Library Resource Guide

FUNDING AND PRIORITIES:
SPECIAL AND CORPORATE LIBRARIES
GOVERNMENT AGENCY LIBRARIES

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2011 LIBRARY SPENDING PLANS

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President

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Funding and Priorities: The Library Resource Guide Benchmark Study on 2011 Library Spending Plans was produced by Unisphere Research and sponsored by ProQuest. Unisphere Research is the market research unit of Unisphere Media, a division of Information Today, Inc., publishers of *Database Trends and Applications* magazine and the *5 Minute Briefing* newsletters. Unisphere Media, 229 Main Street, Chatham, NJ 07928. Tel: 973-665-1120, Fax: 973-665-1124, Email: Tom@dbta.com, Web: www.dbta.com.

Data collection and analysis performed with SurveyMethods.

EXECUTIVE SUMMARY

Special and corporate libraries hold a unique position in the library management world, as they cater to advancing specialized knowledge and opportunities for specific constituencies, and may rely on single sources of funding for their initiatives. Still, they are subject to the same forces as their public or academic counterparts in terms of demonstrating relevancy and an ability to deliver in-depth information using the latest digital tools and platforms. And, like their public and academic brethren, special and corporate libraries also have had to tighten their belts in the midst of a tight and increasingly hyper-competitive economy.

These are some of the conclusions of a recent survey of 197 special or corporate library managers and professionals from across North America. This study, conducted by the *Library Resource Guide (LRG)*—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI)—in October and November 2010 among libraries listed in ITI's American Library Directory, reveals current spending patterns for public, academic, government, and special libraries and projects budget and other spending trends for 2011. A total of 1,201 libraries representing four key segments—academic libraries, public libraries, special and corporate libraries, and government (mainly state, federal, and armed forces) libraries responded to the survey.

In this survey, 28% of the libraries surveyed are affiliated with healthcare institutions, and another 26% are part of associations, foundations, or museums. Another 14% are with legal libraries. Among the 197 respondents are directors, administrators, managers, department heads, and librarians from the complete range of library settings and sizes. One-fourth serve populations of greater than 10,000 constituents. (For detailed demographic breakdowns, see Figures 27–30 at the end of this report.)

Key findings from the survey include the following:

- Special and corporate libraries tightened their budgets over the past year, but spending will be more stable in the year ahead. Larger libraries were most likely to have suffered cuts and will continue to do so in 2011. Typical annual budgets currently fall in the range of $300,000 to $2 million, and budgets are evenly split between staffing and content acquisition.
- Four out of five special and corporate libraries cut back in one or more areas over the past year, led by cuts in subscriptions and staff training. However, many continued to increase funding for digital resources, including online subscriptions and ebooks. Larger libraries are also pressuring vendors to renegotiate contracts for more favorable terms.
- Print resources still consume a majority of annual content budgets, but almost all growth in demand among special and corporate libraries is for digital information and technology resources.
- Special/corporate libraries maintained their information technology system budgets through the budget storm, and are growing their online subscription purchasing. Few of these libraries are considering cloud computing approaches, however. Social media tools are also now part of most libraries' offerings.
- From a strategic perspective, most special and corporate libraries see the future as digital, and are directing efforts to increase accessibility and awareness of digital offerings.

Special and corporate libraries are built and maintained as part of the organizations they serve, and thus, managers in this segment may have to pay particular attention to the internal politics that affect budgeting and resource allocations, some respondents warn. "In a corporate environment, our challenge is retaining visibility in the organization, and staying current with technology in an environment of stagnant or shrinking budgets," says the manager of a utility's internal library.

The head librarian for a large healthcare facility cautions that many librarians don't do a good job of selling their roles to organizations at large. "There's a propensity for administrators to sacrifice library departments, staff or services during budgetary or organizational crises through misguided dependence upon online services proffered as alternatives to physical facilities with live staff," the respondent says. "Libraries have to inculcate a dependency in administrators for their services by direct and aggressive (yet respectful) delivery of both traditional and electronic services, with clear and decisive contributions by library staff to organizational success."

The bottom line is that, just as the organizations they serve may be under pressure to deliver greater value to constituents or customers, special and corporate libraries face a similar mandate. "Library professionals need to be more business-savvy in their approach to delivering products and services," says the administrator for a healthcare organization library. "Library professionals need to better educate their users on the librarian's role in the 21st century. In order for library professionals to stay ahead of the curve, we need teach our trade to our users so they can understand our significance and role in the 'Google Age.'"

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SPECIAL/CORPORATE LIBRARIES' BUDGETS AND FUNDING

Special and corporate libraries tightened their budgets over the past year, but spending will be more stable in the year ahead. Larger libraries were most likely to have suffered cuts and will continue to do so in 2011. Typical annual budgets currently fall in the range of $300,000 to $2 million, and budgets are evenly split between staffing and content acquisition.

In order to ensure that this survey would accurately measure current and projected budgets, screening questions were used to qualify respondents. A majority of survey respondents, 62%, reported they have some role in managing their library's budget, and about one-third have influence over purchasing decisions. A large segment—more than two-fifths— indicate that they have direct authority or final say in budget matters. (See Figure 1.)

Overall, the previous 2010 fiscal year was difficult for many special/corporate libraries, with more than one-third reporting decreases in their budgets, versus 29% seeing increases. According to responses, most budgets will be more stable in the year ahead. For fiscal year 2011, 26% of respondents anticipate budget cuts, down from the 34% who saw cuts from 2009 to 2010. In most cases, the increases will be modest, with only a handful topping 5% of the current year's budgets. (See Figure 2.)

Most of the financial pain among special/corporate libraries has been concentrated within larger establishments. About 44% of the largest libraries (serving populations greater than 10,000) report cuts over the past year, compared to 39% of their smaller counterparts. Over the coming year, most of the pain will continue to be felt within the largest special/corporate library settings—30% will continue to face cuts, compared to 25% of the smaller facilities. (See Figure 3.)

Respondents provided their total annual budgets for fiscal year 2010, including all aspects of operations and services—personnel, content acquisitions, collection development, operations, library systems, computers, A/V, media equipment, software, and services. Since respondents represent or oversee differing budget levels—some may only be able to provide responses for their particular library, while others may be representing multibranch or multi-campus systems—budget results are presented across four structural categories:

- Single, independent libraries
- Single libraries within multibranch systems
- Main libraries for multibranch systems
- Entire multibranch systems

Size of population served makes a difference in budgets. For example, libraries serving smaller communities (serving fewer than 10,000 patrons) report annual budgets of about $680,000, on average. By contrast, their larger counterparts have budgets exceeding $1.3 million. Standalone libraries also tend to have smaller budgets—$315,000 a year, compared to $2 million for entire systems with multiple locations. (See Figure 4.)

Content acquisitions represent the largest slice of annual library budgets—on average, 40% of respondents' current budgets are spent on materials. Another 37% of the annual budget goes to human resources or staffing. Another 11% of budgets are directed to information technologies, ranging from Integrated Library Systems (ILSs) to media equipment. Only 7% of annual budgets are dedicated to operations and facilities. (See Figure 5.)

"In our law firm environment, our biggest challenge will be to provide the most efficient, yet cost effective, resources to our attorneys in a format that makes the information accessible to them whether in the office, at home or on the road," says the director of a law firm library. "This challenge is complicated by the fact that more and more clients are refusing to pay for research services. Without cost recovery, the high cost of library materials is a greater expense to the firm's bottom line."

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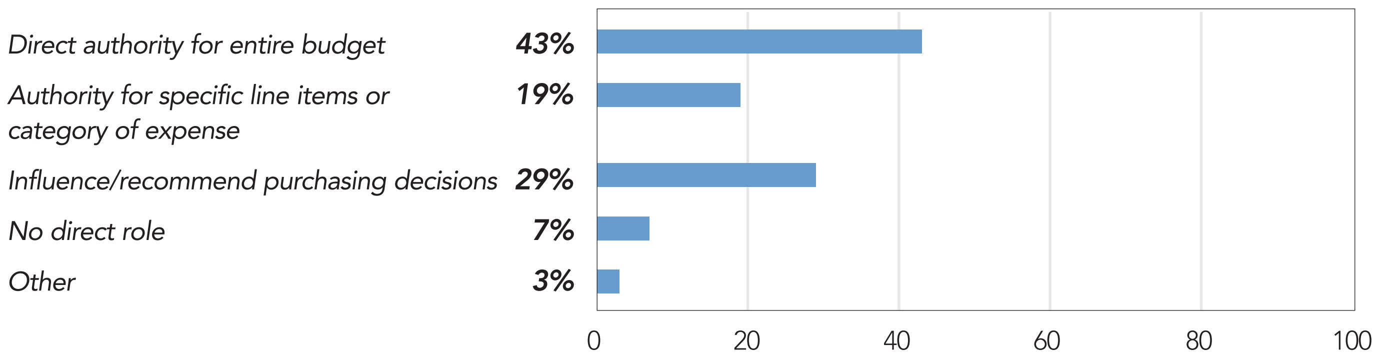
Figure 1: Respondents’ Roles in Managing Special/Corporate Library Budgets



(Total does not equal 100% due to rounding.)

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Figure 2: Changes in Special/Corporate Library Budgets

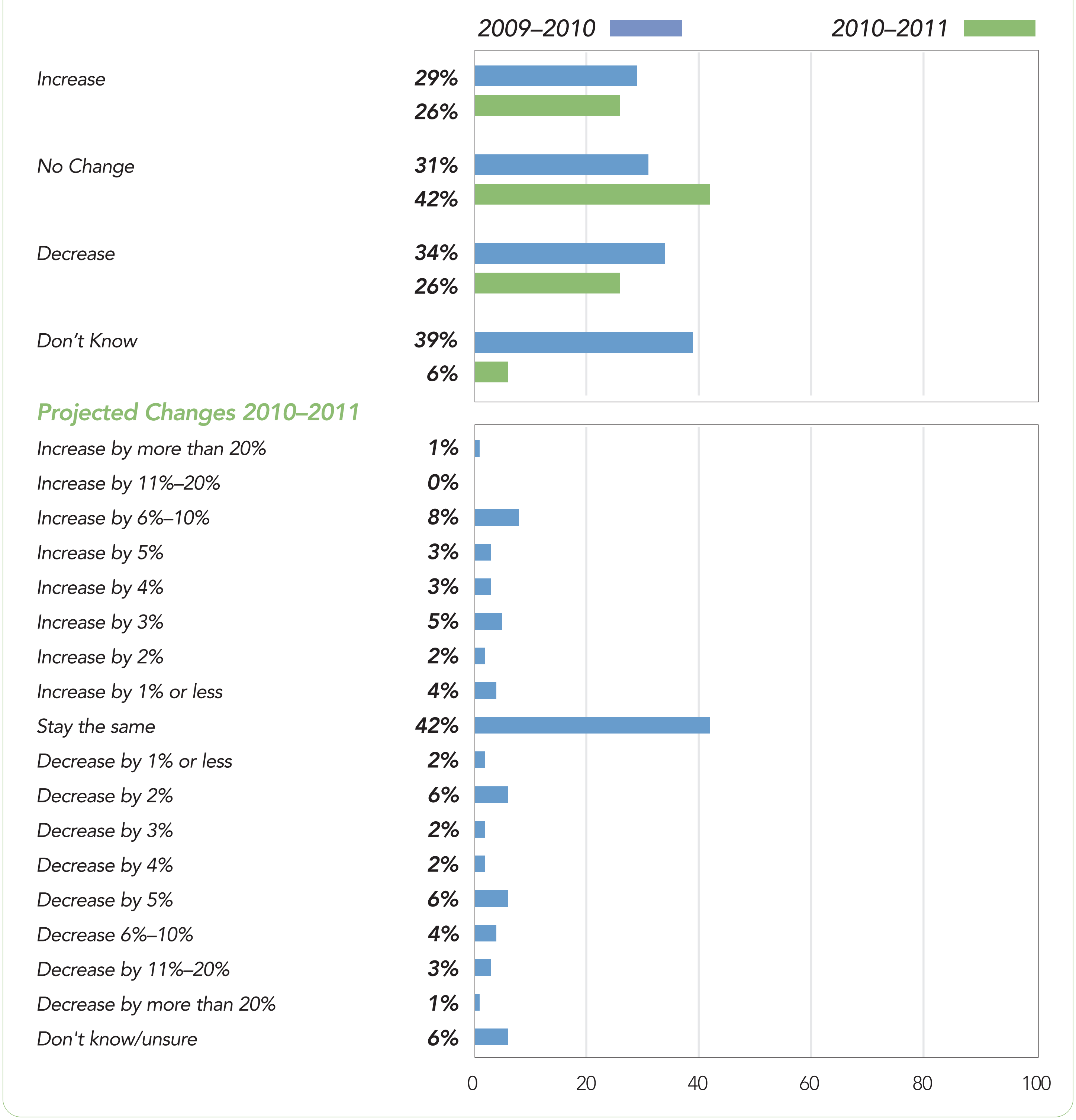

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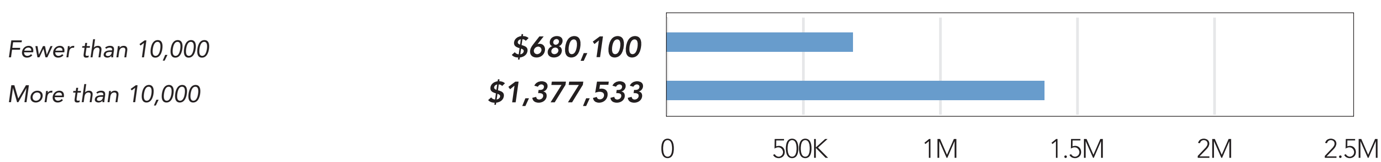
Figure 3: Who's Cutting Back? Special/Corporate Libraries Cutting Budgets—By Population Served

