outputs) and needed resources.

To achieve these objectives, internal marketing was developed, a program that required regular meetings with the ES team to review and revise the pedagogical or cultural products as needed.

After field work, the ES activities are submitted to a satisfaction inquiry. Subsequently, the result of this instrument is treated to identify the most positive or weaknesses aspects. At the end of cultural and education activities, it is most important to do a new meeting in which we will discuss the results, manager difficulties; and find solutions to overcome the identified problems. However, these meetings are not only to debate about the work developed but also to give suggestions of improvement and to the work done by the students.

### **Marketing Mix: How Is This Characterized?**

Products—which educational and cultural activities do we have to offer?

All educational and cultural products of the ES/EC of the ARM's have in common:

- the design, reflecting the age of the public/target;
- the language used for exhibition's, editions (dossiers, catalogues newspapers), and formatives products, reflecting the age and the level of the targets segmentation of the groups.

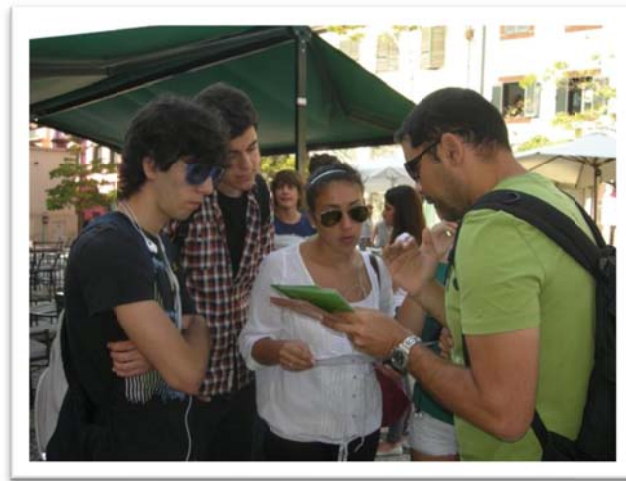
Why? Because we want open the ARM to the general community, maintain and attract external clients/ users, and answer their needs on time; encourage the formulation and implementation of new responses to the most pressing social needs, in a logic of inclusion, social justice and promote the development of a culture of civic responsibility and civic solidarity through formal education and lifelong learning.

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<sup>14</sup> Missão, Visão e Política da Qualidade - Manual da qualidade do Arquivo Regional da Madeira. ARM: Funchal, 2007.p.8. Today we use the Quality System ISO 9000:2008.

The products that we sell are the following:

- regular activities aimed to introduce the ARM and our work;
- regular activities aimed to explore the archives and enrich the knowledge of regional//local history;
- activities and projects aimed for different addresses;
- occasional activities: exhibitions, contest, workshops, conferences and guided tours to specific groups;
- other functions: shop and conference room management; site and Intranet and reception for new workers and helpers.



**Figure 4. Practical activities in ARM, schools and streets.**



**Figure 5. The pedagogical kit about History Tree.**

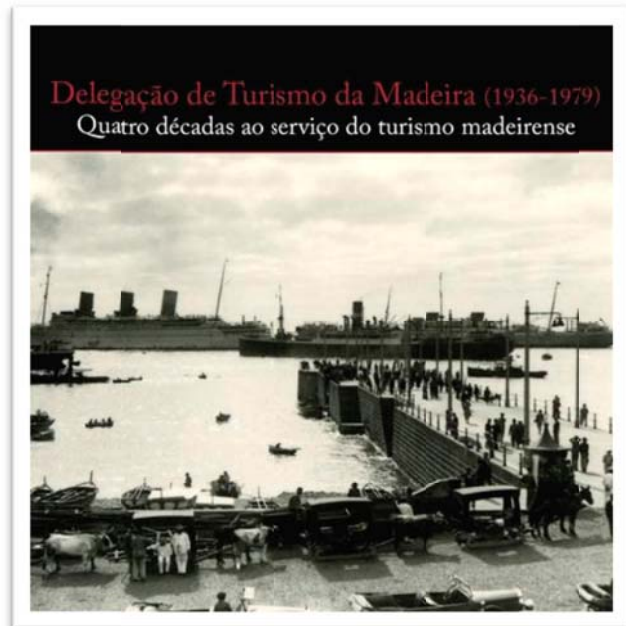
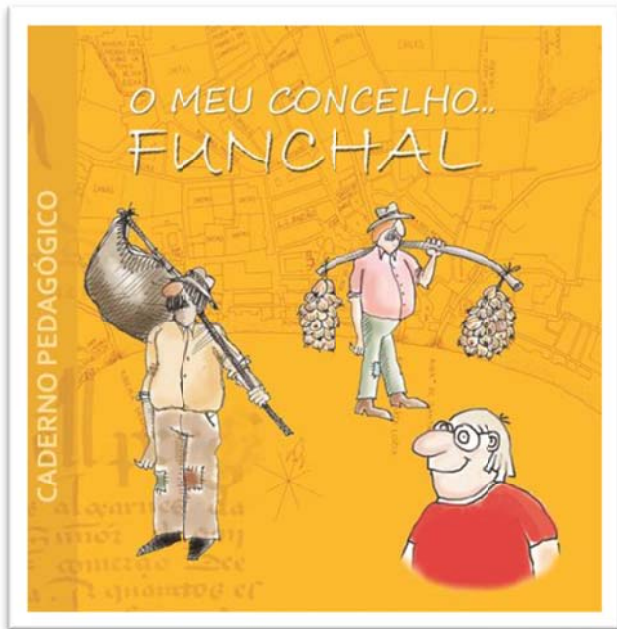


