



The CHARLESTON REPORT

Business Insights into the Library Market

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Libraries on the Move

The British Columbia Library Association has approved a resolution that formally declares its commitment to Open Access and recommends that the BCCLA write a letter to the Canadian Premier, with copies to presidents of British Columbia post-secondary institutions, applauding local leadership in Open Access projects. Examples include the Public Knowledge Project, the CARL Institutional Repository Project, and Library and Archives Canada's Theses Canada Portal. A similar resolution will go to the Canadian Library Association at its 2005 annual general meeting. For more information, logon to www.eln.bc.ca. Posted to liblicense-1, June 22, 2004.

The University of California-Berkeley has opened its new three-story, 28,500-square-foot Jean Gray Hargrove Music Library. The library is named for a concert pianist and graduate from Berkeley's class of 1935, who donated \$4 million of the \$13 million total building cost. The library will house 50,000 video and sound recordings in addition to 180,000 books and printed compositions, ranging from world music to popular music. *Library Journal Academic News Wire*, July 27, 2004.

Verizon Communications, via the Verizon Foundation, has given ALA a \$295,000 grant toward the creation of a "Build Literacy @ your library" program, aimed at increasing the number of public libraries providing adult literacy programs and services. The new program is part of BuildLiteracy.org, which Verizon has funded since 2000. *American Libraries*, August 2004.

Citizens of Salt Lake City, Utah, have approved a \$1.7 million tax increase for the library (about \$12 a year on a \$175,000 income). The funds will be used to restore spending for books, periodicals, and audiovisual materials as well as for general operating hours and programs. These had previously been cut due to the tough economy. Circulation at the public library has increased 54% over the previous year and is three times the national U.S. average on a per capita basis. "News from the City Library," Press Release, July 28, 2004.

ERMs: The New "New Thing" in Library Systems

Library Systems over the years have introduced a wide number of non-ILS products to meet library needs. Last year's hot added product was focused toward public access in the form of federated searching and search engines. *Library Journal's* 2004 "Automated System Marketplace" article listed plenty of examples: Innovative's MetaFind, ExLibris' MetaLib, Fretwell-Downing's Zportal, and Endeavor's ENCompass, just to mention a few.

This year, Innovative Interfaces made waves when it introduced an ERM (Electronic Resource Management) module. In the *LJ* Survey, Innovative noted that it had already sold 24 of the modules by the article's April 2004 publication date. Sure enough, at this year's summer ALA, Innovative announced it had sold over 60 of the modules and ExLibris, Endeavor, Sirsi, Dynix and VTLS all announced their own ERM modules and tools. Obviously, ERMs have arrived. But what are they?

ERM systems are designed to help those in the "back room" of the library who must manage the dozens of portal applications and hundreds or even thousands of online journal title aggregator database services and e-journals. As most readers of *TCR* are aware, staff in the library and also at the vendor headquarters struggle to keep up with the vagaries of license management, renewals, legal restrictions on usage, access management, and basic good collection development information for decision-making (such as overlap analysis and duplication detection).

Most of the systems now available or announced are based on specifications developed by the Digital Library Federation (DLF) which began work in this area back in 2001. The goal of the DLF effort was to create specifications so vendors could create systems to replace the homegrown systems most academic libraries were using at the time. It is a tribute to DLF and also a statement about the need on both sides for these systems, that the DLF specifications have been used by all the large automation vendors who are offering ERM modules.

Library System vendors are not the only players offering solutions, either. Harrassowitz, Serials Solutions (now owned by ProQuest) and EBSCO, among others, are offering ERM products. The Colorado Alliance of Research Libraries is offering Gold Rush, its ERM solution <grweb.coalliance.org>.

The rapid take-up of these products clearly indicates the need for these ERM systems and their continued growth is a given in the library market. A recent *netConnect* article declared "ERM's Real Winners: Collection Managers." Many *TCR* readers are already actively participating in this field, either as library/users or vendor/developers. If any would like to send updates about their ERM experiences, *TCR* will be happy to publish your submissions.

Ed Note: For a good overview of ERMs, we recommend "Clarity in the Mist," by Greg Raschke and Suzanne Weiner, netConnect, Summer 2004. <http://www.libraryjournal.com/article/CA428134>

By the Numbers

2,030...the number of librarians at this year's BookExpo America, held in Chicago from June 4-6. Total registration was 25, 261. Library attendance was almost triple last year's level of 750. *American Libraries*, August 2004.

