



The CHARLESTON REPORT

Business Insights into the Library Market

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Top Seven Issues for Academic Libraries

Compiled by the Association of College and Research Libraries' (a division of the American Library Association) "Focus on the Future Task Force," this list reflects themes echoed by more than 300 academic librarians over the past 18 months.

1. Recruitment, education, and retention of librarians—finding and retaining quality leadership.
2. The role of the library in the academic enterprise—preserving its importance.
3. The impact of information technology on library services—maintaining an appropriate institutional balance between traditional library materials and services and new instructional and information technology departments.
4. Creation, control, and preservation of digital resources—determining what should be digitized, finding resources to do the work, and developing appropriate bibliographic control mechanisms.
5. Chaos in scholarly communication—managing the need for fair scholarly communication models as copyright laws evolve and challenges to fair-use in a digital context continue to be made.
6. Support of new users—including distance education students or those involved in new teaching and learning methods.
7. Higher education funding—facing the realities of reductions in funding that could have a deleterious effect on library programs, salaries, and resources.

Of particular importance to *TCR* readers are the following concerns, voiced as part of issue no.5 above:

"Traditional library/publisher relationships may change substantially. The consolidation of the information industry under a few large vendors is a substantial threat as it represents possible homogenization of information and the potential for monopolistic business practices. The rise of the Web as the first choice for student and faculty researchers represents a departure from traditional scholarly research patterns. Overcoming the apparent lack of commitment by the commercial information industry to future access of information will be an ongoing challenge for librarians."

To read the full report, logon to www.ala.org/acrl/hislenov02.html.

Libraries on the Move

The 23 campuses of the California State University (CSU) system are to receive \$656 million in bond funds for projects slated for 2002-2006. More than \$384 million of that sum will be targeted to library-related projects. Among the library allocations are \$19.5M for CSU Long Beach, \$8.2M for CSU Monterey Bay, \$35.6M for Cal Poly Pomona, \$19.6M to San Jose State University, another \$8.1M for equipment for the new university/city library in San Jose, \$7.4M for the new Library Information Center at CSU San Marcos; and \$4M to renovate and expand San Francisco State University's library. Another \$10.5 million is earmarked for the California State Library. *Library Journal Academic News Wire*, November 12, 2002.

Schools, libraries, and other non-profit groups will receive 5.5 million CDs worth \$75.7 million in the settlement of a class-action lawsuit filed by 40 states over price-fixing by five major U.S. record labels and three music retailers. The settlement was announced September 30, 2002; the original suit was filed in August 2000. Among others, the state of New York expects to receive over 350,000 CDs for its libraries. *American Libraries*, November 2002.

The University of British Columbia has received a donation of \$20 million Canadian (roughly \$12.5 million U.S.) from a former graduate, to be used to renovate the central library on campus. The funds will be part of a total budget of \$60 million (Cdn) to be devoted to transforming the current facility, which is 77 years old. Plans call for the new library to provide laptops, open computer labs, video conferencing, classrooms, and wireless technology. *Library Journal*, November 1, 2002.

Memphis and Shelby County's (Tennessee) new central library opened one year ago in November 2001 and has already posted a record 891,098 visits, up from 366,901 the prior year at its old location—an increase of 143%. An average of 72,540 people per month visit the new library. New card holders are also up by 282%, with 11,309 new cards issued to date. *Press Release*, Memphis-Shelby County Public Library, November 13, 2002.

The U.S. Department of Education has awarded the California State University at Northridge Library a \$1.6 million five-year grant (Title V) as part of its Hispanic Serving Institutions Program. Librarian Kathy Dabbour, the author of the grant, has developed several grant objectives including expanding the collection relating to Latino history and culture, acquiring and digitizing primary archival material relating to Latino individuals and organizations, and measuring the impact of instruction on student information literacy skills. To learn more about the project and grant, logon to <http://library.csun.edu/kdabbour/>.

Comedian Drew Carey, a Cleveland, Ohio native, has donated \$614,000 to the Ohio Library Foundation to be given primarily to three Akron/Canton area libraries (Medina County District, Orville Public, and Wadsworth Public libraries). Carey donated the money from the past two years of his winnings on various TV game shows, plus an additional \$32,000 of his own money. *Library Journal*, October 15, 2002.

Librarians Let Off Steam

... Summarized by Janet Flowers
jlflowers@email.unc.edu

In response to a survey sent out on *Acqnet* on August 1, 2002, a number of librarians ventilated regarding some of their pet peeves. Following is a short list of areas of concern.

