



The CHARLESTON REPORT

Business Insights into the Library Market

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Short Takes

The School of Information and Library Science of the University of North Carolina at Chapel Hill will introduce a new bachelor's degree in information science (BSIS) beginning in the fall of 2002. The new major builds on the success of the school's highly popular undergraduate minor in information science, which was introduced in 1997. The BSIS will consist of 10 courses (30 credit hours), including core courses on retrieving and evaluating information. News Release, SILS, UNC-Chapel Hill.

President Bush's fiscal year 2003 budget, released on February 4, includes \$210.7 million for the Institute of Museum and Library Services. Of that amount, \$181.7 million is earmarked for libraries, \$13 million more than FY2002. The IMLS budget also includes the \$10 million fund proposed by Laura Bush to be earmarked for recruitment and training of new library professionals. *American Libraries*, March 2002.

In 2001, for the first time, the U.S. population spent more cash on DVDs than on VHS tapes, \$4.6 billion vs. \$3.8 billion. The total spent buying and renting movies on both DVD and VHS totaled \$16.8 billion, slightly more than was spent on books and easily twice what was spent on video games. *Tribune Business News*, January 10, 2002.

SPARC (the Scholarly Publishing and Academic Resources Coalition) is offering a step-by-step guide to electronic publishing ventures, including digital repositories and journals. SPARC officials say their handbook, entitled "Gaining Independence: A Manual for Planning the Launch of a Non-Profit Electronic Publishing Venture," is a detailed tool to help universities, libraries, nonprofit societies, and others conceive, plan, and implement alternatives to commercially published scholarly and scientific information. The guide includes detailed advice and instructions for creating a business plan and is available on the Web free of charge at <http://www.arl.org/sparc/GI>.

e-Journal Pricing Trends

by William Achauer, Publisher Marketing Manager, and Yvonne Campfens, Director of Publisher Relations & Marketing, Swets Blackwell.

The 2002 Swets Blackwell e-journal survey results represent Swets Blackwell's fourth consecutive study of STM publishers' e-pricing and access conditions. Our survey continues to serve as a yardstick to measure industry developments with respect to publishers' approaches toward e-pricing and access-related issues. It is not meant to be an exhaustive scientific analysis.

Our survey results are based on feedback from several more publishers than in previous years: 50 publishers (both large and small) based in the US, Canada, UK, Europe and Australia participated. The survey's emphasis is on Web-based full text journals (frequently the electronic versions of existing peer-reviewed scholarly print journals). The 7 core topics in the survey were selected from the vantage point of a subscription agent involved in handling a variety of electronic and print titles.

Our initial survey results (1999) clearly indicated a range of pricing policies publishers were using with regard to electronic journals. The 2000 results gave us cause to report that publishers of e-journals might steadily be moving towards more uniformity in terms of their pricing policies. Last year's survey results gave us even more evidence to report this. This year's survey results indicate a definite continuity in some trends witnessed in previous surveys; however, in some areas very little change was detected and even a few slight decreases from previous increase trends over an annual basis appeared.

In some areas we witnessed continued increases:

Publishers offering combined electronic and print pricing	Publishers offering a pay-per-view option
1999: 62%	1999: 37%
2000: 70%	2000: 50%
2001: 73%	2001: 72%
2002: 80%	2002: 82%

In some areas little change was detected over previous surveys:

Percentage of publishers offering electronic access to content after cancellation	Publishers having a consortia and multi-site policy
1999: 60%	2001: 66.6%
2000: 80%	2002: 67.3%
2001: 84%	
2002: 82%	

This year's results also yield evidence that publishers may be open to exploring further options in terms of their pricing policies. In last year's results, only 15% of publishers surveyed indicated that their pricing policies had changed from 2000. This year 35% indicated that their pricing policies had changed from 2001.

This year's survey also included some additional analysis about journal pricing and e-access conducted using our own data. These internal figures provide a wealth of information to further support the findings in our survey. In some cases, similarities between survey results and the feedback that Swets Blackwell has received from publishers is noted.

Note: Swets Blackwell is offering the 2002 full report for sale to any interested publisher or other party. Orders can be placed by email to wachauer@nl.swetsblackwell.com. Full text of the 2001 survey is available as a PDF at www.iucr.org/~ps/survey.pdf.

Libraries on the Move

Oxford University's Bodleian Library will celebrate its 400-year anniversary this year, marking the occasion with a conference to be held in September. The library was formally opened on November 8, 1602, and is named for Sir Robert Bodley, a scholar and diplomat. The library's collection numbers more than seven million volumes which are housed in many buildings across the campus. For more information about the September conference, and to register, visit www.bodleian.ox.ac.uk/2002conf.

