



The CHARLESTON REPORT

Business Insights into the Library Market

MARCH / APRIL 2003

VOLUME 7, NO. 5

Short Takes

Dr. Herbert Van de Sompel of the Los Alamos National Laboratories is the winner of the Frederick G. Kilgour Award for Research in Library and Information Technology for 2003. The award is sponsored by OCLC and the Library and Information Technology Association (LITA), a division of the American Library Association, to honor the achievements of Frederick G. Kilgour, the founder of OCLC. The award is given to a person who has amassed a significant body of "real world" research in the field of library and information technology that has had an impact on the way in which information is published, stored, retrieved, disseminated, or managed. Van de Sompel is being honored for his efforts in the creation of OpenURL/SFX, a linking system now in use in hundreds of libraries world-wide. He is also credited with developments in the area of metadata "harvesting." Be sure to read *The Charleston Advisor's* Interview with Van de Sompel (v.4, no.4, April 2003), at www.charlestonco.com.

JSTOR has expanded its target market to include secondary schools (high schools). A two-year pilot program found that early training in use of the database better prepared young students for college-level research and assisted those students already taking advanced placement courses for college credit. Staff at JSTOR also feel that students who have experienced a high quality database such as JSTOR will be better able to distinguish between search results found via Yahoo or Google compared to peer-reviewed resources. *Library Journal*, February 15, 2003.

Libraries on the Move

Despite a reduction of \$2 million from its current \$38.7 million budget, the University of Michigan Library System's \$16 million materials budget will be preserved. The library will, however, lay off 15 full-time employees, eliminate 16 vacant positions, and transform 11 full-time positions to part-time, in an effort to save funds. Changes will take effect July 1. *Library Journal Academic News Wire*, April 01, 2003

The Kern County (California) Library has been awarded \$2 million in funding from the Federal Temporary Assistance for Needy Families (TANF) by the Kern County Human Services Department. Funds will be used to purchase a wide variety of relevant books, audiovisual materials, computer programs, and Web-based databases that meet the informational needs of needy and at-risk people. Among the areas to be developed are job preparation, promotional job skills, parenting, pregnancy prevention, literacy, general education diploma (GED), English as a second language, basic math and reading skills, career planning, self-guided computer programs, and child development. *Kern County Library Press Release*, March 31, 2003.

MIT's DSpace project has welcomed six institutions to its DSpace Federation. Joining the project are Columbia University, Cornell University, Ohio State University, the University of Rochester, the University of Toronto, and the University of Washington at Seattle. DSpace was developed with a \$300,000 Mellon Foundation grant, in partnership with \$1.8 million from Hewlett-Packard to create open source software to be used in the creation of institutional repositories (see our related article in this issue of *The Charleston Report*, pg.2). To learn more about DSpace, logon to <http://dspace.org/index.html>.

The American Library Association has named April 30 as "El día de los niños/ El día de los libros" to call attention to the importance of children, families, and reading. Working with the Kellogg Foundation, as well as REFORMA (the National Association to Promote Library and Information Services to Latinos and the Spanish-Speaking), ALA has created a recommended reading list of books by and about Latinos for children through the age of ten. The list is available at www.ala.org/alsc. Brochures promoting the books and the program are also being distributed to libraries and ALA members throughout the U.S. *ALA Press Office*, March 2003.

The U.S. Library of Congress has received approval for the release of \$20 million for the next phase in the development of the Library's "Plan for the National Digital Information Infrastructure and Preservation Program (NDIIPP)." The goal of the effort is to enable the Library to launch the initial phase of building a national infrastructure for the collection and long-term preservation of digital content. LC will raise up to \$75 million in private funds and in-kind contributions as part of its efforts, to be matched by the U.S. Congress. To learn more about the project, logon to www.digitalpreservation.gov/ndiipp.

The Canadian National Site Licensing Project (CNSLP) has announced its agreement with Elsevier to license ScienceDirect for 61 institutional members, serving an estimated 650,000 students, researchers, and scientists. The agreement runs through 2006 and allows the consortium to append its new agreement to an existing Academic Press contract. Previously, only 11 CNSLP member institutions had access to ScienceDirect. *Library Journal*, March 15, 2003.

The Carnegie Library of Pittsburgh will begin a \$40 million project to renovate or replace all 18 branches in its system. Of the funding, \$15 million will be managed through the Allegheny Regional Asset District (RAD), the library's current funding agency. The remaining \$25 million will be raised from private donations, foundations, and some government support. The project is anticipated to require five years. *American Libraries*, February 2003.