30%...the increase in the number of printed pages since 2003 for PNAS (Proceedings of the National Academy of Sciences of the USA) which has announced that online subscription rates will remain the same in 2005 as in 2004, while print rates will increase 5.7% due to the page increase. PNAS relies about equally on author fees and subscription fees to cover its operating costs. www.pnas.org/subscriptions.

8,000...the number of books in the cruise industry's largest onboard library, housed on the Queen Mary II, and managed by Ocean Books U.S. whose CEO, Sandy Paul, is a long-time Charleston supporter. *Library Journal*, June 15, 2004.

3%...the increase expected for most OCLC services in the next fiscal year. Announced by Jay Jordan at the OCLC President's Luncheon at ALA's summer 2004 meeting. *American Libraries*, August 2004.

30-50%...Google's experience with the jump in traffic and end-user visibility for publisher sites using full text indexing. Of note, 50% was the increase for arxiv.org (the physics preprints repository) and 30% was for a commercial scholarly publisher. Google has introduced a "first click to content" program designed for publishers. For more information, email Kiran Bapna <kiranb@google.com>.

MUSE Most Used Journals

The most-used journals in the Project MUSE database for May 2004:

1. *American Quarterly*
2. *Callaloo*
3. *New Literary History*
4. *Postmodern Culture*
5. *ELH, English Literary History*
6. *Reviews in American History*
7. *World Politics*
8. *MFS, Modern Fiction Studies*
9. *Human Rights Quarterly*
10. *Journal of Democracy*

Muse News, v.5, no.2, Summer 2004. www.jhu.edu

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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, <rleznini@charlestonco.com>, Editorial Offices, 618 South Monroe Way, Denver, CO 80209. 303-282-9706, FAX 303-282-9743, (c) Copyright 2004, The Charleston Co. All rights reserved. ISSN 1091-1863.

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Short Takes

The Wellcome Trust (UK), JISC (the Joint Information Systems Committee of the UK), and NLM (the U.S. National Library of Medicine) have announced a cooperative project to digitize the complete backfiles of several historically significant medical journals. Content from the project will be freely available on the Internet. The trust is contributing £750,000 (about \$1.36M), while JISC will provide £500,000 (about \$.9M). The NLM will manage the project, host the archive, and ensure that the digital files are preserved. Digitization will start this summer, and the first titles will go online early in 2005. *Library Journal Academic News Wire*, July 1, 2004.

ALA organizational members, including high school, public, and community college libraries, will each receive 2-5 free copies of the latest Oprah Winfrey Book Club selection, *The Heart is a Lonely Hunter* by Carson McCullers, thanks to an agreement with Oprah herself and the publishers of her book club selections. ALA has partnered with Winfrey since 1996. For more information, logon to www.ala.org and click on "join." This program is described under member benefits for organizational members.

IBM is offering free access to its software as well as course-development assistance to any university interested in broadening its computer science curricula. The move is an effort to counter the fact that most universities teach programming for Microsoft's Windows operating software and .NET software for Internet applications rather than IBM's proprietary DB2 database and Web-Sphere Internet software. As part of the offer, professors can download IBM software and courses developed by consultants in the company's services group. In some cases, IBM hardware can be used over the Internet under a "virtual loaner program." *Wall Street Journal*, July 20, 2004.

ARL (the Association of Research Libraries) and AAUP (the Association of American University Presses) have declared 2004 the "Year of the University Press." The campaign is intended to celebrate the important role university presses play in the scholarly communication process as well as to recognize the complementary roles of libraries and university presses as they work together increasingly to transform current practices, in the light of economic challenges and technological opportunities. *ARL Bi-Monthly Newsletter* 233, April 2004.

U.S. Most Literate Cities

Based on a study which used a compilation of 22 variables, including newspaper circulation per capita, magazines and professional journals published, library use (per capita), book buying and educational levels, the following cities were recently rated most literate in the U.S.

1. Minneapolis, Minnesota
2. Seattle, Washington
3. Pittsburgh, Pennsylvania
4. Madison, Wisconsin
5. Cincinnati, Ohio
6. Washington, D.C.
7. Denver, Colorado
8. Boston, Massachusetts
9. Portland, Oregon
10. San Francisco, California

USA Today, August 8, 2004.