	<10,000	10,000+	AVG.
2009–10	***39%***	***44%***	***34%***
2010–11	***25%***	***30%***	***26%***

Figure 4: Special/Corporate Library Budgets

AVERAGE ANNUAL BUDGET: $894,568

AVERAGE ANNUAL SPECIAL/CORPORATE LIBRARY BUDGET—BY TYPE OF LIBRARY:



AVERAGE ANNUAL SPECIAL/CORPORATE LIBRARY BUDGET—BY TYPE OF LIBRARY:

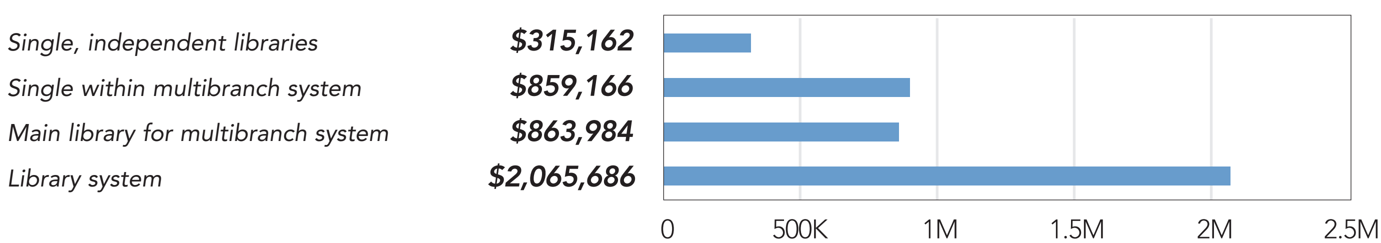


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Figure 5: Percentage of Current Annual Special/Corporate Library Budget Dedicated to Key Areas

	<10,000	10,000+	AVG.
Content acquisitions/collection development	***42%***	***36%***	***40%***
Personnel/staffing	***35%***	***38%***	***37%***
Library systems, computers, A/V, media equipment, software, and services	***11%***	***12%***	***11%***
Operations/facilities	***7%***	***9%***	***7%***
Other	***5%***	***5%***	***5%***

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MANAGING IN A NEW ERA

Four out of five special and corporate libraries cut back in one or more areas over the past year, led by cuts in subscriptions and staff training. However, many continued to increase funding for digital resources, including online subscriptions and ebooks. Larger libraries are also pressuring vendors to renegotiate contracts for more favorable terms.

Seventy-four percent of respondents indicated that at least some of their budgets were cut or frozen in areas of their operations over the past year. When it became necessary to make cuts, most special and corporate libraries did so with subscription plans first. Close to half indicated they curtailed subscriptions, and, as shown later in this report, this was most likely to be print subscriptions. Training and conferences also took a hit—two-fifths of respondents reported they were forced to make cuts in travel and education for their staffs. Approximately three out of 10 also put a hold on salary increases. While many of these cutbacks were made across the board among special/corporate libraries of all sizes, smaller facilities were most likely to have cut back on subscriptions, and larger facilities were far more likely to have frozen staff salaries. Larger institutions were also far more likely to be engaging with vendors to negotiate lower prices to meet their limited budgets (40%, versus 29% overall). (See Figure 6.)

Survey respondents mentioned a variety of tactics or situations they were dealing with as ways to get through the economic downturn. One respondent, a manager of a Midwest health organization's library, observed that his library was employing usage stats "to justify cancellation [of] some online products."

While many special and corporate libraries experienced cutbacks in a number of areas during the past year, that doesn't mean there weren't areas in which spending was still growing. Acquisitions of online subscriptions and ebooks was most in evidence among these libraries through the past year. About one in eight also ramped up ebook investments, a movement that was strongest among smaller facilities. (See Figure 7.)

Where do most funds come from? Half of the libraries in the special/corporate sector received their funding directly from corporations, but many report a mix of funding sources. About a quarter, for example, rely on gifts and donations, and one out of five even receive stipends from their states. Grants and endowments are sources for 15% and 10%, respectively. (See Figure 8.)

As the economy soured in 2008 and 2009, a number of libraries ramped up their appeals for gifts, donations, and grants to support programs. More than one-fourth report they turned to these additional sources as a result of the economic downturn. Larger libraries have been the most aggressive in seeking grants and gifts. (See Figure 9.)

The ability to attract funding depends on how well libraries can demonstrate their importance to the communities they serve. "The biggest challenge is proving the relevance of libraries," says the head librarian for a facility at a state environmental agency. "We have a staff of two librarians who manage a 60,000-volume collection and 250 journal subscriptions. We produce extensive monthly and annual reports that document every task that we perform. I think it is important because libraries are expected to do more with less. So, we need to continue to prove our relevance so that the funding continues."

One solution available to libraries is pooling their efforts in various consortia or networks. Materials are shared and costs mitigated across networks, which are often nonprofit membership associations. The survey finds that there was relatively mild interest in pursuing this approach as a strategy for dealing with lean budgets. (See Figure 10.) About two-thirds of respondents report their libraries are already part of one or more consortia or networks. (See Figure 11.) Still, respondents have had mixed levels of support from the consortia of which they are a part. A majority say they have not seen a change in their levels of support from their membership consortia over the past year. (See Figure 12.)

Still, for some special libraries, the challenge may be a lack of control, especially for those that rely on non-traditional funding sources. "Since we are a museum, our biggest challenge is getting people to come to the institution," says the library manager for a large museum. "Even though we have been in existence for over 80 years, very few people know we exist! Since we are funded primarily by the door, there isn't enough money to advertise."

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Figure 6: Actions to Manage or Respond to Budget Cuts/Freezes

	<10,000	10,000+	AVG.
Cut spending on subscriptions	***54%***	***40%***	***49%***
Cut or eliminated conference/travel/education budget	***42%***	***48%***	***42%***
Salary freezes	***27%***	***44%***	***31%***
Renegotiated contracts with vendors	***29%***	***40%***	***30%***
Moved more services/materials online	***25%***	***32%***	***26%***
Added volunteers	***21%***	***16%***	***20%***
Staff layoffs/staff hours cut	***19%***	***20%***	***18%***
Collaborated/shared with other libraries/joined consortia	***11%***	***28%***	***15%***
Applied for more grants	***10%***	***16%***	***12%***
Reduced IT expenditures	***10%***	***20%***	***12%***
Consolidated departments	***7%***	***12%***	***9%***
Reduced programming	***9%***	***8%***	***8%***
Reduced library hours	***9%***	***4%***	***8%***
Lobbied for more funding from institutions	***9%***	***4%***	***7%***
Closed facilities	***0%***	***4%***	***1%***
Don't know/unsure	***5%***	***0%***	***4%***
Other	***5%***	***12%***	***7%***
We have had no cuts or budget freezes over the past year	***22%***	***16%***	***22%***

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Figure 7: Areas Seeing Increased Spending or Support Over the Past Year

	<10,000	10,000+	AVG.
Online subscription acquisitions	***29%***	***24%***	***26%***
Digital content collections/services	***15%***	***5%***	***12%***
Ebooks	***12%***	***10%***	***11%***
Library technology equipment, software	***7%***	***14%***	***8%***
Book acquisitions	***7%***	***5%***	***6%***
Personnel	***7%***	***5%***	***6%***
Periodicals/serials acquisitions	***3%***	***10%***	***5%***
IT services	***3%***	***5%***	***4%***
Facilities upgrades/maintenance	***3%***	***0%***	***3%***
Library hours/availability	***1%***	***0%***	***1%***
Operations	***0%***	***5%***	***1%***
Multimedia/streaming media	***1%***	***0%***	***1%***
Cloud-based solutions	***1%***	***0%***	***1%***
Don't know/unsure	***7%***	***5%***	***8%***
Other	***4%***	***4%***	***5%***
We have had no spending increases over the past year	***44%***	***57%***	***44%***

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Figure 8: Primary Special/Corporate Library Funding Sources

	<10,000	10,000+	AVG.
Corporate funding	***52%***	***44%***	***50%***
Gifts and donations	***22%***	***26%***	***25%***
Public funding—state	***20%***	***19%***	***19%***
Grants	***12%***	***19%***	***15%***
Public funding—local	***6%***	***19%***	***11%***
Endowments	***11%***	***7%***	***10%***
Special fundraising events	***10%***	***7%***	***10%***
Public funding—federal	***5%***	***11%***	***7%***
Fee-based services	***7%***	***4%***	***6%***
University/school funding	***6%***	***4%***	***5%***
Don't know/unsure	***1%***	***0%***	***2%***
Other	***12%***	***14%***	***14%***

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Figure 9: Library Funding Sources Identified or Increased During Recent Economic Downturn

	<10,000	10,000+	AVG.
Gifts and donations	***27%***	***28%***	***28%***
Grants	***13%***	***42%***	***20%***
Corporate funding	***10%***	***21%***	***13%***
Special fundraising events	***8%***	***11%***	***8%***
Fee-based services	***5%***	***21%***	***8%***
Endowments	***6%***	***5%***	***6%***
University/school funding	***2%***	***0%***	***1%***
Public funding—federal	***2%***	***11%***	***3%***
Public funding—state	***2%***	***0%***	***1%***
Public funding—local	***2%***	***0%***	***1%***
Don't know/unsure	***35%***	***21%***	***33%***
Other	***16%***	***5%***	***13%***

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Figure 10: Changes in Participation in Consortia/Networks by Special/Corporate Libraries During Recent Economic Downturn

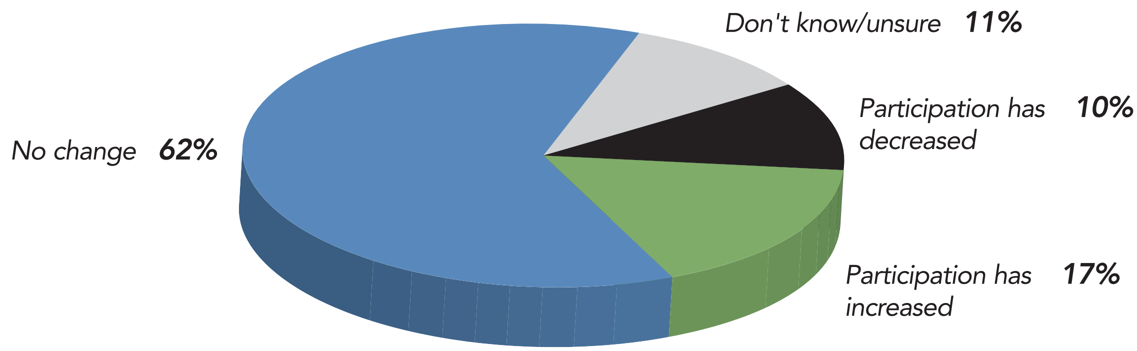

Figure 11: Number of Consortia or Network Memberships by Special/Corporate Libraries