The University of California's Collection Management Initiative

... by Cecily Johns, California Digital Library

In late 2000, the Mellon Foundation awarded the University of California a two-year grant (which was extended by 6 months) to store print journals in a remote location and to collect data on use of the stored journals and their digital counterparts.

Usage data was collected for the 12 months ending October 1, 2002. Approximately 300 journals were selected for the study. For each journal title two print copies were available on at least two UC campuses. One print copy (called the experimental copy) was relocated to storage and the other print copy (called the control copy) remained in the library. Usage data was collected for the experimental copy in storage, the control copy in the library, and the digital counterpart. Control and experimental journal titles were selected by the campuses prior to the study. Some campuses relocated all the Collection Management Initiative (CMI) journals to remote storage. Some campuses opted to leave their CMI journals in the library. Some campuses chose to have both experimental and control journals.

Usage data was collected for both print copies (the one at the control campus and the one at the experimental campus) plus their digital counterparts. Usage statistics for CMI journals is organized on the spreadsheets into four major subject categories.

- 8 % of the titles were in the Arts and Humanities. Average use of the digital version of each title was 10 times greater than use of the control print copy. That is, even when a print copy was available in the library, the use of the digital version was still greater than the use of the print by a factor of ten.
- 37% of the titles were in the Physical Sciences and Engineering. In this group, use of the digital version on the control campus was 24 times greater than use of the control print copy.
- 9 % of the titles were in the Social Sciences. In this group use of the digital version on the control campus was 10 times greater than use of the control print copy.
- 46 % of the titles were in the Life and Health Sciences. In this group use of the digital version on the control campus was 9.4 times greater than use of the control print copy.

The Charleston Report, Business Insights into the Library Market is published six times a year by The Charleston Co., 618 South Monroe Way, Denver, CO 80209. Subscription price per year is \$155 (U.S.) and \$170 (outside the U.S.). FAX: 303-282-9743.

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.

Editor: Rebecca T. Lenzini

Editorial Board: Katina Strauch, Linda F. Crismond

Chief Financial Officer: Rebecca T. Lenzini

Publisher: The Charleston Co.

Graphic Design: Toni Nix • Masthead Design: Jack Thames

Institutional Repositories: What Are They? And How Do They Affect Us?

One of the hottest new topics for libraries and collections is that of "institutional repositories," but what exactly are these? A recent article by Clifford Lynch, Executive Director of the Coalition for Networked Information may shed some light for *TCR* readers (excerpted and rephrased by your editor).

Lynch: "I have argued that research libraries must establish new collection development strategies for the digital world, taking stewardship responsibility for content that will be of future scholarly importance. Institutional repositories are a place where they can put much of the material that research libraries identify as worth collecting."

Q. *What exactly are institutional repositories?*

A. A set of services which manage and distribute digital materials created by a university or institution and its faculty and scholars (and in some cases, students).

Q. *When did institutional repositories become prominent?*

A. The fall of 2002 can be seen as the point at which institutional repositories emerged as a "new strategy" for universities to support their scholars in a truly active manner and to "accelerate" changes taking place in scholarly communication.

Q. *Who creates and manages the institutional repository for the university?*

A. Often these efforts are a collaboration among librarians and the library, along with information technology specialists and staff, archives managers, faculty members, and the university administration.

Q. *How are institutional repositories different from scholarly publishing?*

A. Institutional repositories are more diverse and less formal than traditional scholarly publishing and are focused more on the dissemination of information rather than on the roles of peer review and other editorial processes, which are part of scholarly publishing.

Q. *Will institutional repositories replace publishers?*

A. Institutional repositories encourage the exploration and adoption of new forms of scholarly communication that exploit the digital medium. They facilitate change not so much in the existing systems of scholarly publishing, but rather open up entire new forms of scholarly communication that will need to be legitimized and nurtured in the both the short-term and long-term.

Q. *What are two examples of successful institutional repositories?*

A. MIT's DSpace (www.dspace.org) and in the UK, the University of Southampton's eprints project (www.eprints.org).

Excerpted and rephrased from "Institutional Repositories: Essential Infrastructure for Scholarship in the Digital Age," *ARL Bimonthly Report on Research Library Issues and Actions* from *ARL, CNI and SPARC*, no. 226, February 2003.

