



The CHARLESTON REPORT

Business Insights into the Library Market

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Short Takes

OCLC and Yahoo! Inc have announced a co-branded "Library Toolbar," which allows Yahoo users to narrow their search results to the WorldCat database and helps them locate libraries in their vicinity that have the record, book or document that they are looking for. To access WorldCat's records, consumers enter a query in the search box located in the toolbar and either click the WorldCat logo or use the drop-down menu that features a "libraries" link. Consumers will then be prompted for their zip code to determine if the library materials they are looking for are available in a nearby library. The project is a part of OCLC's OpenWorldCat, which recently received *The Charleston Advisor's* 2004 Award for Best New End-User Product. For more information, logon to www.oclc.org/news/default.htm.

Swets Information Services has announced a partnership with INIST, the Institute of Scientific and Technical Information of CNRS, the leading French integrated scientific information center. INIST's document delivery services will be integrated into SwetsWise, Swets' online service for the procurement, access and management of subscriptions and online information. Links to The British Library, Infotrieve, CISTI, and FIZAUTODOC are already provided in SwetsWise. Swets Press Release, November 19, 2004

Accucoms BV, a new consulting company specializing in sales and marketing services for academic and professional publishers worldwide, has joined the marketplace effective June 1, 2004. Based in the Netherlands, the independent company provides inbound and outbound telemarketing services and sales operational support to publishers as well as outsourcing solutions to maintain existing business and to increase new revenues and develop new clients. Accucoms has a team of multilingual professionals specialized and trained in publisher-library relations. For more information, logon to www.accucoms.com.

Libraries on the Move

The New York Public Library has received two recent donations: \$25 million from Robert W. Wilson, an individual philanthropist, and \$5 million from the Andrew W. Mellon Foundation. Roughly \$8 million of the \$25 million will be used to support cataloging of collections at the Library for the Performing Arts, the research branch at Lincoln Center. The remaining \$17 million will be targeted to materials, technology and collection preservation at all the research libraries. The Mellon grant will be used to support the research libraries as well. NYPL also announced expanded hours and services thanks to recent additions to the library's budget from the city. *New York Times*, November 18, 2004.

The University of Wyoming (UW) Libraries have received a \$1 million alumni gift that will be used in part to create a reading room, adding a popular reading collection. Monies will also be used for professional development for library staff. The gift will be matched by the state. The University has also announced a planned expansion to its main library, a \$35.5 million construction project for a new Information, Library and Learning Center (ILLC). *Library Journal Academic News Wire*, December 7, 2004

One thousand U.S. public and school libraries are the latest to be awarded free copies of 15 classic books from the National Endowment for the Humanities (NEH) "We the People Bookshelf" project. The new awards are based on the theme of "courage" and are intended to strengthen the teaching, study and understanding of American history and culture. Applications for the next round of awards will be accepted from December 16 through February 16 and can be filed at www.ala.org/wethepeople/. A complete list of winning libraries is available at www.neh.gov/pdf/bookshelf3-2004.pdf.

The Cleveland Public Library (CPL) has received a grant from the Ohio Department of Education to install full-functioning Library Kiosks in three Cleveland neighborhood centers. The centers are part of the Neighborhood Centers Association (NCA), a membership organization providing resources and support for strengthening 28 Cleveland neighborhood centers and settlement houses. The Kiosks are intended to help increase the accessibility of technology to children attending after-school and summer programs and feature online library services including interactive library assistance from librarians via CPL's Homework Now Website. Cleveland Public Library "Speaking Volumes" Newsletter, Fall 2004.

The U.S. Institute of Museum and Library Services (IMLS) will receive \$205,951,000 in 2005, a 4.8% increase of \$7,709,000 over its previous budget. Funds will be used to build on a proposal announced by Laura Bush in 2003 to increase funding "to recruit and train a new generation of librarians" and are part of the "Consolidated Appropriations Act, 2005" signed by President George W. Bush. IMLS "21st Century Librarian" grant awards are part of a plan to help offset a predicted national shortage of librarians. Grants support scholarships for graduate students in library and information science, distance learning technology, and recruitment of librarians with diverse language skills. For more information, visit: <http://www.ims.gov>.

