The CHARLESTON REPORT
Business Insights into the Library Market

Short Takes

The Association of American Publishers (AAP) and the American Library Association (ALA) have released a joint White Paper promoting the usage capabilities in Digital Rights Management (DRM) products for eBooks that publishers, librarians, and researchers say are most needed in order to satisfy consumers. The White Paper is intended to provide guidance to vendors and publishers as they build and improve DRM products for the industry. To view and download the White Paper, visit AAP's Website at *http://www.publishers. org/press/pdf/DRMWhitePaper.pdf*.

Barnes&Noble.com has introduced The Library Bookstore, catering to library purchasing of books and other materials. According to reports, B&N has long served corporate library customers and others and is taking a more pro-active approach to services for the library market. The service is offering free shipping of two or more items, and is also offering a special 5% discount through July 31, 2003, in honor of SLA in New York and ALA in Toronto. To check out the service, logon to *www. bnbusiness.com/library*.

"Free shipping" has had a huge impact on ordering on Amazon, said CEO Jeff Bezos, at the company's annual meeting in Seattle. In fact, Bezos claims he would have offered free shipping much earlier in the company's history had he understood the positive impact the offer has had on sales. Of note, Bezos also reported that third-party sales now represent roughly 19% of total revenue. In addition, he noted that sales outside the U.S. are strong, particularly in Germany and the U.K. *Wall St. Journal*, May 29, 2003.

Libraries on the Move

Solinet has recently presented three Outstanding Library Programs Awards. Winners are the Orange County (FL) Library System, for its Spectrum program which offers new staff the chance to rotate through management support positions in different departments and branches; the Pulaski County (VA) Library System, in conjunction with the Pulaski County Public Library & School System, for the development of the "Virtual Library Card" to provide all county residents with access to databases and other electronic reference materials provided by the Library of Virginia; and VIVA's "Virginia Heritage Project," initiated in 1997, which provides access to 400 years of African American history in Virginia. *Solinet Press Release*, May 28, 2003.

Los Angeles' Loyola Marymount University has received $20 million for a new university library from two foundations established by local real estate developer and philanthropist William Hannon. The donations are the largest toward the new William Hannon Library, a project of roughly $44 million. The new library will include collaborative study spaces, a 24-hour study room, and other special areas designated for group use of music and video materials. Plans call for an automated storage and retrieval system (ASRS) to be installed, allowing the library to house nearly 1.5 million items with its high-density storage facility. Hannon, who died in 1999, was a 1937 alumnus, a Regent Emeritus, and an Honorary Trustee of Loyola Marymount. *Library Journal Academic News Wire*, May 20, 2003

Lund University in Sweden has announced the official launch of the Directory of Open Access Journals (DOAJ), supported by the Information Program of the Open Society Institute, and the Scholarly Publishing and Academic Resources Coalition (SPARC). The directory contains information about 350 open access journals freely available on the web. The service plans to expand to include all open access scholarly journals that use an "appropriate quality control system," such as those supplied by peer-review, accreditation, and editorial boards, and will be open to journals in all languages and subject areas. To recommend a journal for inclusion in the directory, send email to *www.doaj.org/suggest*. For information about how to obtain DOAJ records for use in a library catalog or other service, visit *www.doaj.org/articles/questions/#metadata*.

The School of Information and Library Science at the University of North Carolina-Chapel Hill (UNC-CH) has recognized the first graduates from its undergraduate degree program in information science. The bachelor's degree in information science (BSIS) was first offered in the fall of 2002, springing from the success of the school's undergraduate minor in information systems which was introduced in 1997 and has proven to be very popular. Meanwhile, in Baltimore, John Hopkins University (JHU) has introduced a Master's degree in Digital Libraries as a new concentration within its MA programs in Communications. UNC-CH SILS *News Release*, May 27, 2003, and *netConnect*, Spring 2003.

The New York Public Library has launched a live, online reference service in Spanish. The country's first Spanish-language chat service is being offered from 9 a.m. - 9 p.m. and is provided by LSSI's Servicios de Referencia en Espanol. LSSI expects to add Cleveland's Public Library to the service in the near future. For more information about NYPL's offering, logon to *preguntas.nypl.org*.