National Library Week is April 14-20, 2002, in the United States. ALA's @ your library campaign is marking the week with the launch of a national new initiative called "Rediscover America @ your library," featuring programs designed to showcase the essential role of libraries and librarians to democracy. The campaign is targeted to policymakers and the general public with a message that libraries and librarians are needed now, more than ever. The theme will also be the focus of ALA's Annual Conference in Atlanta in June. For more information, logon to www.ala.org/atyourlibrary/.

The Cerritos Public Library (California) opened its "Experience Library" on March 2. The library is a \$40 million, 82,500 square foot facility that features multimedia learning sites. The book collection has also been expanded to 300,000, an increase of 50%. InfoStations were created throughout the library to provide assistance; reference librarians with wireless headsets and handheld computers can provide service away from traditional desks. *Library Journal*, March 1, 2002.

The University of Virginia has received a \$1 million grant from the Andrew W. Mellon Foundation to support ongoing digital library research and development. The funds will be used in collaboration with Cornell University's Digital Library Research Group to further a working prototype of a digital repository system (called FEDORA) that the two groups have been creating since the summer of 1999. UVA has been active in building digital collections since 1992 and is host to the popular Electronic Text Center. For more information on the grant and the FEDORA project, logon to www.lib.virginia.edu/dlbackstage/specprojx_fedora.html.

Check It Out!

The Michigan Library Consortium in Lansing is providing a newly updated Website featuring links to academic copyright policies on the Web. This site is an excellent source for any library, vendor or publisher dealing with licensing and other copyright issues. Check it out at <http://mlcnet.org/services/copylinks.php>.

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The Charleston Report is written for publishers, vendors, product developers, merchandisers, and wholesalers who are interested in expanding their library market. Readers will gain insights in effective marketing to libraries, early alerts to library trends, access to library leaders' future plans, library budget projections, library strategic plans, technology directions, and publications needs.

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By the Numbers

\$24.2 billion...is the total of private contributions to U.S. colleges and universities for the 2000/2001 academic year, an increase of about \$1 billion over the previous year and a new record. *The Chronicle of Higher Education*. <http://chronicle.com/daily/2002/03/2002032503n.htm>.

54%...of the U.S. population now uses the Web, according to a recent Commerce Department report. The total number of users is 143 million, an increase of 26% over a year earlier. Email remains the most popular service, with 45% of the population using it regularly, up from 35% in 2001. *Wall Street Journal*, February 4, 2002.

500...sessions of curriculum-integrated information literacy instruction are offered each year to more than 8,000 undergraduate and graduate students at the University of Louisville in Kentucky. *ALA Cognotes*, January 20, 2002.

35%...of Ohioans polled in June 2000 chose the Internet first when looking for answers to a question, versus 12% who chose the public library. This result marks a change from answers to the same questions given in December of 1988 when 25% of respondents chose the library first and 23% chose the Internet. *American Libraries*, March 2002.

72...questions per day were answered in the month of June 2001 by the KnowItNow virtual reference service of the CLEVENET Library Consortium in northeast Ohio. The number fell to 38 per day in October. *Library Journal*, December 2001.

180,000...Palm formatted e-books were sold during 2001 by Palm Digital Media (PDM), an increase of 40% from 2000. Books are available for purchase and download at www.palm.com/ebooks. 3,500 titles from major publishing houses are offered. *Library Hotline*, January 14, 2002.

64%...of Elsevier Science subscribers now use its ScienceDirect online service, which is being supported by 100 sales representatives working globally. Elsevier is reportedly much less reliant on third party sales efforts than previously. *Publishers Weekly*, December 17, 2001.

£984 million...was the revenue generated by Europe's online information market in 2001, representing the sale of paid-for content. The sector grew by 6% in 2001, surpassing its 4% growth in 2000, according to a new report commissioned by Learned Information Europe, organizers of Online Information. To learn more about the full report, logon to www.learned.co.uk/report.

0.1%...was the increase in 2001 for trade, professional, and mass market book sales over 2000, a total of \$25.36 billion, according to preliminary estimates from the Association of American Publishers. Education was one of the few bright spots, as sales in the school division followed up a 13.3% gain in 2000 with a 7.8% sales increase to \$4.18 billion in 2001. Sales in the college segment rose 7.2% to \$3.47 billion, and sales of standardized tests increased 6.8 percent to \$250.1 million. *PW NewsLine*, <http://article.publishersweekly.com/UM/T.ASP?A12.104.795.3.1560656351>.

