



The CHARLESTON REPORT

Business Insights into the Library Market

NOVEMBER / DECEMBER 2003

VOLUME 8, NO. 3

Libraries on the Move

The Institute of Museum and Library Services (IMLS) has awarded \$10 million in 27 inaugural grants for "Recruiting and Educating Librarians for the 21st Century," a new program supported by Laura Bush and the White House. The Institute received 76 grant applications requesting more than \$27 million in FY 2003. The 27 grants awarded will help recruit 558 individuals (493 students of library science at the masters level, 35 at the doctoral level, and 30 at the paraprofessional level). The grants will also fund research to establish much needed baseline data to support and evaluate successful recruitment and education programs. The grants range from \$131,955 for Vanderbilt University's Eskind Biomedical Library to \$500,000 for the Free Library of Philadelphia. For 2004, President Bush has requested \$20 million for the program. For more information and a full list of awards, logon to www.ims.gov/whatsnew/current/102803.htm.

Construction is now officially scheduled for fall 2004 on a new \$64 million library for the California State University Monterey Bay (CSUMB) campus. The 200,000 square foot building will be designed to serve more than double the nearly 4,000 students currently enrolled at CSUMB. The collection is expected to grow from the 56,000 books currently held to roughly 900,000 volumes. In addition, the library will feature 1,600 study nooks, group study rooms and classrooms, lecture theaters, a reading room, as well as a cafe and computer labs. The library is scheduled to open sometime in 2007. *Library Journal Academic Newswire*, December 16, 2003.

In the UK, the Joint Information Systems Committee (JISC) has provided funding to allow the content in the Early English Books Online (EEBO) database to be available free of charge to all UK higher education institutions. EEBO is a digitized collection of over 125,000 titles published between 1473 and 1700 and is available from ProQuest. *JISCMAIL*, November 4, 2003.

The Duke Endowment will contribute \$54 million in grants to North Carolina and South Carolina institutions. Among the recipients is Duke University, which will receive more than \$13 million, of which \$6 million will be targeted to the renovation of the Perkins Library. Furman University will target \$1.9 million of its grant award toward the renovation of the school's James B. Duke Library. The Endowment was founded in 1924 by industrialist Duke and supports programs aimed at higher education, health care, children's welfare, and spiritual life in North Carolina and South Carolina. *Library Journal Academic Newswire*, December 11, 2003.

Evaluating Databases in Times of Shrinking Library Budgets

...report from the Charleston Conference

How are database decisions made? This question led off a panel discussion at the Charleston Conference on Friday, November 7, 2003. In the quality vs. quantity debate (that is, judging value by the number of hits a database receives), all panelists agreed that number of hits can be manipulated easily and therefore is an inappropriate measure. Chuck Hamaker, University of North Carolina Charlotte, noted that MetaSearch engines will increase "hit" levels. Mark Sandler, University of Michigan, posed the issue as "a significant number of uses vs. a significant use."

Sandler, speaking of large historical files with which he has been working, uses the following criteria for evaluating commercial offerings: image quality, image format, record quality, use of standards, whether data is "integratable," functionality, licensing terms and cost vs. value. He suggested that, in order to be good consumers, librarians must understand costs of conversion and should ask whether a library or a group of libraries can build certain databases, rather than purchase them.

Beverlee French, California Digital Library, focused on de-selection of databases in a consortial setting. The CDL is currently eliminating licensed content due to budget constraints. Of note, the consortia considers bibliographic databases and e-journal packages as two separate categories and evaluates them differently. French referred to current e-journal packages as a "house of cards."

In looking to de-select databases, CDL regards certain files as "core" and therefore likely to be picked up by individual libraries; these are candidates to be cut at the consortial level. Other factors considered include content overlap, functionality, and price increase histories. The consortia is also now creating scores to reward "fair, reasonable and creative vendors" vs. "high maintenance vendors" (i.e., those who are difficult and time-consuming to deal with). In examining e-journal packages, she notes that the CDL is looking to eliminate entire packages and that the least flexible publishers would most likely be the first to be cut.

Did You Know?

Emerald has announced a call for entries for the 2004 Research Fund Awards. The Awards Foundation will consider proposals that are based on the objective of increasing the effectiveness of the scholarly knowledge creation and transmission process. The awards are open to any researcher or author who has assigned copyright to an Emerald journal. Applications are due by February 29, 2004. For further information, logon to www.emeraldinsight.com/researchregister/err_fundaward.htm.