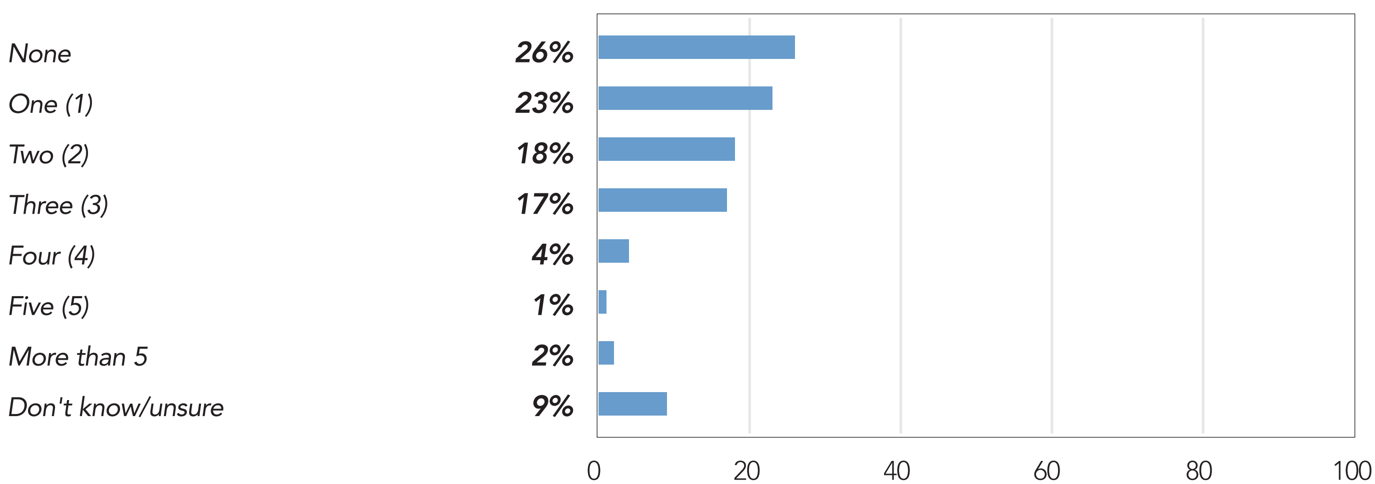

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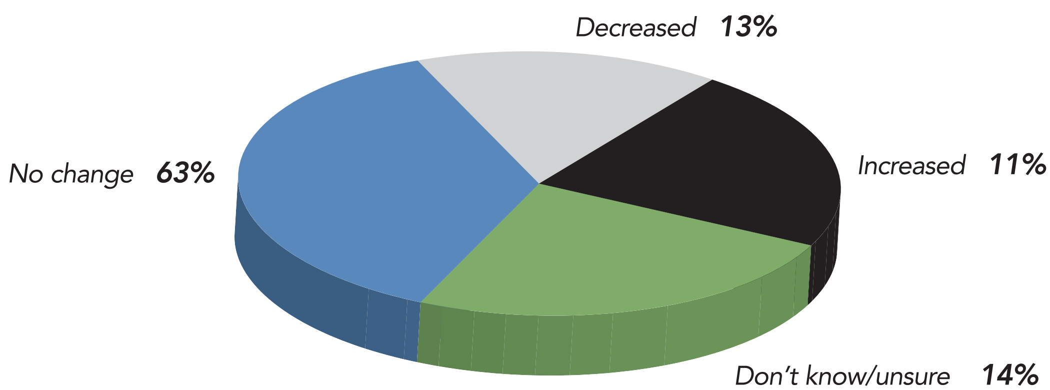
Figure 12: Change in Support From Consortia/Networks Over Past Year



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DIGITAL AND ELECTRONIC RESOURCES

Print resources still consume a majority of annual content budgets, but almost all growth in demand among special and corporate libraries is for digital information and technology resources.

Special and corporate library users see their facilities not only as centers of professional or specialized knowledge, but also as gateways to technology and digital resources. Close to half indicate that they have seen a surge in patrons seeking computer and web access. This trend is seen in both larger and smaller establishments in the survey. (See Figure 13.)

The rising demand for digital over print resources is also confirmed in another survey question, in which 70% of respondents report increased demand for materials in digital format, twice the level seeking print. (See Figure 14.)

Among special/corporate libraries, print acquisitions still edge out digital acquisitions within content acquisition budgets. More than half of respondents' budgets either are dedicated to printed books and materials (30%), or print serials and periodicals (23%). One-third of library budgets, 33%, is dedicated to online databases and digital content collections, while 3% is spent on ebooks and another 1% of budgets are spent on video, audio, computer-based modules, or games. However, larger libraries appear to have made the shift in budget priorities toward digital and ebooks—an average total of 44% of budgets are dedicated to printed materials, versus 40% of budgets being spent of digitally formatted offerings. (See Figure 15.)

Figure 13: Where Patron Requests Have Increased Over the Past Year

	<10,000	10,000+	AVG.
Computer/web access	48%	44%	47%
Wireless access	31%	26%	30%
Ebooks	29%	32%	29%
Technical information/training	27%	29%	27%
Medical	33%	21%	28%
Primary and continuing education programs/requirements	13%	12%	13%
Audiobook	10%	12%	10%
Streaming media	8%	6%	7%
Job search/career development information	8%	0%	6%
Computer games/simulations	2%	3%	2%
English language instruction	2%	0%	2%
Don't know/unsure	8%	18%	11%
Other	9%	11%	10%

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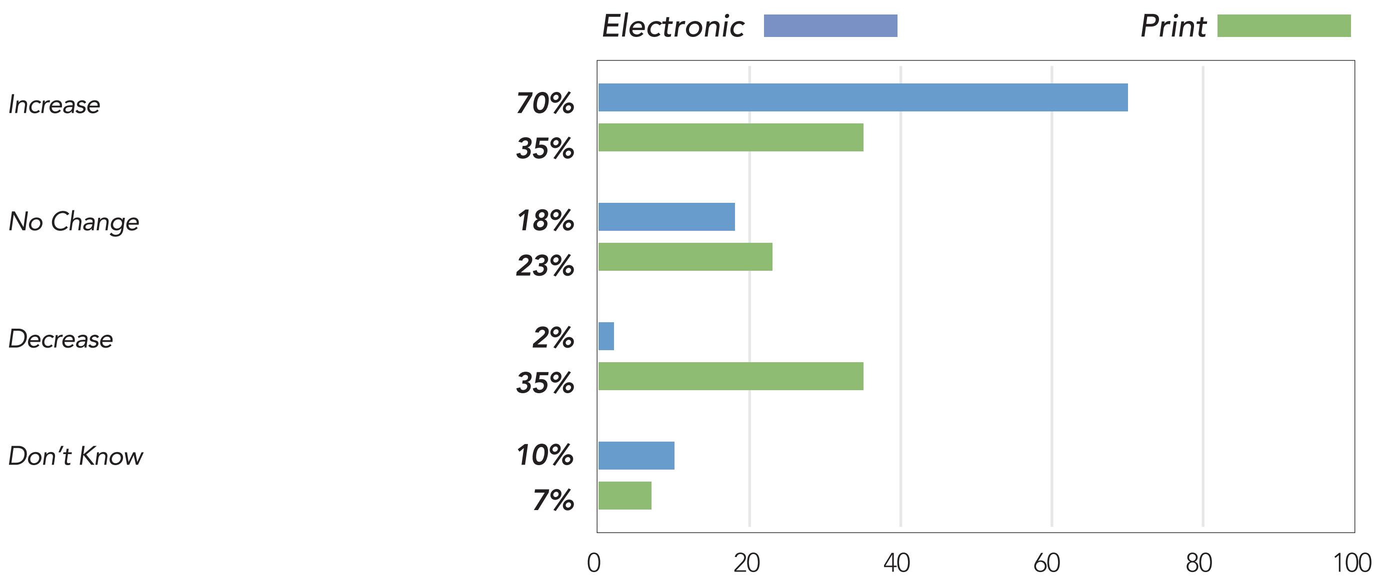
Data collection and analysis performed with SurveyMethods.

Figure 14: Change in Demand for Library Print and Electronic Offerings and Services Over the Past Year



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Data collection and analysis performed with SurveyMethods.

Figure 15: Content Acquisitions Portion of Respondents' Budgets

	<10,000	10,000+	AVG.
Online databases, digital content collections	***34%***	***35%***	***33%***
Serials/Periodicals (print)	***31%***	***21%***	***30%***
Printed books and other printed materials	***22%***	***23%***	***23%***
Other (microforms, manuscripts, archives, preservation, etc.)	***4%***	***9%***	***5%***
Ebooks	***3%***	***3%***	***3%***
Special programs	***2%***	***1%***	***2%***
Media titles (video, audio, computer-based modules, games, etc.)	***1%***	***2%***	***1%***
All other categories	***2%***	***4%***	***2%***

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Data collection and analysis performed with SurveyMethods.

TECHNOLOGY EQUIPMENT AND SERVICES

Special/corporate libraries maintained their information technology system budgets through the budget storm, and are growing their online subscription purchasing. Few of these libraries are considering cloud computing approaches, however. Social media tools are also now part of most libraries' offerings.

For the most part, library spending on information technology hardware, software, and related IT services (not including online subscriptions) has held steady over the past year. Just over one-fifth say spending increased, while only 6% say it decreased. Any declines in library tech spending were most pronounced among the larger libraries in the survey—12% of those with constituencies of 10,000 people or more made cuts in technology spending, or four times the level of their smaller counterparts. (See Figure 16.)

Tech spending at special and corporate libraries will remain unchanged over the coming year, the survey finds. As has been the case through 2010, growth in IT spending will be more pronounced among the smaller facilities—23% of libraries serving fewer than 10,000 people plan to boost spending, versus 15% of their larger counterparts. (See Figure 17.)

Many special and corporate libraries were faced with hard choices as to how to pare down their annual budgets, but online subscriptions were considered essential, the survey finds. Over the past year, close to half increased spending in this area, compared to barely a handful cutting back. Increasing online subscriptions was considered a priority among all sizes of special/corporate libraries. (See Figure 18.)

The pace of increases in online subscriptions will ease somewhat over the coming year, but two-fifths of the special/corporate libraries surveyed still intend to keep at it. Forty-one percent of respondents overall plan to increase their online subscriptions, with only 9% planning any cutbacks. (See Figure 19.)

Few special/corporate libraries are embracing cloud computing, the survey finds. Virtually none are using public cloud resources at this time, and only a handful are planning to do so. This is the case in both larger and smaller facilities. (See Figure 20.)

In terms of existing technology products or services, online public access catalogs (OPACs) are a standard for almost all special/corporate libraries, present at 82% of sites. Close to three-fourths also maintain their own networks and websites, and about half offer a LAN, WAN, or wireless network for online access. A majority of the larger libraries in the sample also have an integrated library system (ILS). Larger facilities are also more likely to be adopters of link resolvers (often referred to as OpenURL link resolvers), or software that provides full text access to scholarly citations formatted as an OpenURL (42% of larger libraries versus 18% of their smaller counterparts). (See Figure 21.)

Along with existing investments, library managers were asked to identify areas in which they intended to make new purchases or upgrades. Online library catalogs are highest on the list of planned purchases over the coming year, particularly among larger facilities. Larger libraries also plan to upgrade their computer hardware and integrated library systems. (See Figure 22.)

Web 2.0—which encompasses the use of online social media, as well as communication and collaboration tools such as blogs or wikis —is another area key to some special/corporate libraries' plans. Close to one-third are either communicating to constituents via blogs or wikis, or offering the means to do so. About one-fourth are either encouraging or planning to encourage the use of social networking tools such as Facebook and LinkedIn. One-fifth are sharing library web pages and subject guides, such as LibGuides. (See Figure 23.)

"You can purchase, install, advertise and promote all of the very best resources, but users are gravitating to general web searching far too often," one respondent cautions. "This is an extremely serious situation in the medical setting where end-users are often very far from the Library. Online access gives the false impression that everyone has the ability and skill to use those resources effectively. When they come to the realization that they cannot or it's too difficult, they use Google."

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Data collection and analysis performed with SurveyMethods.

Figure 16: Change in Special/Corporate Library Spending on Information Technology Hardware, Software, and Related IT Services Between 2009–2010 (not including online subscriptions)

	<10,000	10,000+	AVG.
Increased	***24%***	***18%***	***21%***
Stayed the same	***60%***	***53%***	***57%***
Decreased	***3%***	***12%***	***6%***
Don't know/unsure	***14%***	***18%***	***16%***

Figure 17: Change in Special/Corporate Library Spending on Information Technology Hardware, Software, and Related IT Services Over Coming Year (2010–2011) (not including online subscriptions)

	<10,000	10,000+	AVG.
Increased	***23%***	***15%***	***21%***
Stayed the same	***51%***	***58%***	***51%***
Decreased	***8%***	***9%***	***8%***
Don't know/unsure	***17%***	***18%***	***20%***

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Data collection and analysis performed with SurveyMethods.

Figure 18: Change in Special/Corporate Library Spending on Online Subscriptions Between 2009–2010

	<10,000	10,000+	AVG.
Increased	***46%***	***49%***	***46%***
Stayed the same	***37%***	***31%***	***37%***
Decreased	***10%***	***6%***	***9%***
Don't know/unsure	***5%***	***12%***	***9%***

(Totals may not equal 100% due to rounding.)

Figure 19: Change in Special/Corporate Library Spending on Online Subscriptions Over Coming Year (2010–2011)

	<10,000	10,000+	AVG.
Increased	***43%***	***40%***	***41%***
Stayed the same	***36%***	***39%***	***38%***
Decreased	***11%***	***6%***	***9%***
Don't know/unsure	***8%***	***13%***	***10%***

(Totals may not equal 100% due to rounding.)

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Data collection and analysis performed with SurveyMethods.