Hot Topics from UKSG in Edinburgh

The United Kingdom Serials Group (UKSG) hosted 540 delegates and more than 40 exhibitors at its Annual Conference that was held from April 7-9, 2003, at Heriot-Watt University in Edinburgh, Scotland. A full conference report will appear in the July 2003 issue of *The Charleston Advisor* (v.5, no.1). Listed below is a quick summary of some of the “Hot Topics” from this excellent meeting.

Selected Speaker Comments

- e-communities, portals, and institutional repositories are discussed in nearly every session
- “open access” was also a popular topic

From Lynne Brindley, The British Library

- “the library of record” is a concept of the past
- international and inter-disciplinary efforts are gaining force

From David Seaman, Digital Library Federation

- the biggest concern of users is “lack of time” for finding the information they need
- users want more content and more integration of information sources
- content needs to be compatible not just with the Web, but with PDAs, wireless devices, eBooks, print-on-demand, etc.
- users want to be able to re-shape information and data, and want the tools to accomplish this goal

From William Nixon, University of Glasgow

- scholars worry that publishing their works in institutional repositories will prevent future formal publication of the same work by a scholarly publisher

From David Prosser, SPARC Europe

- site licenses are seen as a short-term solution to purchasing challenges
- advocates of open-access solutions want to see funds currently devoted to limiting access and validating usage to be redirected to wide-spread dissemination and the framework to accomplish this end

From Mark Rowse, Ingenta

- “content chaos” is reigning
- simple and seamless access is the desired result of the efforts of both publishers and intermediaries to better serve the user

From John Cox, John Cox Associates

- consortial purchasing has moved the most valuable and profitable journal titles away from subscription agents and direct to publishers
- small publishers are actively seeking help with marketing and also with positioning to take advantage of consortial purchasing

From Maurice Long, BMJ Publishing Group (Consultant)

- the journal as a branding mechanism will not die
- middlemen won't die
- the author will never pay (likewise, the reader will never pay)
- acquisition funds will never match the information needs of the institution and its users
- the number of mergers and acquisitions among publishers and intermediaries will slow down
- paper will become a by-product of digital

From Jan Velterop, BioMed Central Ltd.

- the cost to publish an article at BioMed Central is 1/10 of that of a commercial publisher (\$500 vs. \$5,000)
- at least 75% of scientific research is funded with public monies
- the average scientific journal is now seen by less than 400 subscribers

From David Nicholas, City University London

- user data shows that searching depends on “digital visibility”
- most users “feed” for information horizontally and seldom penetrate deeply
- users will “squirrel” articles during a free period (printing and downloading in mass)

The Charleston Report To Be Issued in PDF

For all those who have asked us to offer an electronic version of *The Charleston Report*, we are pleased to advise you that we will begin distributing the report in PDF format in addition to (or in place of) print beginning with v.8, July/August 2003. Watch for sign-up information coming with our next issue and don't miss out!

Did You Know?

Oprah Winfrey, who suspended her book club last April, has announced that she will start it up again, this time with a focus on “classics.” Visit www.oprah.com/books/classics/books_classics_news.jhtml to read more.

Mark Your Calendars

2003 Charleston Conference. November 5, 2003 — Preconferences and Vendor Showcase. November 6-8, 2003 — Main Conference Session. College of Charleston Lightsey Conference Center, 160 Calhoun St., Charleston, S.C.

Don't Miss These!

Project COUNTER's Code of Practice is now available at www.projectcounter.org/code_practice.html. The Code specifies in detail the requirements that vendors must meet in order to name usage reports from their products COUNTER-compliant.

John Cox Associates and Informed Strategies have announced their new “Consortia Purchasing Directory,” a single volume designed as both a guide to the issues and a directory of international consortia that license content. More than 160 consortia have been selected, including over 50 consortia that are not currently members of ICOLC (the International Coalition of Library Consortia). More information is available at http://www.informedstrategies.com/consortia_pd.shtml.

By the Numbers

52.8%... of Internet users believe that most or all online information available on the Internet is reliable and accurate, down from 58% percent in 2001, according to the third annual UCLA Internet Report. <http://ccp.ucla.edu/pages/internet-report.asp>.

