



The CHARLESTON REPORT

Business Insights into the Library Market

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Short Takes: Industry News

Sirsi is adding book reviews to its iBistro OPAC offering thanks to a partnership with H.W. Wilson that makes available Wilson's *Book Review Digest*. The *Digest* includes excerpts and abstracts from a number of sources, including the *New York Times Book Reviews*, *Harper's*, the *New Yorker*, *People*, the *Chicago Tribune*, the *New Republic*, and the *San Francisco Chronicle*. For more information, visit www.sirsi.com.

Adobe has released Content Server 3.0, described as an end-to-end software solution that enables the secure distribution of PDF-based eBooks. Among Adobe's partners are ebrary (whose CEO is the son of Adobe's founder), Baker & Taylor, Follett and others. According to library sources, the server can be licensed for \$5,000 for a single site capable of holding 250 titles, available for downloading to a compatible e-Book reader. For more information, check out <http://librarydemo.adobe.com/library>.

Kluwer Online is now offering online access to 450 books through its Institutional e-Book program. The titles are primarily in biomedicine, chemistry, computer science, physical sciences, materials science, and the social sciences. Books can be downloaded in Adobe Acrobat e-Book format. Licenses are available for unlimited concurrent users, with 14-day loan periods using secure gateways. To learn more, logon to www.kluweronline.com.

OCLC has sold the assets of MetaText, a provider of digital textbooks for college and university courses, to XanEdu, a division of ProQuest Information & Learning. OCLC acquired the assets of MetaText when it purchased netLibrary assets in January. XanEdu publishes online and offline course material for the higher education market, including large collections of scholarly journals, periodicals, newspapers, books, dissertations, primary literature works, and academic collections thanks to its parent ProQuest. *LJ Academic News Wire*, August 15, 2002.

Sage Publications' content, removed in July 2002 from EBSCO databases, is back on EBSCO's Academic Search Elite until the end of the year. Sage has announced that it will also "implement what we feel is a more practical solution of replacing Sage journals with journals of appropriate quality in the databases in 2003." **Ed Note:** Watch for *The Charleston Advisor's* upcoming interview with Blaise Simqu of Sage Publications in its January 2003 issue (v.4, no.3).

The 2002 Charleston Conference, Number 22: "Two Faces Have I — One for Books and One for Bytes"

...Conference Preview from Founder Katina Strauch

This year's Charleston Conference is coming up fast! October 30 is the date for preconferences, October 31-November 2 for the main conference. Six preconferences cover everything from the consortial site license to article linking, technical services workflows, digital copyright, managing serials, and managing acquisitions. The main conference will include papers on over 55 different topics organized into five plenary sessions, four concurrent sessions, two lively lunch sessions as well as one beastly breakfast session across two and a half jam-packed days.

Conference information is located at <http://www.cofc.edu/library/cdconference/> and will be updated regularly. Here are just a few of the many important topics to be discussed:

- Electronic Journal Use and Pricing
- Reports on Studies on Usage Statistics from several speakers (including a Saturday Roundtable on Interpretation and Implications of Usage Statistics)
- Aggregator Gripes
- How Users Use Print and Electronic Journals
- Preservation of the Historic Record in a Time of Electronic Scholarly Communication
- Collaboration Between University Presses and University Libraries
- Vendor Status Reports and What They Mean
- Simplifying the Way Information is Produced Lawfully
- Pay Per View Trends
- Print On Demand
- Vendor-Assisted E-Selection
- Strategic Duplication
- Return of Ownership
- DOI Panel
- Web-Based Acquisitions From Web-Based Vendors: Pros and Cons
- Portals as Collection Development Tools in the Digital Library
- eBooks: An Update

You won't want to miss anything. There is still room to register. Logon to <http://www.cofc.edu/library/cdconference/>.

See you in Charleston!

By the Numbers

30%...of doctors in active practice in the U.S. use handheld devices. The new generation is even more likely to use the technology: 85% of medical students and resident trainees indicate that they use a handheld computer. *ElsevierNews@elsevier.com*, no. 1, August 2002.

1 to 2 million...end-user clicks per month are now recorded by CrossRef's Digital Object Identifier (DOI)-based article linking database, according to the service. CrossRef is a non-profit publisher collaborative based on open standards to link online journal articles and users. *www.crossref.org*.