Figure 20: Percentage of Special/Corporate Libraries Adopting Cloud Computing

	<10,000	10,000+	AVG.
Currently use cloud resources	*3%*	*3%*	*3%*
Planning or considering cloud resources	*6%*	*6%*	*6%*
No	*67%*	*62%*	*62%*
Don't know/unsure	*24%*	*29%*	*29%*

Figure 21: Information Technology Products/Services in Use

	<10,000	10,000+	AVG.
Online library catalog/OPAC	*81%*	*90%*	*82%*
Intranet/extranet/website	*75%*	*68%*	*72%*
LAN/WAN/wireless network	*49%*	*55%*	*49%*
Integrated Library System (ILS)	*39%*	*52%*	*42%*
Web-based (IM or email) reference service	*39%*	*35%*	*38%*
PCs/kiosks/laptops/mobile devices	*35%*	*39%*	*35%*
Link resolvers	*18%*	*42%*	*23%*
Authentication solutions	*17%*	*35%*	*21%*
Audio/video teleconferencing	*18%*	*16%*	*17%*
Electronic Resource Management Systems	*14%*	*23%*	*16%*
Ebook readers	*4%*	*13%*	*7%*
RFID check-in/check-out, inventory control	*5%*	*10%*	*6%*
Discovery services	*6%*	*3%*	*5%*
Other	*4%*	*9%*	*6%*

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Figure 22: Information Technology Products/Services Planned for Upgrade in Fiscal 2011

	<10,000	10,000+	AVG.
Online library catalog/OPAC	***22%***	***33%***	***25%***
Integrated Library System (ILS)	***13%***	***24%***	***20%***
PCs/kiosks/laptops/mobile devices	***9%***	***29%***	***15%***
Ebook Readers	***15%***	***10%***	***14%***
Intranet/extranet/website	***15%***	***10%***	***14%***
Web-based (IM or email) reference service	***15%***	***0%***	***11%***
Electronic Resource Management Systems	***11%***	***10%***	***10%***
RFID check-in/check-out, inventory control	***6%***	***5%***	***6%***
Link resolvers	***7%***	***0%***	***5%***
Discovery services	***4%***	***5%***	***4%***
LAN/WAN/wireless network	***4%***	***0%***	***2%***
Audio/video teleconferencing	***4%***	***0%***	***2%***
Authentication solutions	***2%***	***0%***	***1%***
Other	***22%***	***14%***	***21%***

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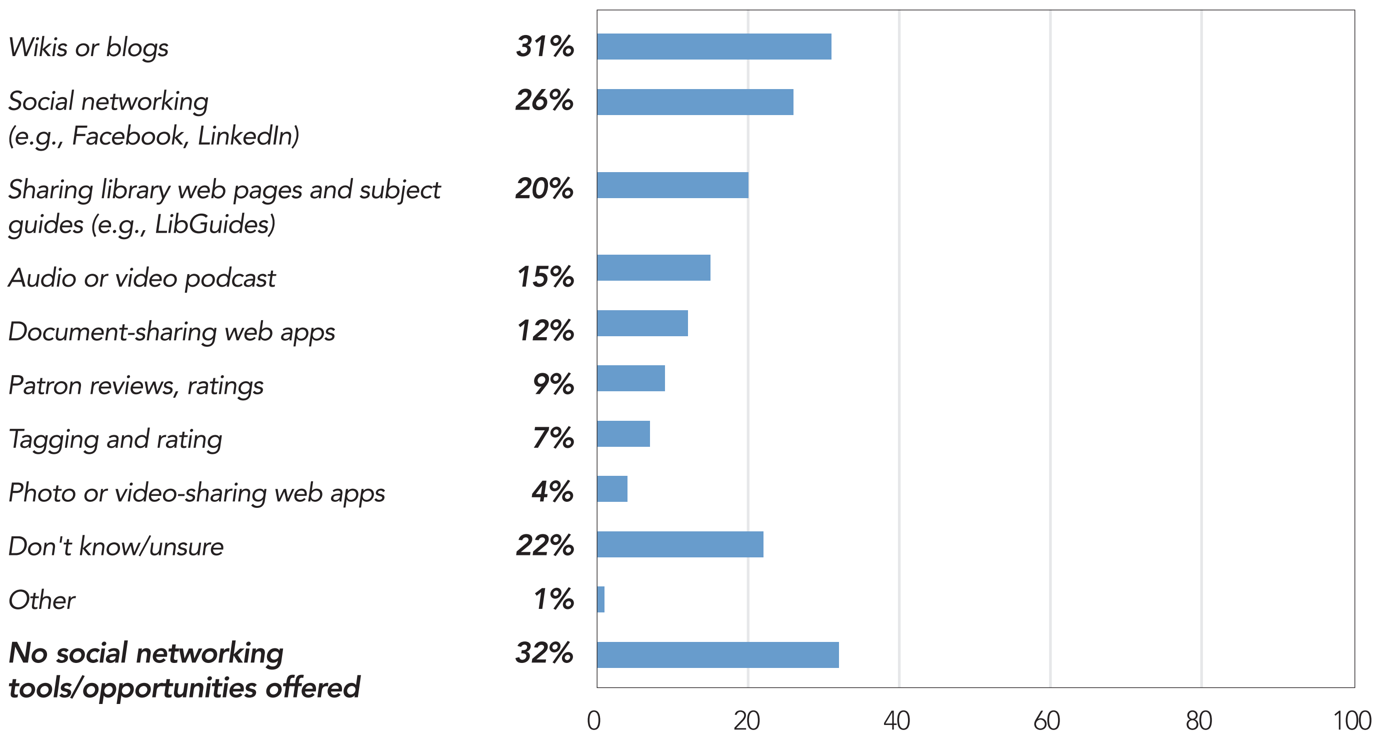
Figure 23: Web 2.0 Services Being Adopted Among Special/Corporate Libraries



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FUTURE PRIORITIES

From a strategic perspective, most special and corporate libraries see the future as digital, and are directing efforts to increase accessibility and awareness of digital offerings.

Special/corporate library managers were asked what their most important strategic priorities are going forward into the new era. Efforts to increase the availability of online resources top the list as the leading endeavor, cited by a majority of respondents. Close to half also see their leading mission over the months and years to come as that of providing the training necessary to take advantage of these services. (See Figure 24.)

Two items dominate the agendas of most special and corporate library managers over the next 5 years: maintaining services with tight budgets (81%), and keeping up with changes in information technology (55%). As the director of a corporate legal library put it, "Libraries will continue to decrease in physical size. Library staff will be expected to provide seamless access to all online subscriptions and the staff will be expected to lead users to the correct electronic source and know how to use all sources."

A sizable segment of respondents, 36%, are also focusing on identifying new sources of funding, and a similar percentage (35%), are concentrating on migrating their print collections and materials to digital formats. Interestingly, relatively few are concerned about their ability to compete with the online world, a major concern among public librarians voiced in the survey. Special/corporate librarians serve specialized niches, and therefore are stewards of knowledge and resources that are unlikely to appear on the World Wide Web. (See Figure 25.)

Half of the special/corporate libraries in this survey now either have formal strategic plans that establish a road map going forward into this new era or are currently developing one. Another 11% are considering such plans. Larger libraries are more likely to have adopted strategic plans than their counterparts in smaller facilities. (See Figure 26.)

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Figure 24: Priorities for the Coming Year

	<10,000	10,000+	AVG.
Increase availability of online publications/digital access	***59%***	***53%***	***55%***
Provide assistance and education on information access tools and services	***48%***	***41%***	***47%***
Drive usage of current resources	***47%***	***38%***	***44%***
Improve/expand customer service	***43%***	***38%***	***41%***
Identify and reach out to new groups of patrons	***31%***	***53%***	***38%***
Enhance discovery of collections	***31%***	***41%***	***36%***
Repurpose physical space	***20%***	***29%***	***23%***
Develop unique library collections	***18%***	***21%***	***21%***
Join/increase participation in consortium/network	***17%***	***26%***	***20%***
Institute special programs for constituents/patrons	***15%***	***18%***	***15%***
Enhance user workflow tools	***10%***	***18%***	***12%***
Physical expansion/upgrade of facilities	***11%***	***12%***	***12%***
Don't know/unsure	***3%***	***9%***	***5%***
Other	***2%***	***5%***	***3%***

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Figure 25: Greatest Challenges Over the Next 5 Years

	<10,000	10,000+	AVG.
Maintaining services with tight budgets	81%	81%	81%
Keeping up with changes in information technology	55%	50%	55%
Identifying new sources of funding	31%	42%	36%
Migrating print content to digital formats	36%	33%	35%
Finding and retaining knowledgeable staff	22%	25%	24%
Keeping facilities open or at preferred operational levels	18%	33%	24%
Competing/keeping up with public online services or offerings	16%	22%	19%
Other	6%	2%	5%

Figure 26: Special/Corporate Library Strategic Plans

	<10,000	10,000+	AVG.
Yes	17%	19%	18%
Under development	26%	39%	32%
Under consideration	13%	8%	11%
No	38%	28%	35%
Don't know/unsure	6%	6%	5%

(Totals may not equal 100% due to rounding.)

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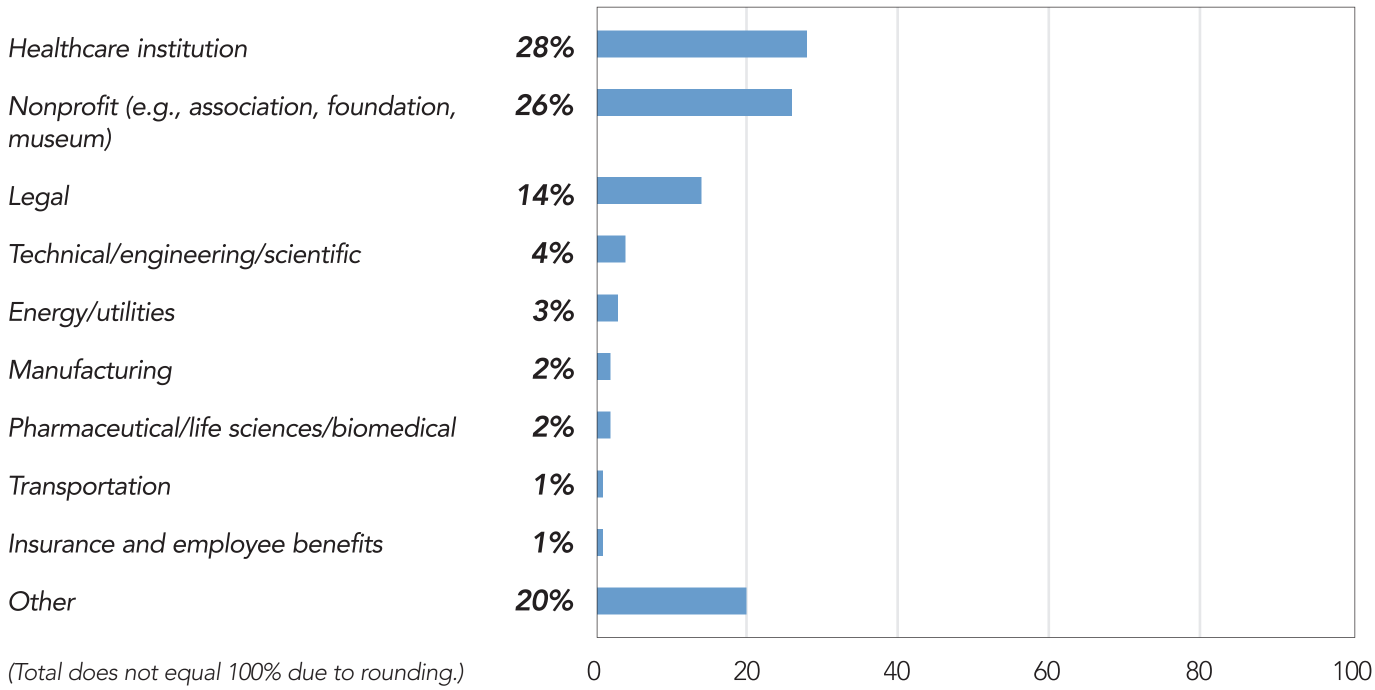
DEMOGRAPHICS—SPECIAL AND CORPORATE LIBRARIES

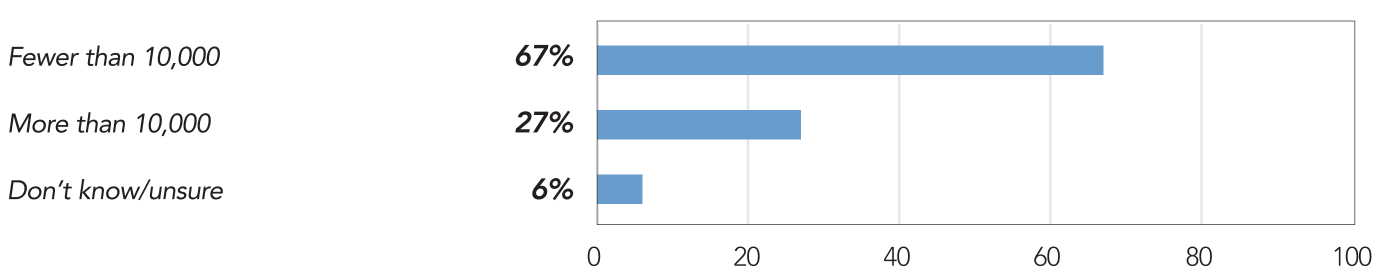
Figure 27: Types of Facilities Surveyed



Other types of libraries mentioned:

Library consortium/service organization (6)
Prison (4)
Research institute
Combined school/public library
Church library
News library
Library for the blind
Associated with the space program

Figure 28: Total Population of Community Served



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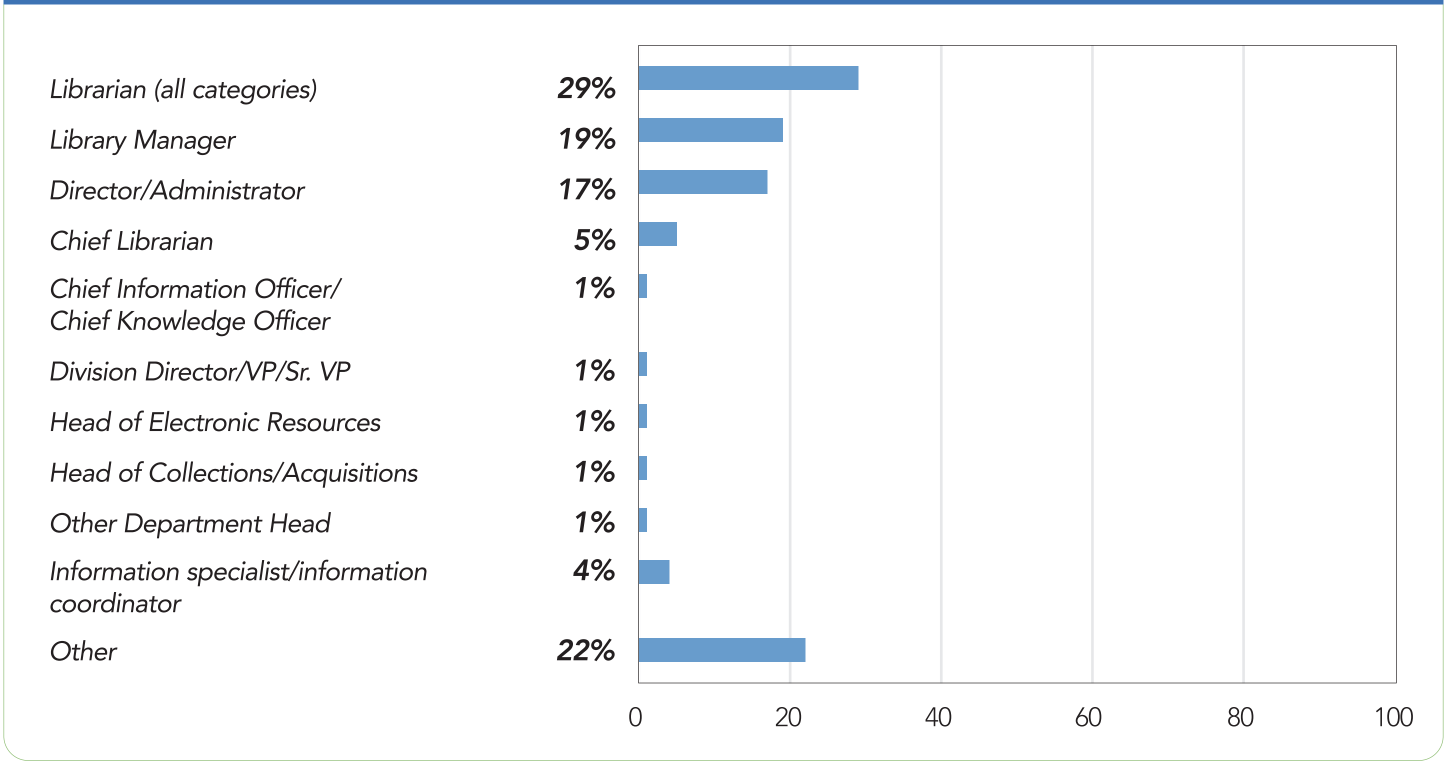
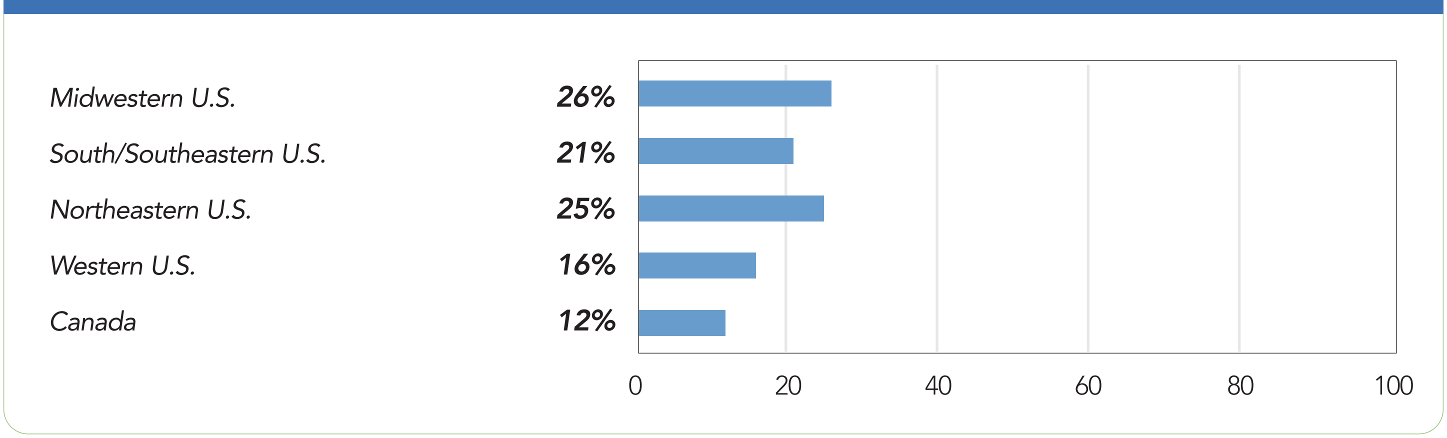
Data collection and analysis performed with SurveyMethods.

Figure 29: Respondents' Titles



(Total does not equal 100% due to rounding.)

Figure 30: Respondents by Region



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GOVERNMENT LIBRARIES

Half of government libraries suffered budget cuts over the past year, and many were uncertain as to future funding at the time of this survey. Nine-tenths cut back in one or more areas over the past year, led by cuts in subscriptions and staff training.

The LRG "Benchmark Study on 2011 Library Spending Plans" also explored trends at libraries run by federal and state or provincial agencies, as well as the armed forces. In this survey, 93% of the government libraries surveyed are federal or state agency libraries, and another 7% are affiliated with the armed forces. Among the 41 respondents are directors, administrators, managers, department heads, and librarians from the complete range of library settings and sizes. (For detailed demographic breakdowns, see Figures 52–54 at the end of this report.)

A majority of government agency survey respondents, 57%, reported they have some role in managing their government library's budget, and another one-fourth exercise influence over purchasing decisions. Just over one-third of respondents indicated that they have final say in budget matters. (See Figure 31.)

Overall, the previous 2010 fiscal year was difficult for many government libraries, with almost half reporting decreases in their budgets, versus 31% seeing increases. Most budgets will be more stable in the year ahead, though uncertainty continued to prevail at the time this survey was fielded in late 2010. For fiscal year 2011, 37% of respondents anticipate budget cuts, down from the 49% who saw cuts from 2009 to 2010. However, this will not translate into budget growth—the portion expecting upward movement in their annual budgets will actually decline from 31% to 18%. No respondents expect increases exceeding 10% of their current year's budgets. (See Figure 32.)

Respondents provided their total annual budgets for fiscal year 2010, including all aspects of operations and services—personnel, content acquisitions, collection development, operations, library systems, computers, A/V, media equipment, software, and services. (See Figure 33.)

Unlike other categories of libraries, government libraries operate fairly lean and mean when it comes to staffing levels, the survey finds. Only about one-fourth of typical library budgets go to personnel costs, while a majority of these libraries' funds are devoted to content and collections. (See Figure 34.)

The funding issues faced by agency libraries reflect the challenges that many cash-strapped government agencies face as a whole. As one respondent, an administrator of a defense-related facility library, put it: "It isn't just the library—we're experiencing funding cuts across the board. Every department in our agency is forced to do with less."

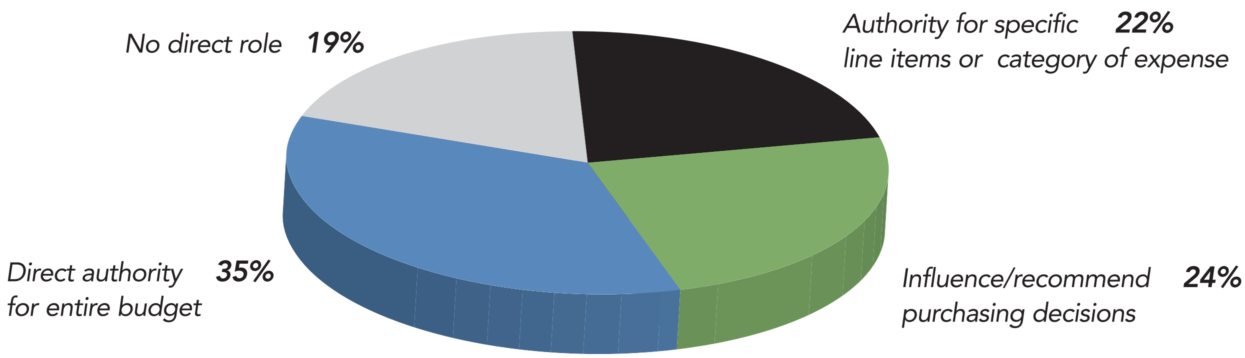
Close to 90% of respondents indicated that at least some of their budgets were cut or frozen in areas of their operations over the past year. When it came to containing costs, the first place government libraries looked was to put a hold on ongoing subscriptions—three-fourths indicate they were forced to end some of their offerings. In addition, a majority made cuts in travel and training for their staffs, while 44% looked to renegotiate fixed costs with their vendors. (See Figure 35.)

While cutbacks have been rife, there also have been areas receiving additional support, as indicated by at least eight out of 10 respondents. More government libraries are focusing on acquiring online subscriptions, as reported by 31% of respondents in this segment. At least one-fourth report that they have increased hiring or compensation for their staffs. Ebooks and digital content also received additional funding in one-fifth of the government libraries in the survey. (See Figure 36.)

One library manager with a large national agency echoed the challenge voiced by many library facilities. "We're attempting to maintain hours and adequate staff to accommodate a growing demand for basic in house services and online services," the respondent says.

Most respondents in the government segment of this survey are federal facilities, and receive their funding from federal sources. (See Figure 37.) While seven out of 10 government libraries belong to various consortia and networks, only a handful pursued increasing their participation as a way to cope with budget crunches. (See Figures 38–40.)