By the Numbers

40%... of ARL members are considering canceling a “big deal” this year, according to a survey of ARL members over the summer. <http://www.arl.org/arl/meetings/143/scholarlycommunication.html>

450,000... is the backlog of US patent applications now pending for all types of inventions; software and Internet-related patents account for more than 15% of all patents granted. The overall number of patents has nearly doubled since 1990. <http://www.washingtonpost.com/ac2/wp-dyn/A54548-2003Dec10?language=printer>

60%... of eBooks sold today are in Palm Reader format. *NetConnect*, Fall 2003.

\$1.76 billion to \$1.91 billion... is Amazon’s sales projection for the holiday quarter in 2003, the largest in its history and an increase of 23% to 34% over last year’s fourth quarter. *PW NewsLine*, October 21, 2003

11,000 to 12,000... visitors per day are now entering the new San Jose joint use Martin Luther King Jr. Library, up from 8,000 per day in 2002. Asked for an explanation, “it’s just a beautiful library,” said San Jose State University Dean of Libraries Patricia Breivik. *Library Journal Academic Newswire*, November 25, 2003.

52%... of referrals to ScienceDirect are from library Websites, according to Elsevier’s Marthyn Borghuis. Of note, Elsevier estimates that by February 2004 over one billion articles a month will be downloaded worldwide from the database. “News from Yesterday,” 23rd Charleston Conference, November 7, 2003.

60,000... people attended First Lady Laura Bush’s third annual National Book Festival in Washington, D.C. *St. Petersburg Times*, November 5, 2003.

2%... is the increase in the average price of an approval monograph over last year, based on the 41,639 academic monographic titles handled by Blackwell’s in the year ended June 2003. *Against the Grain*, November 2003.

\$171 million... is the amount spent on electronic resources by 110 ARL university libraries in 2002, with another \$20 million spent through centrally funded consortia. The figure represents roughly 20% of the combined acquisitions budgets, up from 3% spent on electronic resources a decade ago. *ARL Bimonthly Report*, no.230/231, October/December 2003.

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 2003, The Charleston Co. 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

Short Takes

OCLC is making 2 million of its 53 million WorldCat records available for Google indexing. The records selected represent only 3.8% of the items in WorldCat; however, each record is held by more than 100 libraries, so should represent more popular works. Approximately 12,000 libraries are participating in this pilot which runs from June 2003-June 2004. Internet users searching for a book will see a Google listing for the item as it appears in WorldCat. When users select the WorldCat link, they will be prompted to enter their zip code and will be presented with a list of nearby libraries that hold the item searched. Internet users will not be able to search the full WorldCat and libraries may decline to participate in the project. For more information, logon to www.oclc.org/worldcat/pilot/default.htm.

Users accessing full text articles in Project Muse, Scholarly Journals Online, can now see an online statement identifying the subscribing institution through which the user is accessing the resource. The statement appears on the Muse basic search interface and at the top of each full-text article page. According to Project Muse, many subscribers have requested such a feature, to help inform users that the resource is paid for by their library. The new feature is automated and matches the IP address from which the user is accessing full text. If no IP can be determined, a default statement will appear stating “Access to full text is provided by your local institution.” For more information, contact <muse@muse.jhu.edu>.

The Association of Learned and Professional Society Publishers (ALPSP) has issued a statement supporting new Open Access publishing models. The ALPSP states it is “wholly in favour of maximizing access to research literature,” and has advised members and others that it intends to coordinate as much information-sharing as possible on the various Open Access Journals experiments over the next year. For more information, logon to the ALPSP Website at www.alp.org.

Classical.com is offering Web-based promotional resources to help consortia and others present the service to end-users. Included on the company’s Website are PDFs of brochures, text descriptions for cutting and pasting, photos, logos and even a PowerPoint presentation. To take a look, logon to www.classical.com/index.php?s=30.

CrossRef will be dropping its DOI (digital object identifier) retrieval fees for all members and affiliates beginning January 2004. The move is designed to provide open access to the CrossRef System, giving users unlimited access to DOIs, and is seen as a benefit to small and secondary publishers. The database now covers over 8,700 journals, with 10 million individual content items, including not only articles, but also books and conference proceedings. *CrossRef Press Release*, November 14, 2003.