In the News

Two new services from Google have dominated library and information news in November and December.

- **Google Web Library** is the terminology being applied to Google's dramatic announcement in December that it has reached agreements with at least five major libraries to digitize books in their collections and make them available online. According to reports, the complete collections (out of copyright only) of Stanford and Michigan will be scanned, along with 40,000 volumes from Harvard, fragile materials from the New York Public Library and an unspecified number of books published prior to 1900 from the Bodleian Library at Oxford.
- **Google Scholar**, a new search service aimed at scientists and academic researchers, was announced in November 2004. Available at scholar.google.com, the service is a result of the company's collaboration with a number of scientific and academic publishers and is intended as a first stop for researchers looking for scholarly literature including peer-reviewed papers, books, abstracts and technical reports. Reviews of the product are just starting to appear and will be summarized in future issues of *The Charleston Report* and *The Charleston Advisor*.

Summarized from write-ups in the *New York Times*, November 18 (<http://www.nytimes.com/2004/11/18/technology/18google.html>) and December 14, 2004 (<http://www.nytimes.com/2004/12/14/technology/14cnd-goog.html>).

Mark Your Calendars!

"Virtual Reference 101" will be offered on Friday afternoon, January 14, 2005, as part of the American Library Association's Midwinter Meeting in Boston, Massachusetts. The session is sponsored by RUSA, the Reference and User Services Association of ALA and will feature an overview of Web-based interactive references services, with live demonstrations and discussions.

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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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By the Numbers

\$853 million...the total of spending for online content in the first half of 2004, up 14% over the same period in 2003. http://www.onlinepublishers.org/pdf/lopa_paid_content_report_nov_04.pdf

6%...the increase in circulation levels at U.S. public libraries from 2002 to 2003. *American Libraries*, November 2004.

214...the average number of U.S. library building projects per year over the past 34 years. Of note, the average is 219 for the past eight years, a 2% increase. *Library Journal*, December 2004.

11%...the increase in college tuition at four-year U.S. public universities—to \$5,132 on average for a single year. By comparison, a year at a private university is \$20,082, up 5.7%. *Wall Street Journal*, October 20, 2004.

\$38,273...the average salary in 2003 of a library professional working for a vendor. Of note, the average salary of a job assignment classified as "Info Consultant" was \$53,542 (with a reported high of \$80,000), of a "Web Services" professional \$62,500 (high of \$94,000). *Library Journal Salary Survey*, October 15, 2004.

Did You Know?

Dictionary publisher Merriam-Webster says "blog" topped the list of most looked-up terms on its Web site during the last 12 months. The word will now appear in the 2005 print version of Merriam-Webster's dictionary and is defined as "a Web site that contains an online personal journal with reflections, comments and often hyperlinks." However, Oxford University Press says "blog" is already included in some print versions of its *Oxford English Dictionary* and has entered mainstream usage. According to the Pew Internet & American Life project, a blog is created every 5.8 seconds, and blog analysis firm Technorati estimates that the number of blogs in existence now exceeds 4.9 million.

Read the full story on BBC News <http://news.bbc.co.uk/2/hi/technology/4059291.stm>

Reported in *OCLC ABSTRACTS*, December 6, 2004 (Vol. 7, No. 49)

Retreating From the Big Deal

"...what is to be done when the financial commitment to the Big Deal is no longer sustainable?" A recent article from Jeffrey Gatten, Dean of Library and Information Resources, California Institute of the Arts, and Tom Sanville, Executive Director, OhioLINK, suggests that "...an orderly retreat based on the ranking of articles-downloaded aggregated across member institutions appears to be a reasonable method to employ if needed. This method simplifies the process, allows for quick decision-making, and minimizes the impact on users throughout the consortium. An effective orderly retreat means consortia have the ability to manage a Big Deal based on a 'cost for content' approach."