Figure 31: Respondents' Roles in Managing Government Library Budgets



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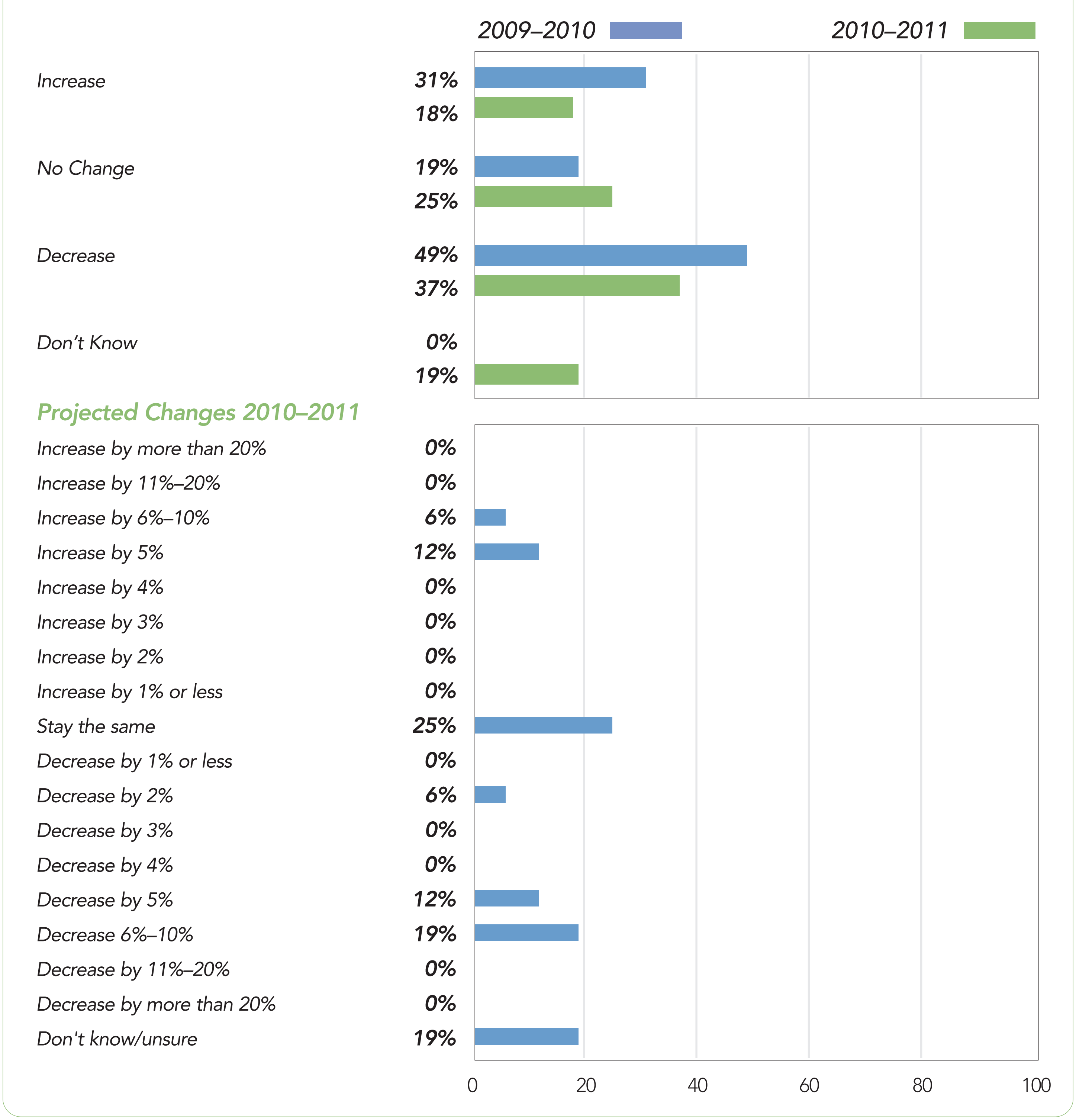
Data collection and analysis performed with SurveyMethods.

Figure 32: Changes in Government Library Budgets



(Totals may not equal 100% due to rounding.)

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Data collection and analysis performed with SurveyMethods.

Figure 33: Government Library Budgets

Average annual budget: $3,558,357

Figure 34: Percentage of Current Annual Government Library Budget Dedicated to Key Areas

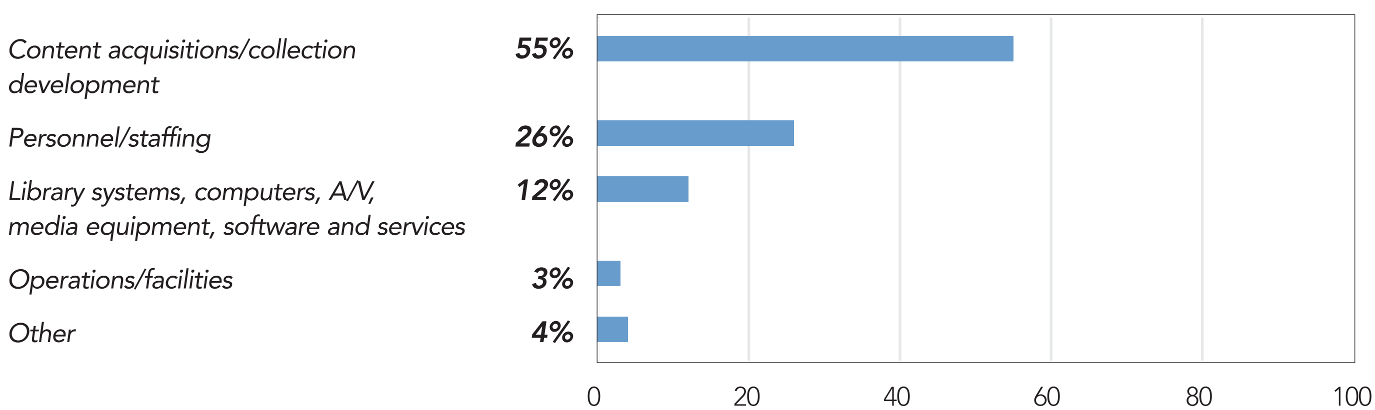

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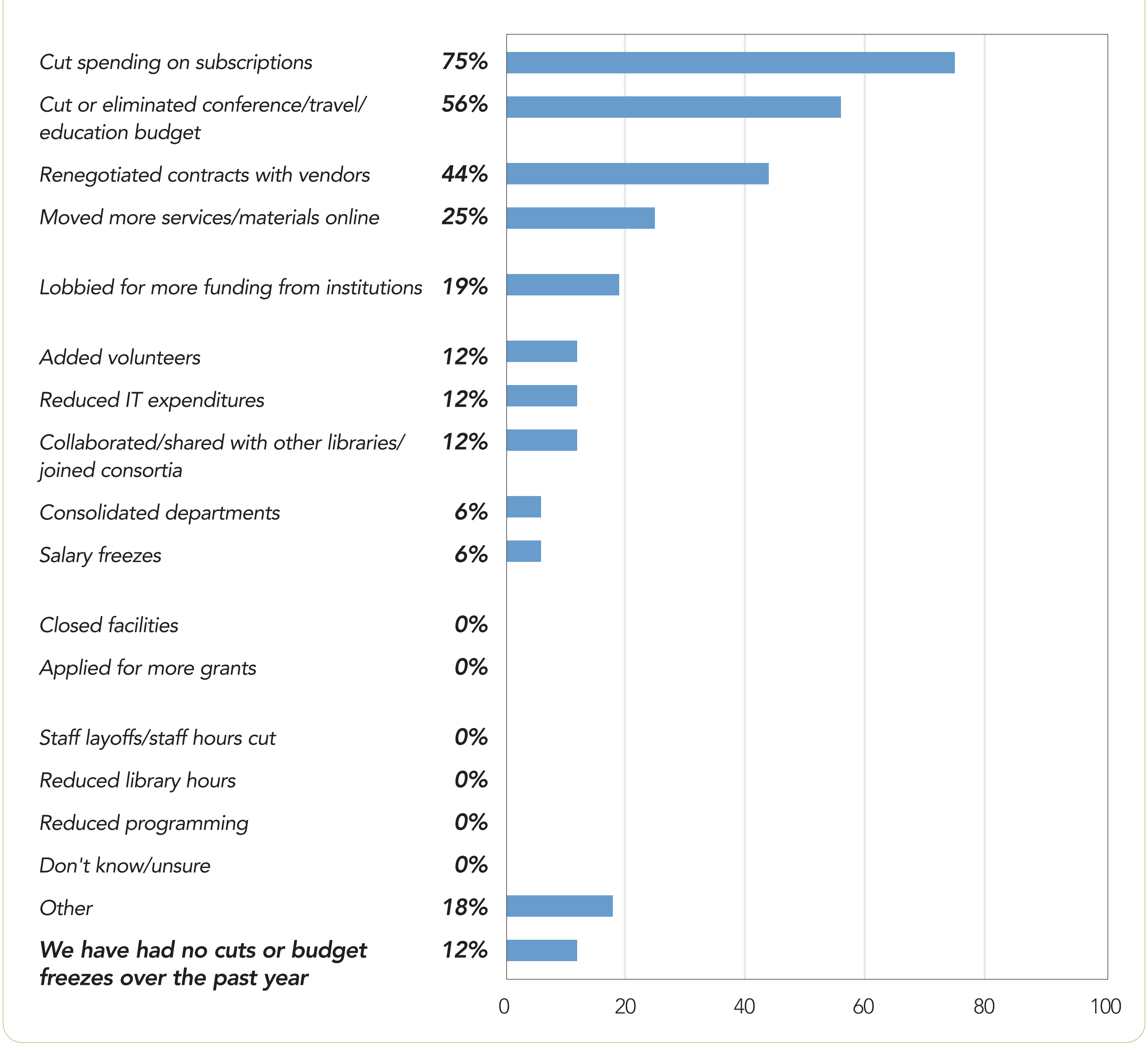
Figure 35: Actions to Manage or Respond to Budget Cuts/Freezes



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Data collection and analysis performed with SurveyMethods.

Figure 36: Areas Seeing Increased Spending or Support Over the Past Year

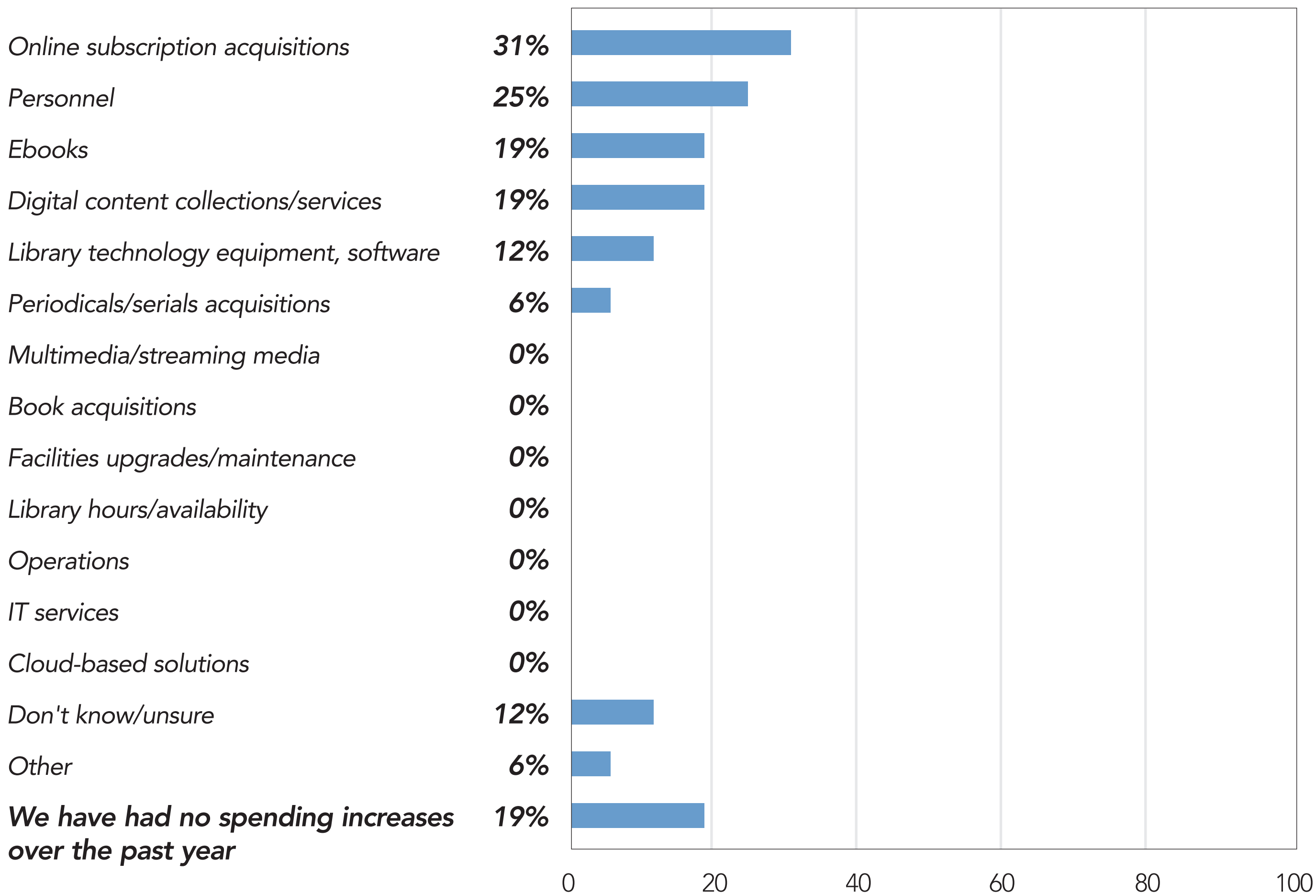
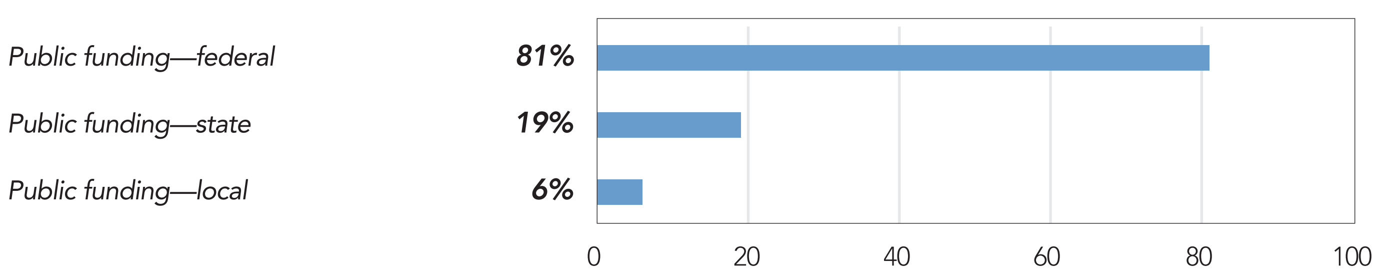


Figure 37: Primary Government Library Funding Sources



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Data collection and analysis performed with SurveyMethods.