The University of North Carolina at Greensboro (UNCG) has received a $1 million gift which will endow the library's Special Collections and University Archives. University officials said the gift will allow the library "to expand and preserve its collections; undertake special projects, such as gathering oral histories; and provide greater access to scholars by converting more books and documents to digital formats." The gift was presented from two children of former North Carolina First Lady Martha Blakeney Hodges. *Library Journal Academic News Wire*, April 22, 2003

MARK YOUR CALENDARS:
Two Upcoming UK Seminars

"Learning from Users" — July 4, 2003
Chair: Richard Gedye, Oxford University Press

Understanding what users do and what they want is critical to developing successful print and electronic information products and services. Publishers need to know who their users are, how they find and use information, and how they behave when faced with choices. Many research studies have been done to document how users behave; much can also be learned from the electronic logs of what users actually do. This seminar summarizes in a practical way what we know about user behavior and what publishers can do to learn more about their own users. Further details can be found at: *www.alpsp.org/s040703.htm*.

"Journal Development" — September 23, 2003
Chair: Leon Heward-Mills, Thomas Telford

This full day seminar will examine how learned, professional, and society journals have been changed successfully to meet the needs of readers, authors, subscribers, and societies. Presentations and case studies focus on various elements of journal development such as editorial, electronic, online and marketing. Further details can be found at *www.alpsp.org/s230903.htm*.

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By the Numbers

55%...the number of all searches on the World Wide Web conducted by Google. *New York Times*, May 18, 2003.

$1.1 billion...the amount of royalties and fees from discoveries licensed to commercial companies in FY 2001 by US and Canadian universities, teaching hospitals, and research institutions, according to the latest survey from the Association of University Technology Managers (AUTM). *www.biomedcentral.com/news/20030527/01*

1/3...(or 48 million) of 141 million U.S. full-time workers are now classified as "knowledge workers" by the Bureau of Labor Statistics, meaning that they are white-collar workers who read information regularly in the course of the their jobs. Edward Colleran in ***Against the Grain***, April 2003.

39%...is the value of ongoing customer maintenance toward total revenue for integrated library systems (ILS) companies, on average. *Library Journal's* Annual Automated System Marketplace Survey, April 1, 2003.

43 million...the number of U.S. users connected to the Internet in May 2003 who used file-sharing software to copy music without paying for it, according to the NPD Group, a market research firm. *New York Times*, June 8, 2003.

1.8%...the average annual increase in salary for U.S. and Canadian ARL librarians, according to the ARL Annual Salary Survey. Of note, the proportion of funds allocated to materials and operating expenditures is increasing faster than salaries in these institutions. *Library Hotline*, March 31, 2003.

2,000...the largest number of books or packages delivered in a single day via same-day service by Barnes & Noble in New York City. Roughly 400,000 items have been delivered same-day since May 2000. *Wall Street Journal*, April 28, 2003.

Top 10 Best Read eBooks

Questia's monthly list shows the following as top ranked for usage in the month of May 2003.

1. *Domestic Violence: Facts and Fallacies*, by Richard L. Davis, Author. Praeger Publishers, 1998.
2. *Leadership for the Twenty-First Century*, by Joseph C. Rost, Author. Praeger Publishers, 1993.
3. *A Time for War: The United States and Vietnam*, 1941-1975, by Robert D. Schulzinger, Author. Oxford University Press, 1998.
4. *Buddhism: A Very Short Introduction*, by Damien Keown . Oxford University Press, 1996.
5. *The Ethics of Human Cloning*, by Leon R. Kass, Author; James Q. Wilson, Author. American Enterprise Institute, 1998.
6. *Marijuana*, by Erich Goode, Editor. Atherton, 1969.
7. *The Affirmative Action Debate*, by George E. Curry, Editor. Addison-Wesley, 1996.
8. *Culture and Customs of Japan*, by Noriko Kamachi, Author; Hanchao Lu, Editor. Greenwood Press, 1999.
9. *Capital Punishment in the United States: A Documentary History*, by Cynthia Morris, Editor; Bryan Vila, Editor. Greenwood Press, 1997.
10. *The World of the Autistic Child: Understanding and Treating Autistic Spectrum Disorders*, by Bryna Siegel, Author. Oxford University Press, 1996.

Source: *www.questia.com/top20ebooks/top20ebooks.html*.

Building Collaborative College Library Research Collections

Balancing space issues, digital collections, and print collections in tight budgets is an ongoing effort for libraries both in the U.S. and internationally. A recent Mellon-funded study examines possibilities for three colleges in the Philadelphia area (Bryn Mawr, Haverford, and Swarthmore) to work collaboratively to achieve a number of goals, including:

- to reduce duplication of items and weed low-use material
- to add compact shelving and off-site storage
- to explore digital formats to reduce space needs
- to buy cooperatively to save money
- to create a joint collection superior to that which each school could offer individually.