- To be truly useful, vendor and publisher Web sites need to be current, accurate, and easy to navigate and search.
- Librarians need to have the option to use vendors to achieve economies of scale.
- Librarians purchasing print serials would like more standardization, please!
- Librarians would like vendors to provide adequate notice before visits, train their sales reps more thoroughly, and reduce turnover among sales representatives.
- Library systems vendors need to pay more attention to the special requirements of acquisitions and serials work, to use standards, and to seek more user feedback earlier in the systems design.

Although, in general, librarians were kind and respectful to one another; some of them did wish that we would develop more assertive skills, share more information with one another, and be more business-like in our dealings with vendors and publishers.

Ed Note: The full list of gripes and suggestions will be published in future issues of *Against the Grain*. Be sure to watch for it!

TCR Quotes

“People always overestimate how much will change in the next three years and they underestimate how much will change over the next 10 years,” Bill Gates, assessing the impact of digital technology while eating a cheeseburger and fries at the Top Notch Café in Colfax, Washington, one of the towns which benefited from his Gates Foundation library technology donations. *New York Times*, November 6, 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.

For comments and contributions, contact Rebecca T. Lenzini, <rlenzini@charlestonco.com>, Editorial Offices, 618 South Monroe Way, Denver, CO 80209. 303-282-9706, FAX 303-282-9743, (c) Copyright, The Charleston Co., 2002. All rights reserved. ISSN 1091-1863.

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By the Numbers

215%...is the increase in the average price of a journal since 1986, according to a recent Morgan Stanley Equity Research (Europe) report entitled “Scientific Publishing: Knowledge is Power.” The report also notes that the number of journals purchased in that same period has fallen by only 5.1%. The front page of the report was distributed by Charles Hamaker at the recent Charleston Conference and is summarized by UKSG's *Serials e-News* by Chris Beckett. http://www.bibliotech.com/UKSG/SI_PD.cfm?PID=10&ZID=469%20.

\$30,000...is the new award amount for Follett Library Resources “National School Library Media Program of the Year Award.” The award recognizes exemplary programs with awards of \$10,000 each in three categories: large school districts (>10,000 students), small school districts (<10,000 students) and single schools. Follett has sponsored the award since 1995. To learn more, logon to www.ala.org/aasl/awards.html.

25...is the minimum number of times a monograph is physically handled in today's distribution system, according to Richard Charkin, CEO of MacMillan/Palgrave who noted this statistic as part of his keynote address at this year's Charleston Conference on November 1, 2002.

\$775 million...is the amount lost in fiscal year 2002 by MIT's \$6.1 billion endowment, a loss of about 12%. Dartmouth's endowment declined 5.7% to \$2.3 billion. Boston University's, now \$585 million, lost 27% in fiscal year 2001 and 13% more in 2002. Quoted from *The Boston Globe* by *Library Journal Academic News Wire*, October 15, 2002

14%...of Australian university students may be pirating material off the Internet for their essays, according to a study conducted by CAVAL Collaborative Solutions, a co-operative serving nine universities in the Australian state of Victoria. The study used a U.S.-based plagiarism-detection service called Turnitin.com to analyze 1,925 essays, each provided by a different student at six institutions, including Deakin, La Trobe, Monash, RMIT, Victoria Universities, and the University of Ballarat. About 150,000 students are enrolled in the universities. <http://chronicle.com/free/2002/11/2002112001t.htm>.

£984 million...is the value of the European Online Information market, an increase of 6% from the previous year, according to research commissioned by Learned Information and conducted by IRN Services Ltd. The scientific, technical, and medical sector (STM) grew by 5% to £220 million in the same year. *Online Information Press Release*, October 17, 2002, www.online-information.co.uk.

22%...of virtual reference questions answered by the Cleveland Public Library are received between 9 p.m. and 9 a.m., according to Tracy Strobel, Web Applications Supervisor. Quoted as part of a panel discussion commissioned by *Library Journal*, October 1, 2002.

\$100 million...is the estimated value of paid online subscriptions now devoted to the field of Genealogy. Among the largest players are myfamily.com which supports roughly 850,000 paid subscriptions to its ancestry.com site. *New York Times*, September 23, 2002.

84%...of faculty and students surveyed by Drexel University prefer e-journals over print. Readers overwhelmingly felt that e-journals save time, make work easier, result in better quality research, and enable them to find more. *NetConnect*, Fall 2002.

