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ATG Annual Survey Report

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with a mandate to learn about, develop, and nurture these sorts of projects.

Evolution

It has been less than ten years since the ACS put its first journal articles online, and it is remarkable how substantial the transition has been and how it continues to evolve. The act of delivering a fairly simple PDF file has transformed into a hyperlinked, dynamic, community-based experience. For example, just look at Websites such as the one developed for our own *ACS Chemical Biology*, which includes not just basic research articles and commentaries (which also appear in the print version) but also wikis, blogs, interactive forums and q/a sessions — components unique to the Internet version. Perhaps that is the greatest change in all of this migration from a print-only to a Web-based environment: more opportunities for collaboration and partnership, a shift from insularity to inclusiveness.

The net result of these changes is a gain for all parties. Staff at ACS have become more aware of our business and business processes, of our journals and their histories, of our customers and their requirements. We have increased our global outreach by establishing new editorial offices and reaching out to millions of new users. We have developed new tools that address the needs of our readers, our authors, our editors, and our subscribers. We have made modifications (on the fly at times) in order to take advantage of the staggering opportunities made available by technology and the advice and needs of our constituents, and built up our organization with more highly skilled people (in IT, sales/licensing, editorial/production, and customer service), new equipment, and sometimes radically-transformed work-flows. All of this has been done at considerable expense and effort, but it has resulted in a better publishing organization. And we get to spend a LOT more time in meetings, so now everyone knows everyone else's favorite pizza topping.

Change is hard, and confusing, and can cause discomfort (training new employees as well as veterans on new software and procedures is difficult). Along with librarians, subscription agents, and researchers, over the past decade publishers have experienced enormous challenges to remain viable and vibrant in the evolving world of scholarly communications. But the positive outweighs the negative when everyone accepts that dynamics are in flux both internally and externally. Rather than panic over the short-term uncertainties and difficulties, we try to look at the long-term benefits that are attainable if we manage this process with an open mind, and an eye on stabilizing and strengthening our role in the research process.

ATG Annual Survey Report

by **Leah Hinds** (Director, Evaluation & Special Projects, Charleston Information Group, LLC., Anderson, SC; Phone: 864-224-4035)
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Executive Summary

Against the Grain's Annual Survey is designed to provide readers with library information that is unavailable anywhere else. The survey is an opportunity for readers to give opinions and statistics concerning libraries and librarians around the world. Results were obtained from readers who submitted surveys electronically and by mail. 48 surveys were submitted, a number comparable with the past two years' results (49 in 2004 and 36 in 2003).

Concerns in the Industry

The first survey question dealt with the top concerns of the industry for the 21st century. The top six answers are as follows:

1. Budget decreases/price increases/contracts and pricing/journal pricing — 35 (73% of respondents)
2. Digital Preservation/archiving digital resources/preservation of all formats — 21(44% of respondents)
3. Search technology/ **Google**/Internet competition — 18 (38% of respondents)
4. Loss of experienced personnel/need more trained staff — 8 (17% of respondents)
5. Use and purpose of physical library/role of library in electronic world/decline of library — 7 (15% of respondents)
6. Restrictive copyright/copyright issues — 7 (15% of respondents)

eBooks

When asked if their library has bought eBooks, 85% of respondents said yes, and 15% said no. This is up from around 7% reported two years ago, but is a 2% decrease from last year. The budgets for eBooks varied widely, from 0 to \$65,000. The average response was \$14,133.33. 14 respondents (42%) said they have no specific budget for eBooks, and 20 (42%) people did not answer the question.

Outsourcing

Library outsourcing is most common for approval plans, with 38% or respondents claiming this. Cataloging is next in line at 27%. 19% of respondents checked the "other" category; other items outsourced include binding, foreign language materials, and link resolvers. Only two people (4%) indicated that acquisitions are outsourced. Nine respondents (19%) said they outsource none of the choices listed, and seven people (14%) did not respond.

These results are comparable with the 2003 and 2004 results, in fact almost statistically identical. The only difference is in outsourcing acquisitions; it seems to be decreasing each year (from 2002). Nine respondents (19%) said they outsource none of the choices listed, and seven people (14%) did not respond.