The full article, entitled "An Orderly Retreat from the Big Deal: Is It Possible for Consortia?" is available in full text from *D-Lib Magazine*, 10(10). October 2004. <http://www.dlib.org/dlib/october04/gatten/10gatten.html>

Hot Topics from the Charleston Conference

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

The **2004 Charleston Conference** had a record 888 attendees! Librarians, publishers, and vendors from Norway, Hong Kong, Germany, England, France and Australia mixed with their counterparts from all of the states in the United States. Over 19 speakers conducted 6 preconferences dealing with the journals revolution, statistics for librarians, changing change, Open Access, managing serials, and patron-oriented technical services. For the main conference, there were 120 papers given by over 200 speakers on topics as diverse as virtual reference and database evaluation. Said one of the CEO attendees, “There’s no point in going to any other conference. Charleston is the place where new networks are built and new ideas are born. It’s a friendly and laid back atmosphere. I’ll be back next year.”

There were many hotly debated topics. Here are just a few of them.

Books — both print and e. Believe it or not, even though the theme of this year’s conference was “All the World’s A Serial,” books were the topics of at least nine panels. Are core lists of use any more? Yes, definitely. Are libraries buying print books anymore? Yes, enthusiastically. Are they still using traditional booksellers? Yes, though many have branched out into Internet bookstores and other competitors. As John Krafty of R.R. Bowker said in one of the presentations, “... the number of books published in 2003 was 175,000 — a record high — and represented a 20% increase over 2002 numbers.”

Consortia buyers’ clubs, and customization. Some of the larger libraries have abandoned the “big deal” in favor of customized packages of journals and books. Smaller and medium-sized libraries have gained access to much more material by virtue of the “big deal” and the trend these days is to continue the consortial arrangements with more customization of holdings. Tim Bucknall, UNC-Greensboro, discussed a recent grassroots buyers’ club in the Carolinas.

Linking and Electronic Resource Management systems. These days this is at the top of most librarians’ screens. With all these newfangled electronic resources, as Lyman Newlin would say, librarians are seeking to continue to provide services for both print materials, their specialty in the past, as well as the myriad electronic resources that are emerging. What’s the best way to link and provide full text access to these resources? As one approach, Adam Chandler of Cornell discussed the DLF ERM Initiative. www.library.cornell.edu/icts/elicensestudy/

Discarding of print materials. Library users love full text electronic resources and many will not consult the print collections, especially in undergraduate institutions. Accordingly, the trend to discard runs of print resources (indexes especially) when they become available online is a growing one. By the same token, there are some librarians who are not ready to abandon print because of its archival value. The decision seems to be based largely on space considerations.

Open Access. Open Access was debated everywhere. George Porter, Cal Tech, discussed how and whether or not libraries are taking advantage of the more than 1,200 refereed journals free for the taking. Of particular interest was the Springer Open Choice model which Derk Haank, CEO of Springer, explained in detail.

Core lists. Are they still necessary? At least four panels discussed the need for such lists, the most efficient way to produce them and the types of libraries and lists that are available.

Perpetual access. Librarians are frustrated with the fact that even electronic book resources are becoming serial like in terms of yearly expenditures. Many libraries are making big one-time purchases of materials (such as the *New York Times* online) so as to ease the strain on the serials budget. Still, annual fees remain.

On demand publishing and other changing publishing models. A packed room heard Mitchell Davis of BookSurge discuss how print-on-demand has changed the economics of keeping a book in print.

Google. J. L. Needham of Google spoke at the Conference about many of Google’s new initiatives given their new IPO. Google was one of the most frequently used words at the Conference.

This is just a very brief overview. The Charleston Conference was loaded with topics and information. To get a glimpse of just a few of the powerpoints from the Conference visit <http://www.katina.info/conference/>. Greenwood Press/Libraries Unlimited will publish the Proceedings of the complete conference in the fall of 2005. There will also be brief reports from the Conference in upcoming issues of *Against the Grain*, <http://www.against-the-grain.com/>.

Be sure to mark your calendars for the **2005 Charleston Conference** — November 2 (Preconferences and Vendor Showcase), November 3-5 (Main Conference). See you there!