\$50,724...is the combined median salary for U.S. and Canadian ARL universities for professional librarians according to the ARL Annual Salary Survey for 2001-02. The figure is an increase of 3.4% over the previous year, for the first time in several years outperforming inflation in both the U.S. and Canada. *www.arl.org*.

1 billion...personal computers have been sold as of April 2002, according to a Gartner DataQuest report, which predicts the sale of the 2 billionth computer in 6 years. Barbara Quint in *Searcher*, October 2002.

60%...of respondents in a recent survey of 80 academic and special libraries believe they could obtain special funding for purchase of eBooks if the industry develops more quickly. *www.Primaryresearch.com*.

1 billion...DVDs have already been sold, since the widespread introduction of the format five years ago. The landmark was reached in half the time that VHS required in its day. More than 16,000 titles are now available on DVD. *St. Petersburg Times*, August 26, 2002.

37 cents...is the cost to mail a DVD using the U.S. Postal Service for "video-on-demand" buyers, versus an estimated \$20 to transmit a data file the size of a typical DVD movie over the Internet. *New York Times*, September 23, 2002.

31%...of college students in a recent OCLC-commissioned survey reported using Internet search engines to find answers to their questions. However, the same students estimate that half of their searches are unsuccessful. *Library Hotline*, August 5, 2002.

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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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Libraries on the Move

The University of Illinois at Urbana-Champaign Libraries have been awarded a \$1 million Mellon Foundation grant to be used to create OCLC records for 1.6 million items in the library's online catalog currently listed only as short records. The project will also create records for approximately 16,000 volumes of rare books not contained in the catalog and accessible only in paper format. The project is part of an initiative from the Foundation to identify major collections in the U.S. that lack computerized access. The grant is the second recently awarded to the University Library by the Mellon Foundation, which has already approved \$1 million for preservation, including \$300,000 for a conservation laboratory and \$700,000 in matching funds contingent on the Library's ability to raise \$1.4 million in a five-year period. *LJ Academic News Wire*, October 01, 2002

The U.S. Institute of Museum and Library Services (IMLS) has awarded \$1.8 million to seven universities and colleges to recruit and educate new library and information professionals. The awards fund advanced training, particularly in digital technologies. Recipients of the awards include the Chicago Library System and the University of California-Los Angeles, as well as Florida State University which is collaborating with the University of Illinois at Urbana-Champaign and the University of Washington-Seattle. Louisiana State University and A&M College in Baton Rouge are also recipients in collaboration with Auburn University, Georgia College and State University, the University of Kentucky, and the University of South Carolina. *American Libraries*, September 2002.

Stanford University Libraries, along with Sun Microsystems, has been awarded two new two-year grants totaling nearly \$3 million from the Mellon Foundation and the National Science Foundation (NSF). The funds are directed toward Stanford's LOCKSS (Lots of Copies Keep Stuff Safe) Program, a joint project of Sun and Stanford University Libraries to develop a secure, reliable system to preserve access to digital publications. The LOCKSS project began in October 1998 and is currently in a worldwide beta test. <http://lockss.stanford.edu/>

The Ohio State University Libraries has received a \$5 million gift to support the renovation of its Main Library. The gift will be complemented by another donation of \$2 million. Renovating campus libraries is a top priority in Ohio State's Academic Plan. The University plans to raise \$100 million for the project, \$30 million of which will come from the private sector. OSU officials hope to break ground on the renovations in 2005. www.lib.ohio-state.edu/Renovation/

The Public Library Association (PLA) is working to create a Collection Development Manual. PLA issued a Request for Proposal for the author of the work, which will be the sixth in its series of practical management works. The September 20, 2002, deadline for replying to the RFP has passed, but be sure to visit <http://www.pla.org/publications/coldevrpf.pdf> to learn more about this project.

The National Library of the Netherlands, the Koninklijke Bibliotheek (KB), will serve as the first official digital archive for Elsevier Science journals. The library will receive digital copies of all Elsevier journals currently available on ScienceDirect, Elsevier expects to digitize all back issues of these journals during the next two years and will also deposit the digitized backfiles with the KB. It is estimated that the initial collection, when all backfile digitization is completed, will exceed seven terabytes of data. *LJ Academic News Wire*, August 29, 2002.