Figure 6. Some editions of cultural extension.



## Price: How Much Time Was Spent in the Preparation of the Activities?

The price in units information is obtained through the services provided to the consumer / user. In the specific case of archives, the price can be derived from the provision of a public service, such as issuing certificates. However, Bob USHERWOOD writes that these publics « organizations should not practice this element because they depend from the public budget, so they should be free for everyone.<sup>15</sup> For Jean-Michel Salaun this P 'can be replaced by the term 'contract ', because these services apply the «prix psychologique», which is the same as saying « (...) la valeur marchande le client that accord à l'usage du produit Thurs et n'a souvent q 'un report lointaine coûts avec les de production et de commercialization.» He also says that libraries and documentation centers provide the company «propriété intellectuelle»,<sup>16</sup> it becomes difficult to assess or establish a price, even more for something that people are already used to enjoy for free.

For the British Eilenn SAEZ the price in Information Systems does not necessarily imply monetary value. The implementation of these services can mean time spent on material and human resources to meet the demands / needs of its customers.<sup>17</sup>

In our case study the price can be represented as following:

### Qualitative price –

- a) Time spent in the market study in order to know the material needs as well as to obtain information on educational and cultural aspects;
- b) Time spent researching bibliographic and documental data;
- c) Time spent preparing the educational activities and its execution;
- d) Time spent getting in touch with schools and other similar establishments as well as in executing the educational/cultural activities;
- e) Time spent in the products' creation and validation;
- f) Human resources used in: archive treatment ; conservation and restoration, educational/cultural services and reference services;
- g) Time to update the ARM site and Facebook page;
- h) Time spent writing press releases;
- i) Time between the period a press note is written and the time it reaches the mass media;
- j) Time preparing the conference room.

### Quantitative price–

- a) Price of the conference room's fee;
- b) Price paid to workshops addressed to the external audience/public and also to the internal public.

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<sup>15</sup> USHERWOOD, Bob – *A biblioteca pública como conhecimento público*. Editora : Editorial Caminho, Lisboa, 1989. ISBN: 972-21-1284-8. p. 81-91

<sup>16</sup> SALAÛN, Jean-Michel – *Marketing dès bibliothèques et dès centres de documentation*. Éditiones du Cercle de La Libraire: Paris, 1992. ISBN: 2-7654-0507-7.p.114-115.

<sup>17</sup> SÀEZ, Eilenn Eliot – *Marketing concepts for librarians and information services*. Facet Publishing: London, 2002. ISBN: 1-85604-426-2.p.67.