TCR Quote

“We have \$8 million we were going to throw into a new OPAC. We were already wondering why we should do this. And then, with announcements like this, you really have to wonder. Why do this if all our users are going to use Google anyway?”

Dennis Dillon, Associate University Librarian at the University of Texas at Austin, reacting to news of Google’s plans to digitize major library collections. Quoted in *Library Journal Academic News Wire*, December 16, 2004

Don’t Miss This!

“A Comparative Review of Elsevier’s Scopus and ISI’s Web of Science (2004 version)” from the Charleston Conference’s own David Goodman and co-author Louise Deis, in the January 2005 issue of *The Charleston Advisor*. Full text available in mid-January at www.charlestonco.com.

Hot Topics at the Frankfurt Book Fair, October 2004

... Reported by John Cox, John Cox Associates

Ed Note: Topics below are summarized by your editor. The complete report appears in the January 2005 issue of The Charleston Advisor, full text available at www.charleston.co.com.

- **Open Access** continues to give journal publishers cause for concern. This year's STM meeting was largely devoted to the subject. It is clear that most authors do not care one way or the other. There is considerable admiration for Springer in announcing Springer Open Choice, which provides authors with the option of paying \$3,000 to publish on an Open Access basis or publish in the usual, subscription-based manner. Many publishers are experimenting with Open Access on individual titles. The general feeling is that Open Access journals have yet to subvert conventional journal publishing. But Open Access via institutional repositories or discipline-based repositories is still an unknown quantity, and may prove to be a more sustainable challenge.
- **Swets Information Services'** new management spent much of the Fair reassuring publishers that Swets' financial position is secure, and that Swets is committed to investing in electronic services and in further company restructuring. Being a subscription agency has always been a low-margin activity. Publishers are dealing directly with libraries and library consortia for online journal content. Subscription agents have found it very difficult to become selling partners for publishers while retaining their traditional role in the print world of providing a one-stop shop for a library's serials acquisitions.
- **Google Print** was launched in person by Larry Page and Sergey Brin, the founders of Google, at the Fair on Thursday, October 7. Google Print is very impressive, and it will dramatically enhance the breadth and quality of information on the Internet. Google has been developing this system and consulting publishers since early 2004. Companies as varied as children's publisher Scholastic and trade publisher Penguin are participating. The company announced that the scholarly and professional publishers already involved include Pearson, Wiley, Taylor & Francis, CUP and OUP. The announcement caused much excitement at Frankfurt and may well be as significant to book publishing as the launch of Amazon.com. (*Ed Note: For more details on Google Print, see TCR v.9, no.2, and don't miss more Google announcements in this issue.*)

Top U.S. Library Stories of 2004

American Libraries, the journal of the American Library Association, has just published its summary of the top stories of the year. Among them are the following:

1. Building projects going strong... of note, the new \$165.5 million Seattle Public Library that met with rave reviews.
2. Cuts, layoffs and shutdowns... examples include the layoff of 21 staff at the Providence, RI Public Library and closures of three branches in Salinas, California.
3. Privacy issues... with U.S. libraries becoming practically militant in their efforts to modify sections of the USA Patriot Act.
4. RFID (radio frequency identification devices) technology... becoming widely accepted in libraries nationwide as a way to speed circulation procedures. Among the adopters is the San Francisco Public Library.

American Libraries, December 2004.

Creative Funding in Public Libraries

A study by the Urban Library Council (ULC) finds more and more public libraries in the U.S. offering non-traditional services to augment funding from state and federal sources.

- In-library bookstores
- Coffee shops
- Contracted Internet services
- Fee-based business information
- Lawyer referral services
- Digitalized photo sales
- Patent services
- Online stores
- Space rental

Reported in *Library Journal*, November 2004. For the full report, logon to <http://www.urbanlibraries.org/GovernanceRevenueReport.html>.

Coming in Future Issues

- Open URL: Opportunities for Improving Service
- Hot Topics from ALA Midwinter
- Google Scholar: Critical Reviews
- Updates on Open Access, NIH and More

Happy Holidays from the
Charleston Company