Amsterdam 2002 Retreat: “User Behavior and Its Impact on Libraries and Publishers”

...“Quick Quotes” from TCR Editorial Board Member Linda Crismond

The Amsterdam 2002 Retreat was held July 18-20, 2002, fourth in The Fiesole Collection Development Retreat Series sponsored by The Charleston Company and *Against the Grain*. This year's retreat was hosted by Elsevier Science, with additional sponsorship from Erasmus, Kluwer Academic Publishers, Swets-Blackwell, and Sage Publishing. Linda Crismond offers the following “quick quotes” from the meeting.

- We now have “information spaghetti and value-added, fee-based services are losing their edge over free-access resources.” Leigh Watson Healy, Outsell, Inc.
- Academic librarians are experiencing “massive” declines in reference services (35% in the last three years). Circulation of materials peaked in 1995 and has been dropping ever since, but library staff remains the same and student bodies have grown. Chuck Hamaker, University of North Carolina-Charlotte.
- Bibliographic-only databases such as PAIS, Art Index, and Social Work Abstracts are not being searched as much in favor of full text databases. Chuck Hamaker.
- The future “information machine” has the following attributes: everything is there; access is easy; anyone can use it; great functionality and sophisticated searching; high quality content; secure and reliable; can be preserved and recovered from disaster; personal customization is available; and, whoever pays doesn't complain about the price. David Worlock, EPS, Ltd.

- Because the user doesn't bear the price for library materials, the price is not market driven. Therefore, there is chaos in pricing the electronic product. John Cox, John Cox Associates.
- Pricing for serials based on usage is becoming more prevalent because it is easy to monitor. Andrea Keyhani, Ingenta.
- Thirty percent of EBSCO's sales to academic libraries are for electronic serials. Andrea Keyhani.
- In the UK, the top 25 journals out of the 3,713 published account for 68% of the total dollars spent by academic libraries. Hazel Woodward, Cranfield University.
- Anything that will make searching easier and that will save time of the researcher will be adopted. Carol Tenopir, University of Tennessee, Knoxville.
- More productive users value current information more. The majority of writers wait for peer review before publishing. Peter Boyce, AAS.

*Ed Note: A full report of the conference will also appear in future issues of **The Charleston Advisor** and **Against the Grain**. Slides and papers from the Retreat are posted at the Website of Casalini Libri, the founding sponsor for the series. To read more, logon to http://digital.casalini.it/retreat/retreat_2002.html.*

On the Net: Copyright Concerns for Information Aggregators

Ed Note: A recent posting to [liblicense-l](#) points to a potential pitfall for producers of aggregated databases. The posting is reprinted in part here to give our readers a “heads-up.”

“I am currently negotiating with an electronic database vendor who has included in their license copyright restrictions on government documents that were previously public domain in print form. The vendor argues that all contents of their database are copyrighted, and do not want to delete like license clause. This concerns me because our patrons are used to these documents being free from copyright. But even more distressing — this issue brings up a bigger problem of third party copyright restrictions of any electronic contents, and whether libraries can fight that.”

Are Book Stores Still the Choice?

A recent survey of more than 2,200 respondents illustrated the reasons consumers still like to purchase books in a book store, rather than online. Here are the top five reasons a book store was preferred:

1. Didn't want to pay shipping and handling charges26.0%
2. Couldn't flip through the book first20.3%
3. Didn't want to wait for shipping15.7%
4. Wasn't certain it was exactly the book I was looking for ...14.4%
5. Price was lower in the store10.7%

Source: *Wall Street Journal*, July 15, 2002.

Don't Miss This

Public Library Data Service Statistical Report 2002 is now available from PLA. Data contained in the report was collected from more than 1,000 public libraries. Categories include financial information, library resources and output measures, annual use figures, technology in public libraries, and more. Library identification is also provided. For more information about the PLDS Statistical Report contact the PLA office at 1-800-545-2433, ext. 5PLA or pla@ala.org.

LibraryConsultants.org is a database driven Website aimed at libraries and providing a single site to access current consultant information. Consultants provide directory information including name, contact information, areas of expertise, and experience. Recent projects are also included for each Consultant listed in order to allow libraries to evaluate quality and “fit.” The database is searchable by name, state, and areas of expertise. Visit the directory at www.LibraryConsultants.org.

TCR Quotes

“You can't stop technology,” Shawn Fanning, age 21, Founder and Creator of Napster. *Wall Street Journal*, “Napster Boy, Interrupted,” October 1, 2002.