Downsizing

56% of respondents say their technical services operations have NOT been downsized in the past two years (down from 60% the previous year); 44% have been downsized (up 4% from last year). This is one question that everyone answered, showing the strong feelings people have on the topic.

The specifics of the downsizing are as follows:

- Professional staff decrease — 8 (17% of respondents)
- Paraprofessional staff decrease — 12 (25% of respondents)
- Teams implementation — 1 (2% of respondents)
- Merge with cataloging — 7 (15% of respondents)
- Merge with ILL — 3 (6% of respondents)
- Other — 5 (10% of respondents)
- No Answer — 1 (2% of respondents)

The effects of downsizing are spread across the board — 15% say the effects were positive, 17% negative, and 13% indicated "other."

Budgeting

Since money was the number one concern for the industry in the 21st century according to the first question of our survey, here is the corresponding information regarding the budgetary reasons for this concern. In the past year, 67% of respondents indicate that their materials budget has increased, and the average increase was 5.6%. 10% say they have experienced a decrease (average decrease = 8.4%), while 17% say they have seen no change. Three people did not respond to the question.

The materials budget for books is much more widely split. 38% report an increase, 21% report a decrease, and 29% report no change. One respondent did not have a separate budget for books, and five people did not give a response. The average increase was 6.9%, ranging from 3% to 30%. The average decrease was 12%, ranging from 2% to 35%.

Journal budgets have increased for 48% of respondents, decreased for 25%, and have

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not changed for 21%. Three people did not answer the question. Of those with an increase, the average was 6.4%, and ranged from 2% to 10%. Decreases averaged 15.2%, ranging from .02% to 54%.

The greatest increase was seen in the budget for electronic resources. 75% report an increase in the past year, while zero respondents reported a decrease. 13% say there was no change, one person had no specific budget for e-resources, and five people did not respond. The average increase was 11.1%, ranging from 4% to 60.

On average, the biggest portion of the budget is going to journals at 40.5%. This is a change from the previous years, when books took the biggest piece of the budget pie. Books come in second at 26.1%, electronic serials earned 25.4%, online resources earned 25.2%, CD-ROM's were 1.4% and the "other" category received 13.5%. Items listed under "other" included ILL, microforms, and A/V or media needs. It is important to note that these are the averages of the percentages reported on the survey, so the responses do not add to equal 100%. Five people did not respond to this question at all.

Homepage

The majority, 88%, of respondents do have their own homepage. Only 12% said they did not. This seems to be on par with the past two years' results; 87% reported having a Webpage in 2004, and 81% in 2003. There was a bit of confusion over the question, though, as several people wrote in that they do not have a personal Webpage, but their libraries have a site.

Use of the Internet for Operations

39 people, 81% of respondents, say they use the Internet for acquisitions/collection development operations. One respondent (2%) does not use the Internet, and eight people (17%) did not answer. Of those who do use the Internet regularly, use of publisher/vendor Websites ranked in the top of their uses. Peer institution holdings are also checked, and bibliographic information is retrieved online, among other uses.

Document Delivery and Pay-Per-View

When asked if their library used commercial document delivery or pay-per-view, the results were more negative than positive. 58% said no, 38% said yes, and 4% did not respond. Of those who indicated yes, their budgets varied much more; percentages ranged from 0.4 to 5, with an average of 2%. Dollar amounts ranged from \$1,000 to \$50,000 with an average of \$15,375.

Most people, 48%, feel their document delivery operation is very effective. Only 6% said they were not very effective, and 12%

indicated "other." Comments from those who indicated other ranged from "pretty effective" (as opposed to VERY effective), to "not yet evaluated." 34% did not respond.

Pay-per-view operations did not receive the same praise; only 4% said their operations were very effective. 4% responded that they were not very effective, 17% responded "other," and a whopping 75% did not respond.

A majority of respondents indicated that they use ILLs or pay-per-view operations as a concrete factor in collection purchasing decisions. 58% said yes, 38% said yes, and 4% didn't respond.

The vast majority keep and use statistics on their electronic resources. 92% claimed that they did, while 6% indicated no for an answer. The other 2% did not respond to the question. Of those who do keep statistics, most of them indicated that it is an informal process, with no time to devote to doing it properly. Of those who answered no, two commented that they planned to begin doing it soon.