Charleston Conference Preview!

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

The 24th Charleston Conference is coming up — November 3-6 — in Charleston, SC. For more information visit <http://www.katina.info/conference>. Here's a preview.

Preconferences will cover the Scholarly Publishing System (Michael Mabe, Carol Tenopir, and Carol Montgomery), Statistics for Librarians (Phil Davis and John McDonald), Open Access (Becky Lenzini and The Charleston Advisor), Patron-Oriented Technical Services (Rick Lugg and Ruth Fischer), How to Deal with Change in the Workplace (Tinker Massey), and Managing Serials (Buzzy Basch).

The Keynote address will be given by Michael Keller of Stanford University. Sessions will also feature Natalie Ceoney of the British Library, Victor Navasky (the Nation), Sally Morris (ALPSP), Heather Morrison (British Columbia Electronic Library Network), Jim Mouw (Univ. of Chicago), Christa Easton (Stanford), Irv Rockwood (Choice), Bill Hannay (Schiff, Hardin and Waite), Sam Trusow (University of Western Ontario), Heather Joseph (BioOne), Ann Okerson (Yale), Bonnie Zavon (HighWire), Mike Markwith (TDNet), and Bob Martin (IMLS).

Mark Your Calendars

Future Dates for Charleston Conferences

	<u>Preconferences and Vendor Showcase</u>	<u>Main Conference</u>
2004	November 3	November 4-6
2005	November 2	November 3-5
2006	November 8	November 9-11
2007	November 7	November 8-10
2008	November 5	November 6-8
2009	November 4	November 5-7
2010	November 3	November 4-6

Here are just some of the issues that will be discussed and debated:

- The Value of Information
- Internet Book Buying
- Open Access
- International Publishing
- Decline of the Monograph
- Virtual Approval Plans
- The Status of Microfilm
- Surfing Metadata
- Archiving: Print and Digital
- Are Core Lists Still Needed
- Is Copyright Still Useful
- Alternative Publishing Programs
- Changing Reading and Reading Habits
- Librarians in the 21st Century
- Fortune Telling — Predictions on the Future

See you in Charleston in November!

<http://www.katina.info/conference>

And Don't Forget

Less than five tables are left for **The Charleston Advisor Vendor Showcase**, set for November 3, 2004, at the Francis Marion Hotel in Charleston, S.C. This is the one opportunity to exhibit at the Charleston Conference and always sells out...so if you plan to join us and have not yet sent in your registration materials, please do so soon. Forms can be found at the main conference site: www.katina.info/conference.

COUNTER Offers XML

An XML DTD has been developed for the Usage Reports contained in Release 1 of the COUNTER Code of Practice. This will enable vendors to make their COUNTER compliant usage reports available as XML documents, which will in turn make it easier for customers to manipulate and merge the usage reports from different vendors. Moreover, the COUNTER XML DTD has been developed with versatility in mind. It is designed to be applicable to future Releases of the COUNTER Code of Practice and may be of use in encoding reports other than those specified by COUNTER. News Release, July 5, 2004.

In the News

EC Inquiry Puts Pressure on Elsevier

The European Commission (EC) is investigating the scientific publishing industry, and increasing its pressure on Reed Elsevier, the world's largest publisher of scientific journals. The EC claims that Europe generates more than 40% of scientific periodicals but estimates that the price of these magazines and papers has increased 10% each year over the last 10 years — well above inflation...

<http://media.guardian.co.uk/site/story/0,14173,1241729,00.html>

E-Journals Take Lion's Share of E-Resource Budgets

A recent report by ARL (the Association of Research Libraries) notes that expenditures on electronic resources between FY95 and FY02 for the typical university research library grew nearly 400% to almost \$1.4 million. During the same period the overall library materials expenditures grew 61%. Electronic journals accounted for 92% of the e-resource expenditures in FY02 and 26% of the library's overall serials expenditures, up from 5% in FY95. Expenditures on electronic books or other one-time purchases account for less than 4% of current monographic expenditures.

ARL Bimonthly Report 235, August 2004
<http://www.arl.org/newsltr/235/snapshot.html>

ALA Summer in Orlando: Hot Topics

And it was hot (literally) in Orlando, according to the 19,731 who attended. Registration was down from the 2002 summer meeting in Atlanta (21,130) but certainly up from the SARS-afflicted combined ALA/CLA Toronto meeting of 2003 (17,570).