Hot Topics from PLA *by Katina Strauch and Linda Crismond, Founders, The Charleston Report*

The 9th Public Library Association conference was held in Phoenix, Arizona, from March 13 – 16, 2002. Over 7,500 people attended and traffic in the nearly 700 exhibits was brisk. Though there was much talk of budgetary woes, the mood was optimistic. The program was divided into eleven educational program categories: buildings for the future, collection management, community connections, customer service, running the library, serving adults, serving children, serving teens, staff development, targeted service, and technology trends.

Here is what many librarians were talking about:

- **Outcome-based evaluation of the public library.** This program was organized by Nancy M. Laskowski of The Free Library of Philadelphia. Data collection (much by Palm Pilot) involved actual observed in-library use. Major outcomes found that 75% of those in the library read for pleasure, 56% learned more about a personal interest, 46% found information for school, work, or a group, and 42% obtained a fact or document. To learn more about this program or to view the handouts, visit www.lrs.org and www.pla.org/conference/conf02/prelimindex.html.

- **Dealing with funding agencies and keeping on their radar screen in light of the need for increased security.** The program “Listening to Power” was jam-packed. Moderated by Joey Rodger of the Urban Libraries Council, it included Toni Garvey of the Phoenix Public Library interviewing Phoenix City Councilman Greg Stanton about how libraries stack up in the broad arena of effectiveness in the city structure.

- **Mentoring the next generation.** Joanne Hazelen of Chicago Public Library helped a full house understand how some of us are preparing for the retirement of the baby boomer generation.

- **Planning for dynamic programming for all types of library users.** Programs for getting various types of library users into the library abounded, including ideas focusing on teenagers and getting them into the library, staffing teen rooms, and having programs of interest to these young library users. Related programs were also held regarding children and elderly adults.

- **Weeding of the adult book collection** (fiction and non-fiction). Numerous sessions were devoted to weeding— what to keep and what to get rid of— as many libraries, cramped for space, are discarding out-of-date or superseded material

- **Looking for future collaboration.** “Lessons Learned from the Bill and Melinda Gates Foundation U.S. Library Program” was included in one program organized by Carol Erickson of the Foundation. Also, “Imaging Our Treasures,” showcasing three public library digitization projects supported by IMLS LSTA funds was organized by Barbara Smith of the IMLS. These programs and others showed some of the new directions public libraries are taking to ensure that their services are relevant to their communities.

- **Focusing on the planning process.** PLA’s five-year planning document (www.pla.org/organization/stratplan.html) was under much discussion. Among the concerns expressed was how to select areas for new services and whether the planning process is flexible enough to accommodate “cutting edge” trends.

Other topics highlighted at the conference included:

- Adult programming in libraries
- Family literacy involving teen parents and quality children’s literature
- Digital reference
- Creating effective team management
- Safety issues in libraries
- The library’s contribution to its community

The hallway buzz included managing budget cuts, recruiting younger professionals, leadership development, integration of technology-based services, and the building and staffing of new libraries.

PLA’s Tenth National Conference and Sixtieth Anniversary Celebration, “PLA 2004,” will be held February 24-28, 2004, in Seattle, Washington.

How About It?

Increasingly libraries in both public and academic settings are serving their diverse ethnic clienteles with specially targeted programs. At the recent ALA Midwinter conference in New Orleans, three librarians reported on their efforts to reach users with different programs which take into account the gender, age, race, ethnicity, physical challenges, and sexual orientation of their library users. One major library, Queens Borough Public in New York, now uses a professional demographer and other experts to help plan specific cultural programs for its branches. *ALA Cognotes*, January 2002.

Did You Know?

NovelList, the popular reader’s advisory tool from EBSCO, now provides access to over 100,000 fiction titles for readers of all ages. Also included are over 73,000 full-text book reviews. The service also offers “Book Discussion Guides” with 3-5 new guides each month, as well as “Bibliographies” on key fiction topics and “BookTalks” for children’s and young adult novels—all designed for libraries to print and distribute to library users or to post on bulletin boards or displays.

Mark Your Calendars

The Charleston Conference will be held from October 31 – November 2, 2002. Preconference sessions and **The Charleston Advisor Vendor Showcase** are set for October 30. Registration packets for the **Vendor Showcase** are being mailed to all previous exhibitors. If you have never exhibited and are interested, send an email with your name, address and email to <rlenzini@charlestonco.com>.