While the following findings are specific to these three institutions, the general trends are relevant to all *TCR* readers.

Collections Acquisition and Use

- Three-fourths of the books in the colleges' collections rarely circulated, and more than half the volumes had not been checked out in 10 years.
- 40% of the titles were held by more than one school's library.
- In the most recent academic year, 80% of purchases by any one of the three schools through its approval program duplicated purchases of at least one other consortium member.
- From 20% to 37% of borrowings were crossing college borders.

Electronic-publishing Trends

- Although eBooks are not yet a viable substitute for traditional books, users value them as references, reserve readings, and browsing copies.
- Libraries buy many traditional books at the time they are published because they fear the books will soon go out of print. Print-on-demand, if publishers adopt it, might reduce the need to purchase books for this reason.
- If they believe an e-journal publisher is reliable, libraries might gain space by eliminating duplicate print copies.

Student and Faculty Use

- Unless electronic browsing capabilities and the quantity of e-texts can be increased, students and faculty will continue to want to browse books on shelves.
- Decisions to reduce duplicates must take into account on-campus needs for books that provide immediate class support.
- The extent of use of electronic information varies significantly among the academic disciplines. An awareness of these differences must be a key factor in acquisition decisions.

Space-saving Options

- Libraries are gaining space by switching to digital from paper reference works, government documents, and journals. These space savings are occurring faster in the sciences than in the social sciences and humanities.
- Weeding duplicate copies that have not circulated in more than a decade can save space; however, the effort may entail substantial labor costs. More important, it requires close consultation with faculty.

A Possible New Model

The three colleges are considering creating an integrated research collection from their separate liberal arts collections. They think the following areas are most important for collaborative resolution:

- resolving differences in decisions about collection development
- coordinating acquisition-approval plans
- developing central management and faculty communications for weeding
- improving virtual browsing as a substitute for shelf browsing

These summary findings are reported by Judy Luther, Linda Bills, Amy McColl, Norm Medeiros, Amy Morrison, Eric Pumroy, and Peggy Seiden. The full text of the report is available free of charge at *www.clir.org/pubs/abstract/pub115abst.html*.

Did You Know?

Scholarly Information Strategies (*www.scholinfo.com*) is now offering a Conference Report Service designed with publishers, industry intermediaries, and librarians in mind. The service allows small and medium-sized organizations to keep up with conferences they would not otherwise have attended, providing a brief digest of the key issues arising out of various meetings. Both what is said in the sessions and presentations and, where appropriate, the key topics of conversation outside of the main sessions are reported. In addition, an assessment is provided of each key issue along with how others at the conference reacted. To learn more, logon to *www.scholinfo.com/reports/conferencereports.htm*.

For a free sample report, including the Council of Science Editors Conference in Pittsburgh, the ALPSP "Who pays for the Free Lunch" seminar in London, and the United Kingdom Serials Group conference in Edinburgh, logon to *www.scholinfo.com/reports/confcovered.htm*.

Don't Miss This!

The Charleston Advisor's Third Annual "Best and Worst" Readers' Choice Awards will be published in our July 2003 issue (v.5, no.1). Categories for awards include:

- Best New Product
- Most Improved Product
- Best Interface
- Best Content
- Best Pricing
- Best Contract Options
- Best Customer Support
- Best Effort
- Best Vaporware
- The Lemon Award

Awards are based on input from readers via the TCA web site at *www.charlestonco.com* or directly to the Managing Editor at <george@coalliance.org>, as well as recommendations and suggestions from the *TCA* Editorial Board.

Hot Topics from ACRL

ACRL's 11th National Conference: "Learning to Make a Difference," *April 10-13, 2003,* in *Charlotte, North Carolina*, drew record-breaking attendance of nearly 3,500—up 14% from the previous national conference held in Denver in March 2001. Following are some of the "Hot Topics" that were under discussion. You will recognize some as old favorites, some as recurring topics, and some as entirely new.

Budgets — Many, if not most, library budgets have been cut or are remaining static for the next fiscal year. Accordingly, librarians are scrambling to justify increases (or minimize decreases), looking for fund-raising opportunities, tapping endowments, or creating them if they do not exist.