TCR Quotes

“Abstracts are worthless. Where is the full text?” Panel of College of Charleston undergraduate students, Rump Session, 23rd Charleston Conference, November 8, 2003.

Hot Topics from the 23rd Charleston Conference & Preconferences

The 2003 Charleston Conference had a record 729 attendees. Since its inception in 1980 with 25 people, the Conference has seen a steady rise in the number of registrants who include librarians, publishers, vendors, aggregators and consultants—all on an equal footing since exhibits occur only on the Preconference day (prior to the main Conference). This approach allows vendors and publishers the freedom to attend sessions as full-fledged participants in the programs without having to also support exhibits.

The 23rd Charleston Conference opened Wednesday, November 5th, with three preconferences — Serving our Users: The Value of Usability, Technical Services Workflow, and Serials Management. Over 200 people attended the preconferences. **The Charleston Advisor's** Vendor Showcase was held from 12-6 PM. Forty table-top exhibits were visited by well over 400 people.

The main conference began on Thursday, November 4 and lasted through Saturday, November 6. The theme was “Games People Play” and included five plenary sessions, sixty concurrent sessions, eighteen lively lunches, and six beasty breakfasts. Just a few of the over 135 speakers included: Bernadine Abbott-Hoduski (Government Information Advisor), Rick Anderson (Director of Resource Acquisitions, University of Nevada, Reno), Matthew J. Bruccoli (Jeffries Professor of English, Univ. of South Carolina), Natalie Ceeney (Director, Operations & Services, The British Library), Philip Davis (Life Sciences Bibliographer, Mann Library, Cornell University), Fred Friend (Consultant, Joint Information System Committee, UK), Margaret Landesman (Head of Collection Development, Marriott Library, Univ. of Utah), Yvonne Lev (Associate University Librarian, Towson University), David Levy (Professor, U. of Washington Information School), John McDonald (Acquisitions Librarian, California Institute of Technology), T. Scott Plutchak (Director, Lister Hill Library of Health Sciences), Abby Smith (Director of Programs, Council on Library and Information Resources), David Stern (Director of Science Libraries and Information Services, Yale University), and Sarah Thomas (University Librarian, Cornell University).

Some of the hot topics under discussion:

Portals — Is there a role for libraries? How can the library maintain its role as the gateway to information?

Said honors senior student David Lyle: “I don’t use the library Website. It’s too confusing. I go to Google.”

Pricing models — “Bundled” pricing isn’t working for libraries. They do not like being forced to purchase titles that they do not want. “Pay per view” isn’t working for publishers who need to maintain their revenue stream. Neither does “free.”

Said one librarian: “We need a new pricing model. There are so many good electronic products. Many of us just can’t afford to pay for both print and electronic access. And we certainly can’t afford to buy everything good that is out there.”

Budgets — Library budgets are being stretched beyond institutional funding sources and there is more and more information to buy. Grants and donations are being actively pursued.

Said one librarian: “It’s time to return to the collection development model of purchasing. We can’t buy everything that is out there. We need to choose what we are buying carefully, the way we used to do.”

Print versus online — Only 12% of libraries have given up paper subscriptions. Neither document delivery nor interlibrary loan has proved a suitable response to the need for quick, reliable information delivery.

Said one speaker: “80% of the 5,500 electronic journals in OhioLink have been used at some point. ... In the future 90% of serials will be bought in consortia arrangements and most paper subscriptions will be moved to storage.”

Usage — End users like desktop delivery of full-text articles, but how can libraries know if a particular online resource is really worth the money that the library is paying? Usage statistics are difficult to compile, compare, and interpret, but some sort of statistical base for comparison is necessary.

Said one librarian: “It’s impossible to get good data on use in the electronic environment, but I’m not sure that we ever had good data even about print. We know if someone looks at a book, an article, or a journal, but we don’t know if they really read it or use it.”

Archiving — Electronic information is no longer a novelty. Librarians and publishers are concerned about persistence of electronic information and whether or not it will survive for future generations. Are institutional repositories the answer? Should research libraries plan to collect in specific areas? Should the government fund archiving?

Said one librarian: “I am astounded that the national libraries, especially in the United States, have not taken the lead in archiving. Part of the mission of libraries is to preserve information for posterity.”

Open Access — A number of sessions debated the relative merits of this new approach to journal publishing and scholarly communication, with both librarians and publishers advocating support of experimentation.