The OCLC Institute is bringing together librarians, experts, and practitioners to share insight and best practices on information standards including OASIS, Dublin Core, ONIX, EAD, and others. To register for the May 29 teleconference at 12:00pm EST or for downlink information, visit www.oclc.org/institute/events/sbs.htm.

Best States for Small Business

The Small Business Survival Committee (SBSC) has released its annual scorecard which rates how members of Congress voted during 2001 on key small business issues. SBSC also has ranked the states according to the average scores achieved by the members of their respective congressional delegations. SBSC is a nonpartisan, nonprofit small business advocacy group with more than 70,000 members across the U.S. Their Scorecard can be downloaded from www.sbsc.org.

Top 5 States

Idaho
Alaska
Kentucky (tie)
New Hampshire (tie)
Oklahoma

Worst 5 States

Vermont
Rhode Island
Hawaii
North Dakota
Massachusetts

TCR Quotes

"It turns out that ink on paper, with glued bindings, is a pretty effective delivery technique,"

Daniel O'Brien, senior analyst at Forrester Research Inc. in Cambridge, Massachusetts, in a comment relating to the failure of e-books to generate mass appeal. *Wall Street Journal*, March 5, 2002.

In the News

Dialog has announced that it is now able to link directly to the full text of over 8,000 scientific, medical, and technical e-Journals published by more than 40 leading scientific publishers and information aggregators including EBSCO Online, Wiley, ScienceDirect, SwetsNet, and Information Quest. Twenty Dialog files now include linking features; users must have subscriptions to the journals they wish to access. However, the linking feature is offered free of charge by Dialog. For more information, logon to www.dialog.com/info/corporate/pressroom/archive_2002/ejournals_link_021202.shtml.

Public Library Budgets Rise

A surprising report from *Library Journal* shows that, despite widespread concern about the impact of economic woes on library budgets, 355 public libraries surveyed showed actual budget increases for both salaries and materials. An excerpt of their findings follows.

Population Served	FY2002 Materials Budget	% change from 2001
Average	\$ 864,000	+ 3.1%
Under 10,000	\$ 32,000	- 3.0%
25,000 – 49,999	\$ 224,000	+ 1.8%
50,000 – 99,999	\$ 385,000	+ 5.5%
100,000 – 499,999	\$ 868,000	+ 2.36%
500,000 – 999,999	\$4,235,000	+ 5.6%
> 1 million	\$7,602,000	+ 1.7%

The full report is available at <http://libraryjournal.reviewsnews.com/index.asp?layout=articleArchive&articleid=CA188739>.

John Cotton Dana Award Winners

Sponsored since 1946 by The H.W. Wilson Company and the Library Administration and Management Association (a division of the ALA), the John Cotton Dana Awards are presented annually in recognition of innovation and ingenuity in library public relations. Award-winners also receive a \$2,500 development grant from The H.W. Wilson Foundation.

This year's winners:

- Baltimore County (MD) Public Library, for its innovative program "Baby Boosters," promoting the library as an important resource for parents and caregivers of preschoolers. The program used volunteers, colorful posters and a dynamic Web page to attract its target audience.
- Bowling Green (KY) Public Library, for a campaign to turn a historic railroad depot into a branch library, featuring a technology hub and an early childhood center. The focus is on services to young children, parents, and caregivers.
- Calgary Public Library (Alberta, Canada), for its television campaign "Rediscover Your Calgary Library." Vibrant spots highlighting library resources stressed the value and convenience of library services.
- Maryland State Department of Education, Division of Library Development Services, for the campaign "It's Never Too Early." This statewide initiative promotes reading by connecting parents and caregivers of preschool children with local public library services.
- New York Public Library, for "Where the Performing Arts Live." This plan raised the curtain on a \$37 million/three year renovation project for one of the city's most valuable resources - The New York Public Library's performing arts collections.
- North Suburban Library System, (Wheeling, IL), for "What's New in Libraries?" a public awareness campaign for the 21st Century. The project used print ads, cable TV, and the Internet to inform the public about programs available at today's libraries.

For more information visit www.hwwilson.com/jcdawards/nw_jcd.htm.

Don't Miss This!

The National Center for Educational Statistics (NCES), a division of the U.S. Department of Education, has issued a new report providing summary data about public libraries in the U.S. for the fiscal year 1999. Data included covers circulation, library visits, reference transactions, interlibrary loans, children's program attendance, public service hours, Internet access, staff, and income, expenditures. To access the report as a PDF, logon to http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid_2002308.

Coming in Future Issues

- Article Linking: Profiling the Players
- The Coming Shortage of Library Professionals
- Trends in Online Public Access Catalogs
- Charleston Conference Preview