Training

88% of those surveyed indicate that their library provides training for Library Technical Assistants. This is down from 96% last year. Only 2% responded that their training was not provided, and there was a 10% no response rate. Survey respondents were asked to indicate what type of training was provided, and most marked more than one category. 77% said that in-house classes were provided by existing staff, 35% use continuing education with experts from outside the library, 23% use satellite transmissions, 58% have travel to conferences and workshops funded, and 35% fund credit courses. 13% indicated "other," most of which was "as needed" training.

Dealing with More Resources and More Demands

A problem for many libraries, with reduced staff and increased workloads, is how to deal with more resources and more demands. 90% of you are absorbing the work into your current workflow. Only 2% are reduced to providing essential services only; 29% are teaching the end user to do research on his or her own; 4% send users to another library; and 31% are using other means of coping, including re-organization and a lot of hustling! One person did not answer the question.

Paperback Only

12% of respondents said they have implemented paperback only approval plans, down from 30% last year. 52% said they have not, and 33% say they don't have an approval plan. Two people did not respond. 25% of respondents have implemented paperback

only for firm orders, 65% have not, and 10% had no answer.

Electronic Journal Subscription

In the ever-increasing move to all things electronic, 81% of respondents claim to have cancelled paper subscriptions in favor of electronic subscriptions to journals. The approximate dollar amount of these cancellations averaged \$174,105, with a range from \$3,500 to \$2.5 million (!). Archiving this information is a top concern for most; 25% hope that some other library will worry about this, 29% say they are keeping electronic information in whatever format they acquire it. 19% are keeping paper for the present, and 25% have other methods of archiving their materials. 15% of respondents did not answer.

Distance Ed

Distance education is offered by 65% of institutions surveyed. These courses are offered in various locations, from "anywhere" via the Internet, to remote campus locations across state, to internationally. Distance education is supported by most institutions, though the degree of support varies widely. Some offer electronic resources only, some provide librarian(s) support, and some provide ILL services.

Merged with Computer Center

Only 10% of respondents say that they are merged with their institution's computer center. Of those who are merged, one commented that they contained one computer lab and another said they were part of the Office of the CIO.

Type of Librarian and Years of Experience

The majority, 84%, of our survey respondents are academic librarians (up from 40% last year!). 2% are special, 10% tech services, 2% government, and 2% other. No respondents indicated reference or public as their description.

The average number of years our respondents have been a librarian was 17.8, down from 19.7 last year, with a range from 2 to 35 years. For the three years before this, the average has stayed almost flat, going from 19.4 to 21 to 19.8.

When broken down further, the numbers are spread fairly evenly, unlike the previous years. 11 respondents had between 1 and 10 years of experience, 17 had from 11 to 20 years, and 17 had 21 or more years experience.

Library Journals Read

Against the Grain, interestingly enough, had overwhelming support with 100% of survey respondents. Other journals read were *C&RL* at 63%; *Library Journal* at 58%; *Choice* at 42%; *Information Technology in*

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ATG Interviews Victoria Reich

Director LOCKSS Program, Stanford University Libraries

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Column Editor's Note: In his column for this issue of *ATG* Greg Tananbaum profiles **LOCKSS** and **Portico**, describing how the programs work and highlighting the differences and similarities between the two. Recently, **Eileen Fenton**, Executive Director of **Portico**, and **Vicky Reich**, Director of the **LOCKSS Program**, very kindly took some time to answer a few questions for me, going into a little more detail about their organizations. In these interviews we touch on a variety of subjects including the sustainability of archiving, quality control, and new developments at the two organizations. **Reich** also took some time to explain **CLOCKSS**, the new **LOCKSS** initiative. — CF

ATG: How long have you been with the **LOCKSS Program** and what is your role?

VR: I helped to co-found the **LOCKSS Program** with A LOT of "help from my friends," most notably **David S.H. Rosenthal**, Chief Scientist **LOCKSS Program**.

When we started the **LOCKSS Program** (www.lockss.org) I was Assistant Director of **HighWire Press**. Two of my many responsibilities were assisting publishers think through issues relating to online/print subscription models and managing a very large study on how people use online electronic journals. These experiences plus years as head of serials and acquisitions (**Stanford University**, **National Agricultural Library**) and as a reference librarian (**Library of Congress**, **University of Michigan**) influenced the design of the **LOCKSS Program**. And most recently I became involved with the **CLOCKSS** initiative, a community managed dark archive.