Hot Topics from the 2002 Charleston Conference

... Reported by Katina Strauch, Conference Founder and Organizer

“Two Faces Have I: One for Books and One for Bytes” was the theme of the 22nd Charleston Conference which took place October 30 (preconferences) and October 31-November 2 (main conference) in lovely Charleston, South Carolina. Over 600 librarians, publishers, vendors, aggregators, and consultants met to discuss issues of common concern. One hundred sixty speakers presented eight preconferences, sixteen plenary sessions, twenty-five concurrent sessions, sixteen lively lunches, and six beastly breakfasts.

Here are some of the main themes that emerged.

“More than five clicks and you are dead.”

Linking sources to each other was on everyone’s agenda. The opening panel included Jim Mouw (Univ. of Chicago), Audrey Melkin (Ingenta), Oliver Pesch (EBSCO Publishing), and Walt Crawford (RLG) discussing the pros and cons of various types of and approaches to article linking.

“We are spending too much money on these resources not to show use data.”

The need for use statistics to aid with the selection and retention of electronic resources dominated many discussions. After an overview by Tony Ferguson (Univ. of Hong Kong), three panels included Chuck Hamaker (UNC-Charlotte), David Goodman (Princeton), Ann Okerson (Yale), Peter Shepherd (COUNTER), Marthyn Borghuis (Elsevier), Arthur Smith (American Physical Society), Eric Hellman (Openly Informatics), Phil Davis (Cornell), Kent Mulliner (Ohio University), and Robert Molyneux (University of South Carolina College of Library and Information Science). While everyone agreed that statistics are difficult to analyze, impossible to compare in most cases, and can be “enhanced” or “manipulated to best advantage by the publisher or aggregator,” everyone also agreed that use data must be kept and analyzed.

“There is no stable pricing for electronic products, especially from year to year. The basket of goods we are buying is always changing.”

Pricing of electronic databases and eJournals are still principle topics of discussion. Publishers are struggling to maintain market share and, so, are using varying pricing models.

Libraries are distressed by many of the models, including FTE pricing for niche, subject-specific databases. Among several presentations included one by Phil Davis (Cornell) and another by Stephen Rhind Tutt (Alexander Street Press).

“Who is going to run our world? OhioLINK or Elsevier?”

Budget concerns by many libraries spelled more cancellations of journal titles and even the cancellation of some electronic databases. A straw poll during the Weakest Link panel found 1/3 of the audience with budget cuts, 1/3 with budget increases, and 1/3 with the same budget from last year to this year.

“Publishers are still publishing them, libraries are still buying them, and vendors still exist with the goal of distributing them.”

Though electronic formats, digital content, and online access were a big part of the conference, there was still much time devoted to discussion of the “antiquated” print book. How publishers and vendors market and sell printed books was the topic of a panel discussion entitled “Vendor Marketing Tactics,” moderated by Chuck Hamaker (UNC-Charlotte), and including Arlene Sievers (Case Western Reserve) John Smith (Total Information), Matt Nauman (Blackwell’s) and Linda Gagnon (Yankee Book Peddler). This session focused on costs from the vendor side to attend and display at conferences, produce catalogs, and other PR efforts. Print on Demand was also discussed in a panel led by Nora Kisch (Rowman & Littlefield) and Kirby Best (Lightning Source) as yet another alternative.

A final observation.

eBooks have moved to the back of the agenda. Libraries are now focusing on collections of reference materials online rather than on individual eBooks.

And don’t forget...

Many of the powerpoint presentations from the 2002 Charleston Conference are available at <http://www.cofc.edu/cdconference/presentations2002.html>. The 23rd Charleston Conference will be held November 4, 2003 (preconferences) and November 5-8, 2003 (main conference) in Charleston, SC. For further information, contact Katina Strauch, <strauchk@earthlink.net> or <strauchk@cofc.edu>. See you there!

Did You Know?

The Charleston Advisor was recently selected by the Colorado Association of Libraries’ Awards Committee as the 2002 Literary Award winner. In making the award, the committee noted that “This is the first publication that is dedicated to evaluating costly Web products as its sole mission. *The Charleston Advisor* has become a welcome tool in evaluating potential purchases.”

Publishers: Your Recommendations Please!

The Resources for the Adult New Reader Committee of the PLA Library Services Cluster is soliciting input for its “Best Books for the Adult New Reader 2003” list. The charge of the committee is to inform publishers that librarians have a growing interest in professional and learning materials in the areas of adult education, including literacy, GED, career information, and various other areas; to encourage publishers to produce and market more titles on these subjects; to encourage publishers to carry more adult education materials; to encourage publishers of adult education materials to exhibit at library conferences; and to generate ideas for section programs and publications.