With thanks to John Riley <jdriley@comcast.net> and Linda Crismond (BWI), here's a run-down of hot topics and events from the meeting.

- Books really were a hot topic since so many political books were getting published and bypassing the electronic media. Conclusion: books are good.
- Is ALA not political enough or too political? The showing of Michael Moore's "Fahrenheit 911" drew a giant crowd. Conclusion: you can't avoid politics anymore.
- ERM (Electronic Resource Management) was hot. (See *TCR's* special report in this issue.)
- More adult authors are appearing at ALA. Is ALA becoming more like BookExpo America? Over 2,000 librarians attended BEA in Chicago (see *By the Numbers* for the exact count!)
- Meetings were hard to get to. Remember Miami? Lots of us had to take expensive cabs to get to meetings. Weather was very hot (95) and humid every day. Orlando is the "griddle" of Florida. As a vendor it wasn't bad, since the Convention Center was comfortably air-conditioned. Could have been a draw for librarians who didn't want to spend too much time outside.
- Managing Your Library (PR for libraries) meeting was hot: 205 attendees.
- The "Open Access, Open Minds" meeting led by Lawrence Lessing (Information Commons advocate) was hot.
- "For Love or Money" video on library salaries was hot. Made by APA on a \$45k budget.
- Storing back issues of journals was hot.
- Digitizing archives is getting to be common.
- Libraries buying more out-of-print: "retrospective collection development".
- Cyber Cafes are very common now.
- Budgets are flat almost everywhere. Turnaround in 2007?
- More Technical Services librarians are moving into Directorships.
- Hot question: Accreditation/certification: do e-journals count?
- Self-check functionality is being expanded
- More downloadable databases are available.
- The number of providers of RFID has greatly expanded.
- Librarians felt more welcome at the smaller vendor booths. The larger companies and high tech organizations seemed to be more inward focused.
- Interest for ebooks in public libraries has been revived. Many librarians expressed an interest in the offerings of elibrary, Overdrive, and Follett's BWI.

Don't Miss This!

The much-discussed result of the U.K. House of Commons' Science and Technology Committee's seven month inquiry into scientific publishing and Open Access was released on July 20, 2004. The 118-page report, "*Scientific Publications: Free for all?*" is available in full text at <http://www.publications.parliament.uk/pa/cm200304/cmselect/cmsctech/399/39902.htm>.

TCR Profile: Infosources Publishing — Helping Librarians Keep Up

The Informed Librarian Online (www.informedlibrarian.com), the newest offering from Infosources Publishing (www.infosourcespub.com), is an innovative way to help information professionals keep up with their professional reading.

Each month, The Informed Librarian Online brings a compilation of the most recent tables of contents from over 275 titles to the desktop of the librarian. Valuable domestic and foreign library and information-related journals, e-journals, magazines, e-magazines, newsletters and e-newsletters are included. Many articles offer links to full-text. Special content is also available at the site, written for The Informed Librarian Online user, and noteworthy articles are highlighted. Restricted content from other publishers is also available every month to readers, with more on the way. A search module will soon be ready for Beta-testing, to help librarians and others find current articles in the library literature. Free subscriptions to the service are available, as well as Premium Memberships.

Founded by librarian Arlene Eis in 1981, Infosources Publishing has been providing librarians with basic reference sources for 23 years. The main focus of the publisher has been legal reference materials, updated annually. The three directories: *Legal Looseleaves in Print*, *Legal Newsletters in Print*, and the *Directory of Law-Related CD-ROMs* each appear in print and also are combined into the "LawTRIO" Law Publications Database on the Web, which enables users to search through 7,600 different legal titles. Free trials are available.

Other publications include *The Legal Researcher's Desk Reference* and *The Internet Guide for the Legal Researcher*. Both have Web components for subscribers and are continuously updated.

The publisher is open to suggestions for new titles and services for librarians and offers opportunities for librarians to publish their writing. Short pieces on topics of interest to librarians are published monthly as a "Guest Forum" in The Informed Librarian Online. Book ideas by authors are also considered for publication. To write for Infosources, contact the publisher at <arlene@infosourcespub.com>.

Coming in Future Issues

- *Charleston Advisor* Best and Worst Awards
- Updates on the Open Access Debate and NIH
- e-Learning and Its Impact on Library Collections
- Hot Topics from the Charleston Conference