ATG: Who created the **LOCKSS Program**?

VR: So many people and groups...it was a community effort. The **LOCKSS Program** received several NSF grants and two grants from the **Mellon Foundation**, and considerable support from **Sun Microsystems**, **Stanford University**, **Intel Laboratories**, and the **Hewlett Packard Laboratories**. Six libraries alpha tested the **LOCKSS Program** from 1998 to 2001: **Harvard University**, **Columbia University**, **U. California Berkeley**, **Stanford University**, **University of Tennessee**, and **Los Alamos National Laboratory**. Thirty libraries beta tested the software from 2002 through mid-2004. The community is now running approximately 140 **LOCKSS** boxes.

ATG: What need does the **LOCKSS Program** fill?

VR: The **LOCKSS** system reinstates the traditional role of librarians by allowing libraries to fulfill their responsibility to take custody of and preserve cultural and social assets for future generations.

Ten years ago Web technology forced a change in the business rela-

tionship between librarians and publishers. Libraries could no longer take custody of materials — they now lease subscription materials or "just access" non-subscription materials. It disrupted the role libraries have played in society for hundreds of years as trusted keepers of information and culture for future generation.

The **LOCKSS** system automatically ingests content as part of the subscription process, robustly preserves and migrates the content to new formats, and transparently provides access to local users whenever the material is not available from the publisher's server.

ATG: What has been the reaction of publisher's and librarians since the system was released into production in 2004?

VR: Take a look here <http://lockss.stanford.edu/about/titles.htm>, and here <http://lockss.stanford.edu/about/users.htm>.

Over 70 publishers have chosen to preserve their materials in libraries using the **LOCKSS** system. This uptake was completely through word of mouth and community involvement.

In addition to running **LOCKSS** boxes to preserve electronic journals, libraries and consortia groups are preserving an incredibly WIDE variety of content [image collections, Websites, archival and manuscript collections]. They are working to preserve databases, blogs and books. **GPO** is leading a federal government depository library document preservation project and states are getting into the game as well. Remarkable what a community and a bit of open source software can accomplish.

ATG: How is the **LOCKSS Program** currently funded, and what is your business plan? What do you think the long term sustainability of this model is?

VR: We are moving toward full sustainability and ending reliance on "soft money" via the **LOCKSS Alliance**. In the first year of the **LOCKSS Alliance** the community has provided 2/3 of what's needed for full sustainability. We keep costs low. The **Stanford** team is small, lean, and extremely efficient. By policy, the **LOCKSS** team at **Stanford** will not increase. As the need for technical expertise increases we are growing an open source technical community. A centralized technical staff is a vulnerable point of failure for a wide variety of reasons. The community is our marketing vehicle. The **LOCKSS Program** approach has gained world wide adoption via word of mouth and "neighbor" recommendations. The **LOCKSS** board* and technical policy committee** provide governance. As central costs are expected to remain constant, and the **LOCKSS Alliance** membership is expected to grow —> **LOCKSS Alliance** membership dues will decrease over time.

The **LOCKSS Alliance** Board

- **Carol Pitts Diedrichs**, Dean of Libraries, **University of Kentucky Libraries**
- **Nancy L. Eaton**, Dean of University Libraries, **The Pennsylvania State University**
- **David S. Ferriero**, Director and Chief Executive of the Research Libraries, **New York Public Library**
- **Brinley Franklin**, Vice Provost for University Libraries, **University of Connecticut**
- **Michael A. Keller**, University Librarian, Director of Academic Information Resources, **Stanford University**
- **Susan K. Nutter**, Vice Provost and Director of Libraries, **North Carolina State University**

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Libraries at 21%; *Publishers Weekly* at 16%; *Special Libraries* at 15%; *LACTS* at 6%; *Wired* at 8%; *Internet World* at 4%; and 56% selected "other."

Among the other journals listed, *American Libraries*, *Journal of Academic Libraries*, *Journal of American Medical Libraries* and *LRTS* each came in with several votes.

Thank you to all who participated. Your input is greatly appreciated! 🐘