Recommendations from publishers are welcome. To submit an entry, send book title, copyright date, and publisher’s name to Nick Fogarty at <fogartyn@mail.cherokee.public.lib.ga.us> or by mail to Cherokee County Libraries, 116 Brown Industrial Parkway, Canton, GA 30114. Deadline for input is January 10, 2003.

What Librarians Want from Usage Data

A recent survey completed by project COUNTER (Counting Online Uses of Networked Electronic Resources) reveals that librarians want the following:

- a small, but reliable, set of reports
- reports which are available via the Web, with password protection
- reports available within 2 weeks of the period measured
- year to year comparisons wherever possible

COUNTER is an international cooperative of publishers and intermediaries who are working to develop a common set of standards for usage data. The organization's first "Code of Practice" guidelines will focus on journals and databases and is expected to be in production by 2004. The group is already asking libraries to include the term "COUNTER Compliant" in contracts and license requirements for electronic offerings. To learn more about COUNTER, logon to www.projectcounter.org. To see the full survey results, go to www.projectcounter.org/survey_results.pdf.

SPARC Issues Guidelines for Digital Repositories, Challenges Publishers

SPARC (the Scholarly Publishing and Academic Resources Coalition) has released its first white paper. "The Case for Institutional Repositories: A SPARC Position Paper," The 36-page study examines the policy and management issues surrounding digital capture of the scholarly output from academic communities and supports the idea that academic libraries should play a key role in reasserting "control over scholarship by the academy."

"Historically," the report notes, "the publisher contribution to the scholarly publishing value chain concentrated on the distribution component, tasks that authors and libraries gladly delegated." But with digital publishing and networked distribution technologies, the report notes, the "relative value of print production and distribution has declined," forcing publishers to protect revenues by "real or artificial added-value programs," such as bundled print-and-digital offerings or cross-subject aggregations, to support prices.

The paper suggests that library programs and budgets shift to accommodate the creation of repositories—defined as "any collection of digital material hosted, owned or controlled, or disseminated by a college or university." In this case, repositories are seen as the aggregation of data for open-access publishing. In other words, academic libraries should collect and make research freely available to other researchers. Libraries would provide the archival standards, authority controls, metadata tagging, and other content management requirements that increase access to and usability of the data.

The report further suggests that the development of an institutional repository program will increase the visibility of libraries within the university, increasing their relevance to the faculty and the institution. To read the study, visit www.arl.org/sparc.

Books Lose Ground Again

A recently released study shows that academic libraries are spending more of their budgets on electronic resources at the expense of books. The study, released by the New York-based Primary Research Group (PRG) in August, sampled 66 academic libraries across the nation, concluding that academic libraries have "significantly cut spending on print resources" in 2002, with spending on books down nearly 6% from the previous year. The summary goes on to state that in 2002, the 66-library sample recorded the largest drop in book spending since PRG began sampling library spending in 1993, adding that this was the second consecutive year that libraries showed a significant cut in book spending. For more information, or to order a copy of the report, visit www.primaryresearch.com.

Wall Street Journal Rates Online Reference Services

A recent *WSJ* article in its "Personal Finance" section compared three online reference services which are familiar to those of us in the library and information industry: Google Answers (answers.google.com), LiveAdvice.com, and the OCLC/Library of Congress offering QuestionPoint (www.loc.gov). The writers tested each service on four questions, two asking for advice and two asking for hard-to-track-down facts. The "Top Choice?" Google Answers, which was rated as best on the basis of cost, time, and quality of response.

Google Answers is reported as providing answers to questions within 1 to 2.5 hours after they were posted. The joint OCLC/LC offering, QuestionPoint, was rated lowest, though it received kudos for being free. The *WSJ* reported that only one QuestionPoint answer arrived within 5 business days and one answer never came. The article also notes that "Go to a library and ask a reference librarian for help," was one of the basic answers to one of its questions directed to the service.

Ed Note: Google Answers are provided by online researchers in a competitive "bidding" setting. For a first-hand account from the point of view of the professional, be sure to read "My Experience with Google Answers," by Jessamyn West, Proprietor, librarian.net in *Searcher* (available online in full text at www.infoday.com/searcher/oct02/west.htm). The full *Wall Street Journal* comparison appeared on Tuesday, October 15, 2002, page D2.

Coming in Future Issues

- The Future of the Big Deal in Consortial Purchasing
- Outcome-based Measurement vs. Usage Statistics: The Debate Among Librarians
- Hot Topics from ALA Midwinter
- Readership Surveys: Preferences for Electronic Formats