Library as Place — Much more attention is being paid to the design of comfortable spaces in libraries. Drawing on what has worked in popular bookstores, libraries are striving to replicate the design. Once forbidden, coffee shops and eating and drinking in libraries are welcome.

Training and Recruiting of Library Staff and Librarians — With a significant number of librarians set to retire in the first decade of the twenty-first century, a popular topic is the recruiting and training of paraprofessional and professional staff. The need to continue the library tradition is necessary and prudent.

Open URL and **SFX technology** was under much discussion. The ability to link articles or sections of books is one of the features of the electronic environment that drives use. There is much competition and there are many new products that continue to stir up the marketplace.

Use and usability — As more and more electronic databases become available, the necessity of canceling some that have not received use in relation to their cost is becoming paramount. While use statistics are difficult to compare, more work is being done (especially by Project COUNTER) to make statistics more scalable. The usability and design of such databases is, obviously, of paramount importance.

Technical Services Repositioning — The "customer service" part of technical services, that is, how technical services serves the public services function was under discussion. Also included were assessment of overall library services, collaborative collection development, and partnering with vendors to deliver better service.

Research by undergraduates — Has use changed in the online environment? **Phil Davis** (Life Sciences Bibliographer, Cornell University) has done considerable longitudinal studies on this important topic. *http://www.ala.org/Content/NavigationMenu/ ACRL/Events_and_Conferences/pdavis.pdf. (Ed Note: We are pleased that Phil will be speaker the upcoming 5th Fiesole Collection Development Retreat in Oxford, England. Be sure to watch for our report on this meeting in our next issue of **TCR**.)*

Best Practice — This "buzz term" was in wide use. What is the benchmark for needed services? There are many libraries at work on these efforts.

All eJournal collections — The entire eJournal collection at Drexel was the subject of a session by Carol Hansen Montgomery and Donald W. King. Since use is greatly enhanced by electronic availability, this is an approach that is attractive to many libraries. *http://www.ala.org/Content/NavigationMenu/ ACRL/Events_and_Conferences/hansen.pdf.*

Issues in the Electronic Environment, especially **Copyright** and **Fair Use** and **Information Literacy** — Many librarians point to the "Disney-fication" of intellectual property. Much of what is being produced and used by end users is not of the sophisticated, scholarly variety. And there is still the problem of **archiving** in and of the electronic environment. While there are many initiatives (mirror sites, LOCKSS, OCLC, Mellon), archiving as libraries have known it for centuries is becoming problematic.

eBooks are making a comeback in the form of aggregated Reference collection databases. As always, critical mass is crucial and many collections are publisher-specific, not as popular with the library community.

Individual sessions receiving special mention included:

- The **information commons** panel presented on April 12th featured panelists from nine information commons sites across the U.S. (the University of Southern California, Emory University, Colorado State University, UNC-Charlotte, Brookdale Community College, Elon University, the University of Arizona and Belmont Abbey College) and drew an audience of around 350 librarians. Materials from the session are available at library.uncc.edu/infocommons.

- "Can we **encourage learning by shaping environment**?" The session on patterns of seating behavior in undergraduates by Virginia Young on April 11th took an anthropological look at how students (men and women) use and interact with space, with some very concrete suggestions for layout and design of library seating.

- "**Scholarly Communication:** Taking stock, charting next steps," by Ray English, Jean Claude Guideon, James Neal, and David Shulenberger was held on April 12th. Presenters focused on Open-Access publishing as a competitor and viable alternative in the scholarly dissemination process.

- A standing room only session, "Focus on the Future: **Top Issues** for Academic Libraries," featured the directors of leading library organizations talking about trends, initiatives, and values.

For a more detailed look at the presentations from **ACRL**, visit *http://www.ala.org/Content/NavigationMenu/ACRL/Events_ and_Conferences/ACRLs_11th_National_Conference.htm.*

TCR Quotes

"What people like is [quick], big, and always 'in the air' [available]. People are not looking for more bells and whistles—they want more content, and fast." Derk Haank, CEO, Elsevier Science, remarks from a recent NFAIS meeting, quoted by Carol Tenopir in *Library Journal*, May 1, 2003.

Coming in Future Issues

— Hot Topics from ALA in Toronto

— Report from the 5th Fiesole Collection Retreat in Oxford

— "Informationists"—the New Role for Libraries in Medicine

— A Profile of OCLC's Gates Portal Project