“When everything is under control, you are going too slow.” Mario Andretti, race car driver, quoted at this year's Amsterdam 2002 Fiesole Collection Development Retreat.

A Collaboratory: A Growing Theme for the National Library of Medicine

Even as more and more content is available online, recent articles and reports reveal a rapidly growing trend toward building “small group” and community spaces in all types of libraries, including those serving the public, academic, and medical sectors. In a recent presentation by Dr. Donald Lindberg, Director of the National Library of Medicine (NLM), organized by the University of Colorado Health Sciences Center, Lindberg presented plans for “Medicine’s Library of the 21st Century,” a new facility now on the drawing board to serve the largest medical library in the world.

In addition to its traditional role as the pre-eminent biomedical library for the U.S., NLM is home to the National Center for Biotechnology Information (NCBI), which produces the largest database of public DNA sequence information, Gen Bank, used daily by thousands of scientists. The U.S. Congress created the NCBI in 1988; in FY2001, Congress approved necessary funding to complete architectural and engineering designs for a new NLM facility to handle the accelerating demands on NCBI thanks to the Human Genome Project and other genome mapping activities. In addition, the expansion will recognize NLM’s expansion into serving consumer health needs.

NLM, ironically, has had to convert space intended to store library materials to better serve people and now finds that it will run out of space for its collections by 2004. Lindberg referred to the proposed new building as a “Collaboratory,” which will feature numerous small meeting room spaces to accommodate a growing demand for groups of six, eight, and 10 in team-based learning and research settings. Of note, these groups want to be housed in the library so that assistance from professional reference librarians is readily at hand. In addition,

the facility will be designed around these growing trends:

- the replacement of typical one year sabbaticals for individual researchers to groups or teams who visit the NCBI for weeks or months, to run experiments on the database, and then leave to analyze results at home;
- virtually empty individual study carrels;
- expanded visitor centers featuring interactive displays concerning medicine and medical research, as well as medical history.

According to Lindberg, unsolved problems for medical libraries at present include:

- delivering telemedicine to the home and serving home health care;
- going local to reach community based consumer health groups;
- developing special outreach programs to serve non-English speakers and those with low vision;
- preparing for the library’s role in disaster management and international affairs.

NLM and its partner network of eight regional and 130 resource center libraries, many at universities, are now working in partnership with local public libraries to reach citizens effectively. Lindberg notes that librarians feel good about the vast improvements which have been made for retrieving information, but feels this is a “librarian’s view.” The patient is not really seeking information but rather a solution to a problem, or at least, an understanding of a problem. So, the new goal in serving these users is to assist in “improving understanding.”

Top Ten Large Public Libraries (in rank order)

The following list is courtesy of the fourth annual listing from Thomas J. Hennen’s American Public Library Ratings (HAPLR) which are based upon a series of input and output measures, including expenditures per capita, percent of budget to materials, materials expenditure per capita, cost per circulation, collection turnover, visits per capita, etc.

Libraries serving populations over 500,000

1. Denver Public Library (CO)
2. Columbus Metropolitan Library (OH)
3. Multnomah County Library (OR)
4. Baltimore County Public Library (MD)
5. Indianapolis-Marion County (IN)
6. Hennepin County Library (MN)
7. Salt Lake County Library (UT)
8. Cuyahoga County Public Library (OH)
9. Montgomery County Public Libraries (MD)
10. Fairfax County Public Library (VA)

Rankings are available for all population groups, in a series of ten breakdowns, including those serving communities of 999 and under. *American Libraries*, October 2002.

Patterns Change in U.S. Book Sales

Recent data shows the following changes over a multi-year period in sales of general fiction and other selected genres, as a percent of all adult books sold in the U.S. nationwide.

	1999	2001	% change
General Fiction	6.4%	10.0%	+3.6
Mystery/thriller	13.8%	15.0%	+1.2
Religious	13.0%	13.5%	+0.5
Romance	20.7%	20.0%	-0.7
Business	5.8%	4.2%	-1.6

Source: *American Demographics*, July/August 2002.

Coming in Future Issues

- Hot Topics from the Charleston Conference
- Article Linking: Profiles of the Players
- Consortial Purchasing: Predictions for the Future
- eBooks: More Reports on Field Tests