\$12,067... is the average total staff training budget in libraries, approximately 1/2 of 1% of the library's total operating budget (\$2.426 million on average), according to a study on "Library Training & Education Market Needs Assessment" conducted for OCLC by Outsell, Inc. The report is available at www.oclc.org/promo/unlimited/edu01b.htm.

100,000... is the number of students currently enrolled in online MBA programs in the U.S. Among the universities offering an online MBA are Stanford, Columbia, and the University of Chicago. *New York Times*, March 26, 2003. www.nytimes.com/2003/03/26/nyregion/26MBA.html (registration required).

98.7%... of public libraries now have an Internet connection, up from 95.7% in 2000, according to a study commissioned by the Institute of Museum and Library Services. *Library Journal*, March 15, 2003.

\$5.2 billion... is the amount American colleges and universities expect to spend this year on information technology, roughly 5% more than in 2001-2002, according to an annual survey conducted by Market Data Retrieval. *Chronicle of Higher Education*, March 26, 2003. <http://chronicle.com/free/2003/03/2003032601t.htm>.

31%... of books were processed as shelf ready by Blackwell's last year, compared to 18% in 1998, a trend shared by other book vendors. "A Year in Review," Dan Halloran, *Against the Grain*, February 2003.

\$560,000... is the amount of the 12th H.W. Wilson library school scholarship grants program, which delivers grants of \$10,000 each to 56 ALA accredited library schools. Funds will be distributed over four years, from 2004-2007. *Press Release*, February 14, 2003.

4,577... master's degrees in library science were awarded in the U.S. in 2000, versus 7,001 in 1970. As a comparison, 112,258 MBAs were awarded in 2000 — 25,977 in 1970. *LJ Index*, 2003 Movers & Shakers.

24%... is the increase in tuition in Massachusetts at four-year state universities for the 2002-2003 academic year. Texas posted a 20% increase. The average in the U.S. was 7%. Incomes rose 1-2% in the same period. *Wall Street Journal*, February 11, 2003.

\$117 million... is the amount ARL libraries report spending on electronic serials and subscription services today, up from \$11 million in 1994/1995. *ARL Bimonthly Report on Research Library Issues*, no. 225, December 2002.

TCR Quotes

"Google won. You can go home now." Danny Sullivan of Search Engine Watch (www.searchenginewatch.com) in a recent speech to an audience of information professionals.

ATG Annual Survey Report

Each year, *Against the Grain* produces its Annual Survey Report on a wide variety of topics relating to acquisitions and collection development. For a good look at the "grass-roots" of library issues and practices, read on.

Major Concerns

- the rampant merging going on among publishers and vendors
- falling budgets and rising prices for materials
- the increasing need to keep the same information in multiple formats
- the struggle to keep up with rapidly evolving technologies
- increasingly restrictive copyright laws and license agreements
- archiving and specifically, how to archive electronic resources

Budgets and Purchasing Results

- 75% of those surveyed have purchased eBooks (through netLibrary and consortia)
- 8% have outsourced acquisitions
- 25% have been downsized in the past year
- 75% report decreasing or flat book budgets (average decrease: 15%)
- 55% report rising journals budgets (average increase: 9%)
- 65% report rising budgets for electronic resources (average increase: 14%)

Budget allocations were reported as follows: 25% to books, 50% to journals, 19% to online resources including electronic journals, 1% to CD-ROMs, 5% to microfilm and fiche and other AV.

ILL, Document Delivery, and Statistics

- 45% use commercial document delivery (55% do not)
- 82% use doc delivery/ILL statistics in making collection development decisions
- 88% keep use statistics (however most are unable to analyze them, because either they are too difficult to interpret or staff is not adequate for the task)

Professional Reading and Internet Usage

Survey participants report using the Internet to search both publishers' and vendors' Web sites for the following activities: ordering, claiming, searching, and hunting for out-of-print titles. Participants listed the following publications as useful to them (in order of popularity): *Against the Grain*, *Library Journal*, *C&RL*, *Choice*, *Publishers Weekly*, *Information Technology in Libraries*. Also listed as popular were *American Libraries*, *The Chronicle of Higher Education*, *Computers in Libraries*, *LRTS* and *LCATS*.

Source: *Against the Grain*, February 2003. www.against-the-grain.com.

Coming in Future Issues

- Hot Topics from ACRL in Charlotte, N.C.
- Previews of the 5th Annual Fiesole Retreat in Oxford
- Virtual Reference: What's Happening
- Budget Update for U.S. Libraries