One debate focused purely on the “author fee” now being assessed: \$500, \$1,500, \$2,500, \$5,000—what’s the right number? And what will the author or institution bear?

The Charleston Conference Website — <http://www.katina.info/conference/> — contains PowerPoint presentations from the 2003 Conference that have been supplied by speakers. Greenwood Publishing/Libraries Unlimited will publish the proceedings of the 2004 Conference, edited by Rosann Bazirjian (Penn State University) and Vicky Speck (ABC-Clio) in the fall of 2004. Obviously, there’s plenty of fodder for future Charleston Conferences. The next Charleston Conference is November 3-6, 2004. See you there!

Coming in Future Issues

- Hot Topics from ALA Midwinter
- The Open Access Debate: What It Means
- Big Deals: Are They Fading?
- Google vs. MetaSearch Engines

2003 Charleston Advisor Preconference to The Charleston Conference

**“Serving Our Users — the Value of Usability”
by Judy Luther, Informed Strategies and Liz Kent,
Sweet Briar College, Preconference Organizers**

At the heart of user centered design is usability work which involves an iterative process of testing/redesign to determine whether the user can actually find what they seek on a particular website. Some academic librarians are using this approach to understand how students use the library's Website, while some vendors employ it in the development of their online products and services.

Nancy Newins from Randolph Macon noted that most users are novices and they have problems with the terminology used by librarians. Online bibliographic databases present major difficulties as they are generally not intuitive and tend not to be forgiving. A videotape of a student attempting to find an answer to a question demonstrated how easily they are lost on traditional Websites and brought groans from the audience.

Typical obstacles to testing are a tight schedule and limited budget. However, it doesn't take a large group to test, according to Chris Farnum, Information Architect at ProQuest Information and Learning, since "testing five users at three different points is more effective than testing 15 users at one time".

Vendors need to test directly with students who use the system, not just with librarians who make the buying decision. Renewals will increasingly be based on usage statistics that are directly affected by the usability of the product.

Mark Your Calendars: ALA Midwinter Preconference on Electronic Resources

"Taming the Electronic Tiger: Effective Management of Electronic Resources," will be offered as an all-day Preconference to ALA's Midwinter Meeting in San Diego, California, on Friday, January 9, 2004 by the American Library Association's Association of Library Collections and Technical Services (ALA ALCTS) Serials Section. The session will focus on management of electronic resources, covering technical as well as administrative matters.

Speakers include:

- Friedemann Weigel (Harrassowitz) on the topic of standards, in particular the NISO initiative on the exchange of serials subscription information as it relates to electronic journals.
- Bob Molyneux (U.S. National Commission on Libraries and Information Science (NCLIS)) on making use of user statistics.
- Richard Boss (independent library technology consultant) on ILS (Integrated Library System) solutions for managing e-resources.

A Vendor Showcase will be included. Registration information and further details about the meeting will be available on the ALCTS Website in mid-to-late September. The current URL for the symposium is http://www.ala.org/Content/NavigationMenu/ALCTS/Continuing_Education2/Events11/Midwinter_Meeting3/Effective_Management_of_Electronic_Resources.htm.

Thanks to 5th Annual Charleston Advisor Vendor Showcase Exhibitors

A special thanks to this year's exhibitors:

- Alibris
 - American Chemical Society
 - American Institute of Physics
 - American Psychological Association
 - Basch Subscriptions/ The Reference Shelf
 - BioOne
 - Bowker
 - CSA
 - Casalini Libri
 - The Charleston Advisor
 - Classical International, Inc.
 - Coutts Library Services
 - CQ Press
 - ebrary, Inc.
 - EBSCO Information Services
 - Elsevier
 - Emerald
 - Emery-Pratt Company
 - IEEE
 - Ingenta, Inc.
 - Innovative Interfaces, Inc.
 - Institute of Physics Publishing
 - The Johns Hopkins University Press
 - LexisNexis
 - Marcel Dekker, Inc.
 - The Nation Digital Archive
 - Nature Publishing Group
 - OCLC
 - Ovid
 - Oxford University Press
 - Paratext, LLC
 - Project MUSE
 - ProQuest
 - Refworks
 - Serials Solutions
 - Springer-Verlag New York, Inc.
 - Swets Blackwell Inc.
 - Wiley
 - xrefer Ltd.
 - YBP Library Services
- Hope to see you all again next year!



*Happy
Holidays*



from the Charleston Company