Figure 38: Changes in Participation in Consortia/Networks by Government Libraries During Recent Economic Downturn

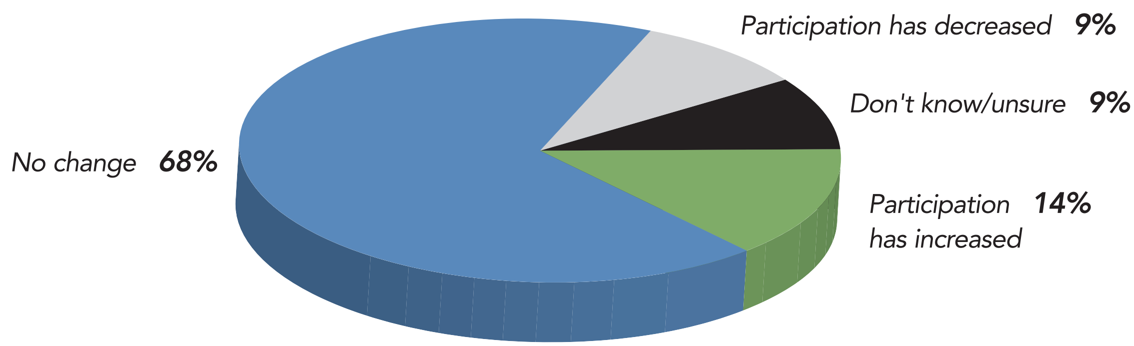

Figure 39: Number of Consortia or Network Memberships by Government Libraries

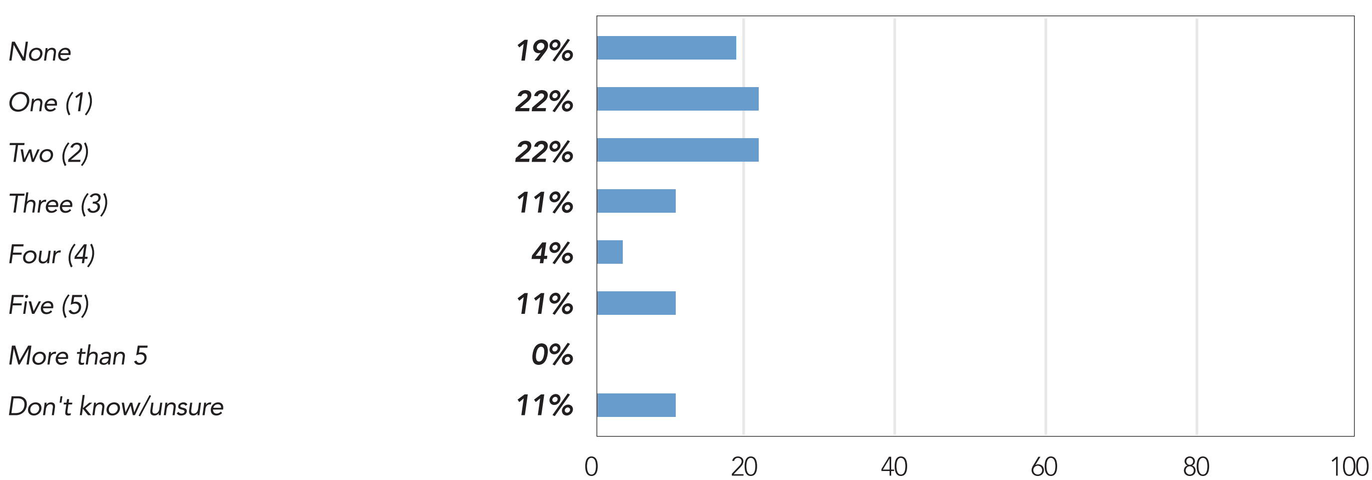

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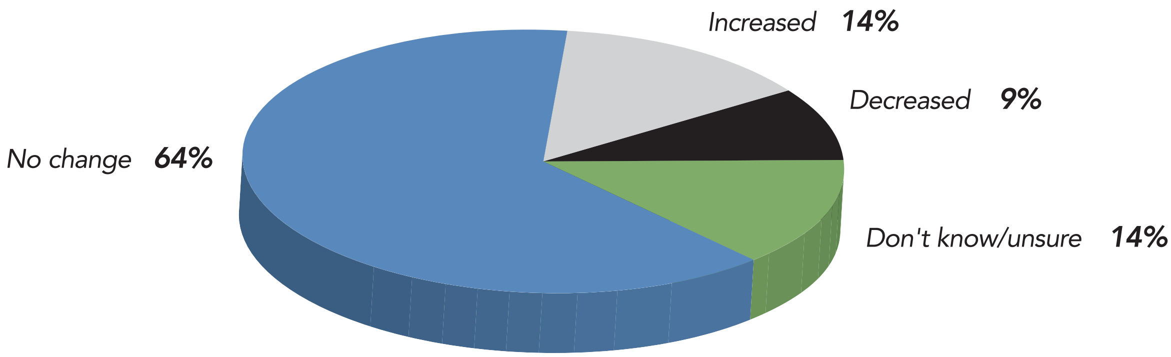
Figure 40: Change in Support from Consortia/Networks Over Past Year



(Total does not equal 100% due to rounding.)

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Data collection and analysis performed with SurveyMethods.

TECHNOLOGY TRENDS AT GOVERNMENT LIBRARIES

Print resources still consume a majority of annual content budgets for government libraries, although most growth in demand among libraries is for digital information and technology resources.

The main function that government libraries provide is the provisioning of technical information and training to constituents. Digital resources are also increasingly in demand, as cited by two-fifths of the respondents. (See Figure 41.)

It is also evident that there is rising demand for digital over print resources at many government agency libraries. Three-fourths of respondents report increased demand for materials in digital format, versus 40% for print. (See Figure 42.)

Of course, even in moving to digital resources, much of which is ostensibly lower cost, libraries still require specialized skills to make the transition. As one respondent, an information specialist at a major provincial agency in Canada, put it: "We need more staff to digitize. We need to give clients more desktop access. We are looking for ways to find money from the users rather than the population at large."

Print acquisitions still dominate the budgets of government libraries, the survey finds. A combined total of 65% of respondents' budgets are either dedicated to print serials and periodicals, or to printed books and other materials. One-third of library budgets, 31%, are dedicated to online databases and digital content collections, while only 1% of budgets are spent on video, audio, computer-based modules, or games. These patterns are fairly consistent across special/corporate library size ranges. (See Figure 43.)

For the most part, library spending on information technology hardware, software, and related IT services (not including online subscriptions) has increased or held steady over the past year. Seventy percent say spending on IT resources either increased, or stayed the same. This trend is expected to continue into the coming year with little change. (See Figure 44.)

Spending on online subscriptions has been robust, with eight out of 10 reporting increases or no change in spending in this area. Over the coming year, almost two-thirds of government libraries say they will be expanding their spending for online subscriptions. (See Figure 45.)

Despite a major push at the federal level to promote cloud computing as a software option, a relatively small handful of government libraries are embracing cloud computing, the survey finds. About 8% have public cloud resources that they are currently using, and only 1% have any plans to adopt cloud. (See Figure 46.)

In terms of existing technology products or services, online library catalog/OPACs are a standard for more than four-fifths of government agency libraries, present at 84% of sites. Technology tools and services such as web access, email services, and an ILS are also standard at most libraries in this segment. Government library managers were also asked to identify areas in which they intended to make new purchases or upgrades. ILSs are highest on the list of planned purchases or upgrades over the coming year. Internal networks or websites were most likely to be slated for upgrades, as indicated by close to one-third. (See Figure 47.)

Two out of three government libraries are getting involved with Web 2.0 technologies and methodologies—which encompass the use of online social media, as well as communication and collaboration tools such as blogs or wikis. Two-fifths are offering blogs and wikis to promote collaboration and knowledge-sharing. One-fifth are sharing library web pages and subject guides, such as LibGuides. Social networking access and communication—as seen with sites such as Facebook or LinkedIn—is not seen as a key strategy for government libraries, with only a handful moving in this direction. (See Figure 48.)

Government library managers were also asked what their most important strategic priorities are going forward into the new era. The majority see their leading mission over the months and years to come as that of providing the training necessary to take advantage of information access tools and technologies. A majority are also focused on ramping up the level of online services and resources they provide. (See Figure 49.)

Two items dominate the agendas of most government library managers over the next 5 years: maintaining services with tight budgets (74%), and migrating their print offerings to digital formats. Related to the latter challenge, a majority are also concerned with the ability of their facility to keep up with the ever-changing world of information technology. (See Figure 50.)

For one library, a major state agency resource center, the challenge is to be able to manage the transition to digital while keeping appropriate controls in place. "We need to make the database list of library books and materials available to all staff from their computers, while granting only the librarian the authority to change, modify, or alter the list. We need software to connect individual users from each PC with the database, with control of the database by the librarian only."

A majority of government libraries, 56%, now either have formal strategic plans that establish a road map going forward into this new era or are currently developing one. Another 19% are considering such plans. (See Figure 51.)

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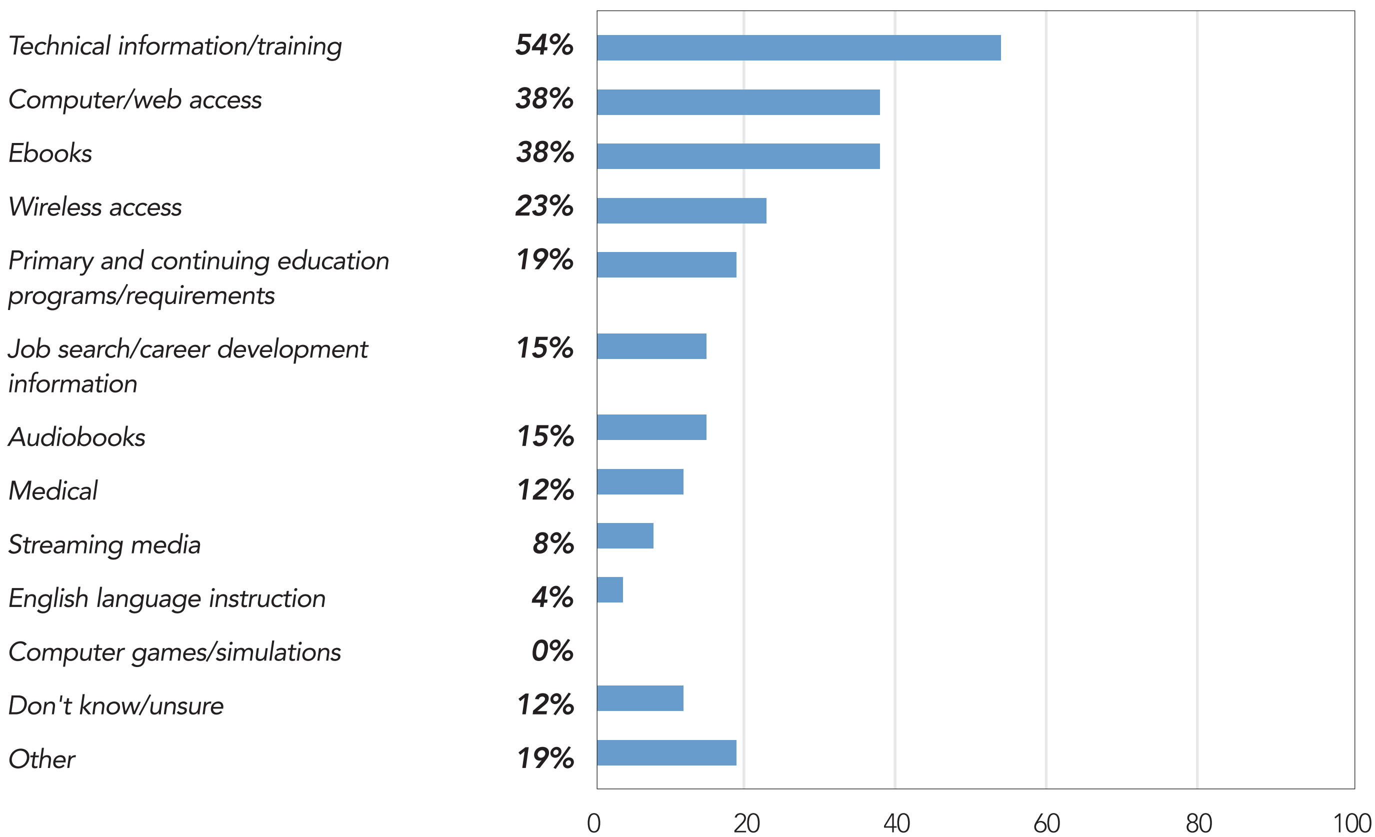
Data collection and analysis performed with SurveyMethods.