### **Distribution – Where Do ARM Users/Clients Search For Its Product/Service?**

The distribution is related to the channels for achieve more easily and faster to the external customer. In other words we have:

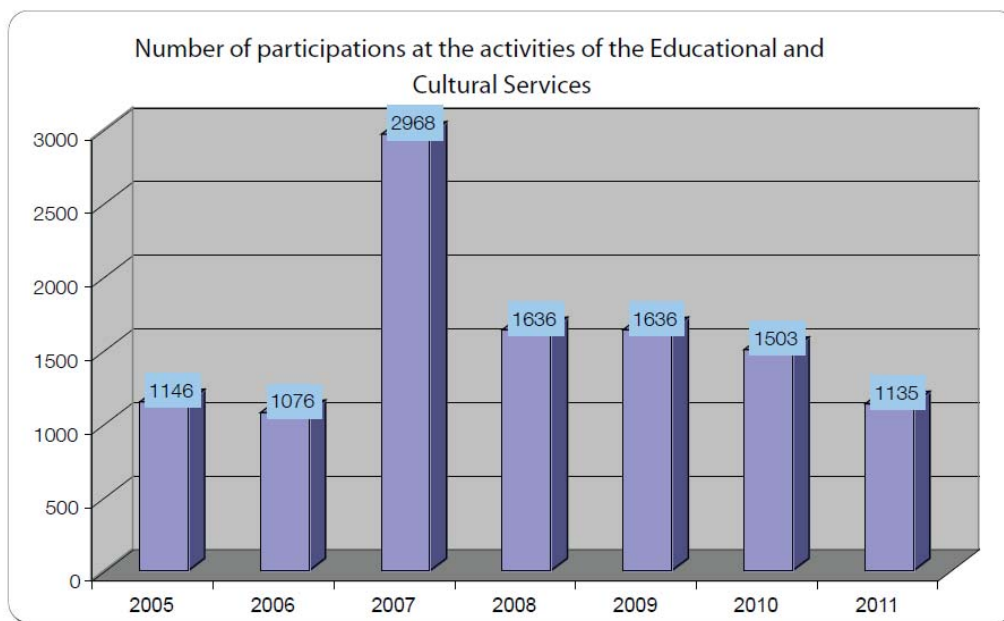
- ARM site – [www.arquivo-madeira.org](http://www.arquivo-madeira.org);
- ARM digital – [armdigital.arquivo-madeira.org/armdigital/](http://armdigital.arquivo-madeira.org/armdigital/);
- e-mail; telephone and fax;
- building location and its accessibility;
- web 2.0: [www.facebook.com/pages/Arquivo-Regional-da-Madeira/190882517596335](https://www.facebook.com/pages/Arquivo-Regional-da-Madeira/190882517596335) ;
- direct marketing (we create the products, and then we meet the teachers to show our product. After that, if they approved our ideas they sign a pedagogical compromise).

### **Promotion: How Does ARM Market Its Products?**

Promotion is most used by information units. In Education Service/Cultural Extension, all products that we referred are communicated by:

- press releases sent to local mass media;
- invitation to all ARM listed entities;
- direct invitations to Madeira's teaching establishments;
- website
- newsletters
- Facebook
- posters and postcards
- buzzmarketing (passing information by person-to-person who are already loyal)
- activity files
- press files

## A Project Affirmation



**Figure 8. The number of users of Educational Service/ Cultural Extension from March 2005 until June 2011.**

The success of Education Service/Cultural Extension of Madeira Regional Archives depends on the employment of work techniques, lately improved by the introduction of the Quality Management System and by the creation of instruments that are different due to its contents, graphical image and the way by which they are communicated. Having always the needs of the market in their minds, is through satisfaction inquires, monthly meetings, evaluation of the worksheets sent by students and through the direct contact with our clients/audience/community, that we can answer their expectative with advancement. As an example: the opening of the technical department to the general public three times per year, named “Open Day to the Community”; the introduction of the pedagogical kit devoted to the Family’s History; the teacher’s formation in order to inform them of the tools and knowledge needed to select archive documents and increase the usage of activities and educational tools made by the ES.

It’s a continuous work perfecting and renewing, there is much to do in order to reach new uses/clients and thus influence the educational community and society to the importance of the research and investigation from primary sources. There is one certainty, however, the number of people who already know our collection, services and even our occupation is already considerable. This number has been growing, namely teachers and, apart from that, our loyal public/users spread not only this service but also the ARM’s (Figure 8).

## Resources

[www.arquivo-madeira.org](http://www.arquivo-madeira.org)

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KOTLER, Philip e KELLER, Kevin – *Administração de marketing*. Pearson Prentice Hall: São Paulo, 2006. ISBN: 85-7605-001-3.p.18.

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