Figure 41: Where Patron Requests Have Increased Over the Past Year



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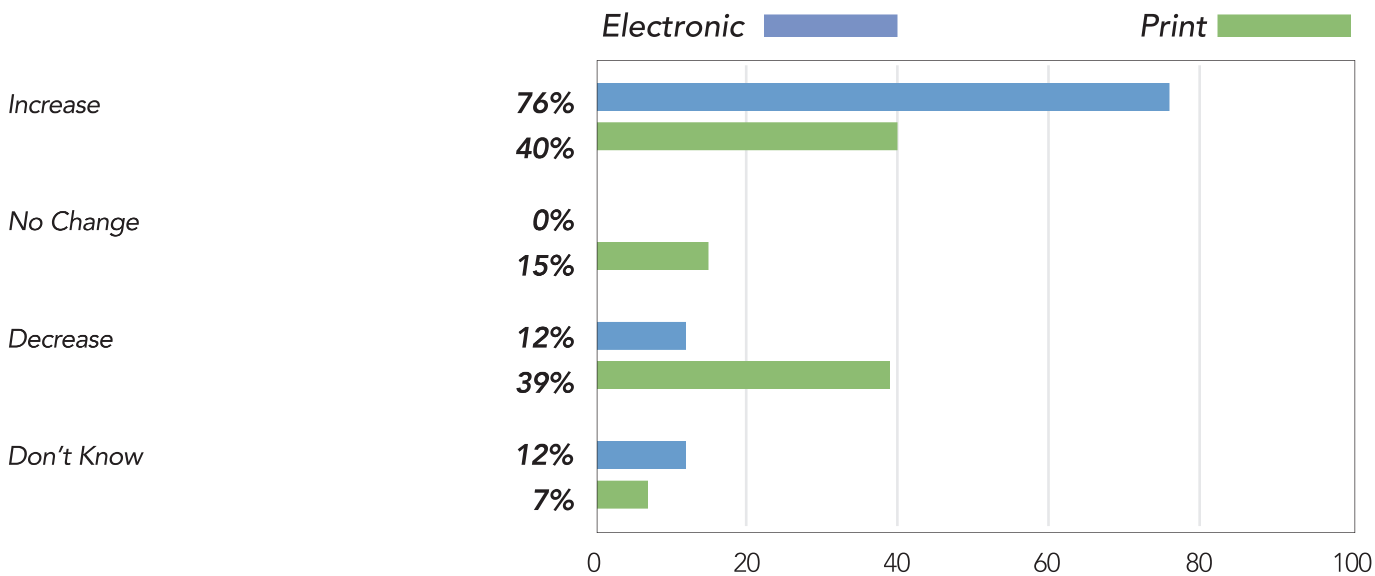
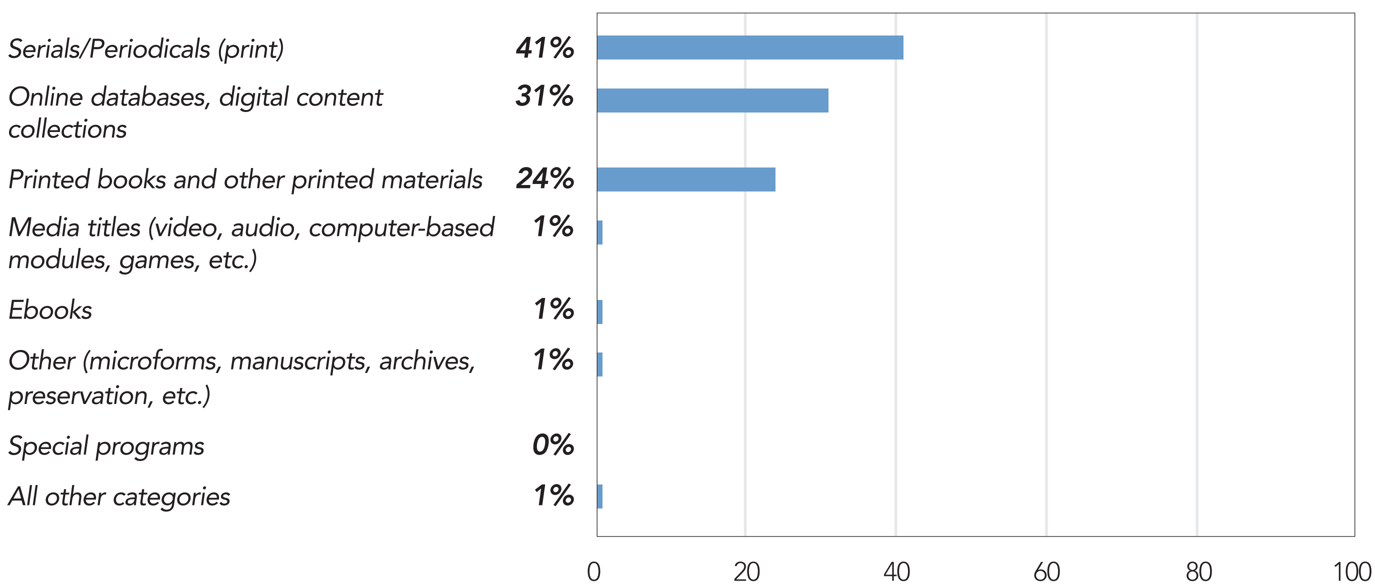
Data collection and analysis performed with SurveyMethods.

Figure 42: Change in Demand for Library Print and Electronic Offerings and Services Over the Past Year



(Totals may not equal 100% due to rounding.)

Figure 43: Content Acquisitions Portion of Respondents' Budgets



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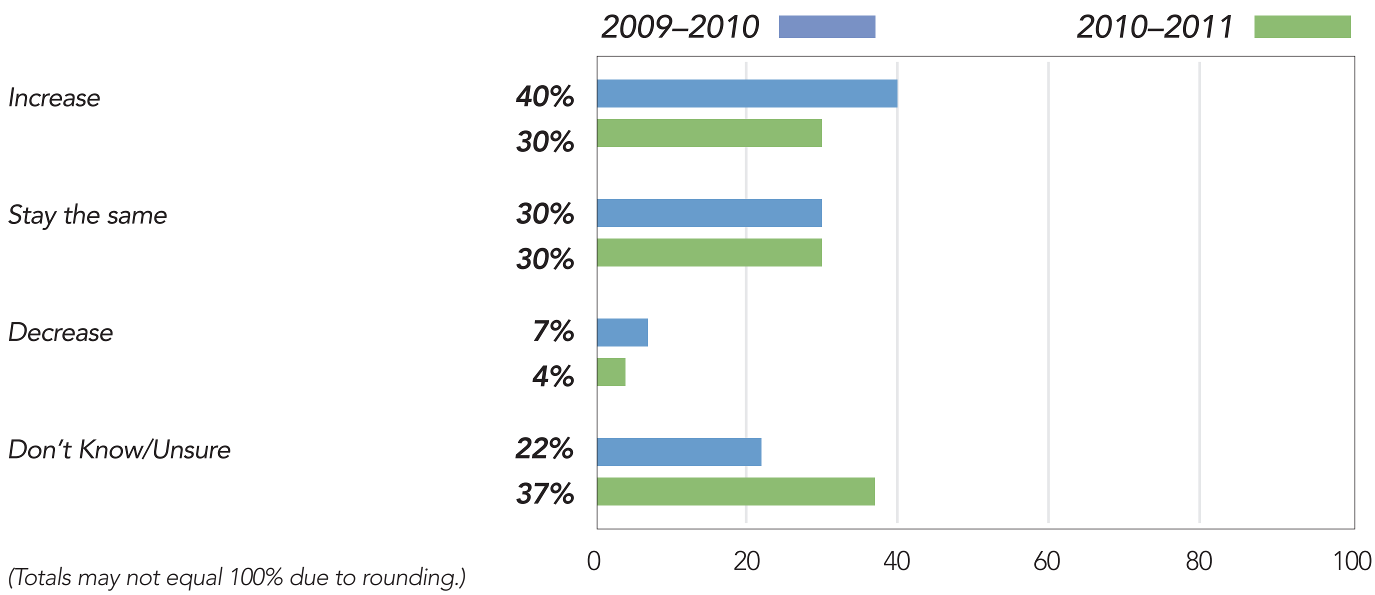
Data collection and analysis performed with SurveyMethods.

Figure 44: Change in Government Library Spending on Information Technology Hardware, Software, and Related IT Services (not including online subscriptions)



(Totals may not equal 100% due to rounding.)

Figure 45: Change in Government Library Spending on Online Subscriptions

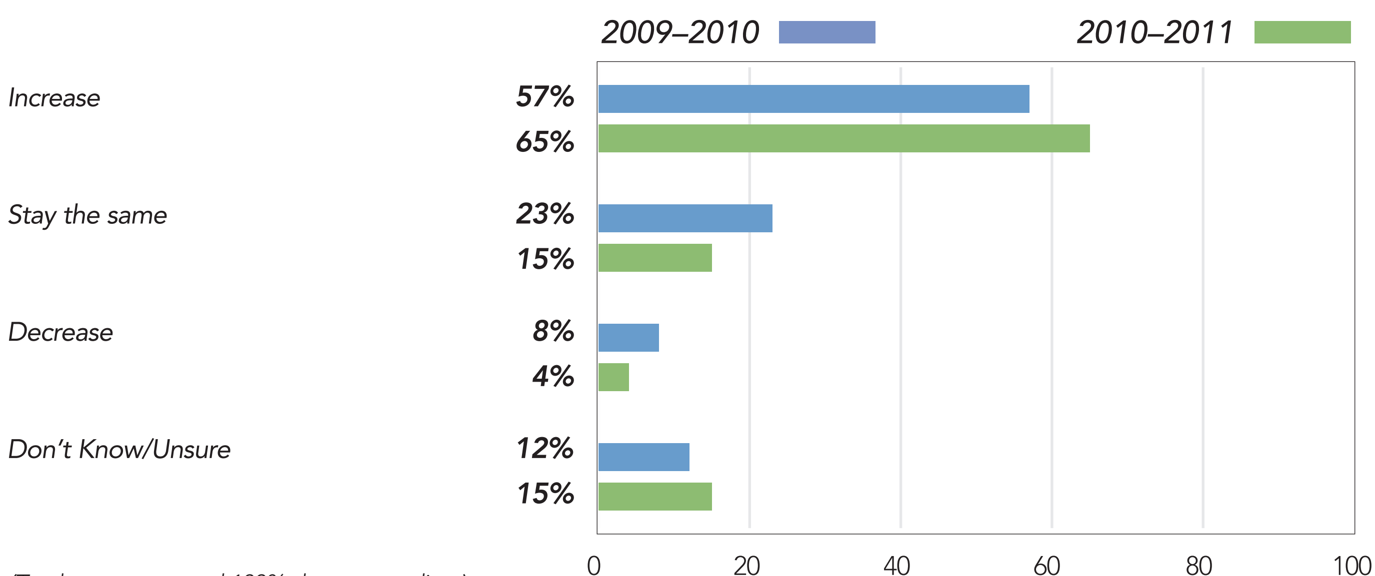


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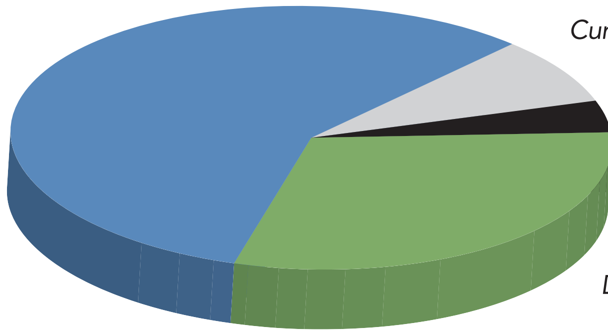
Figure 46: Percentage of Government Libraries Adopting Cloud Computing



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Data collection and analysis performed with SurveyMethods.

Figure 47: Information Technology Products/Services in Use/ Planned for Upgrade

	Currently in Use	Plan Upgrade in 2011
Online library catalog/OPAC	***84%***	***24%***
Intranet/extranet/website	***76%***	***29%***
Web-based (IM or email) reference service	***72%***	***12%***
Integrated Library System (ILS)	***72%***	***35%***
Audio/video teleconferencing	***48%***	***0%***
PCs/kiosks/laptops/mobile devices	***48%***	***6%***
LAN/WAN/wireless network	***44%***	***18%***
Electronic Resource Management Systems	***32%***	***12%***
Link resolvers	***32%***	***0%***
RFID check-in/check-out, inventory control	***16%***	***6%***
Authentication solutions	***16%***	***6%***
Ebook readers	***12%***	***18%***
Discovery services	***4%***	***6%***
Other	***8%***	***23%***

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Figure 48: Web 2.0 Services Being Adopted Among Government Libraries

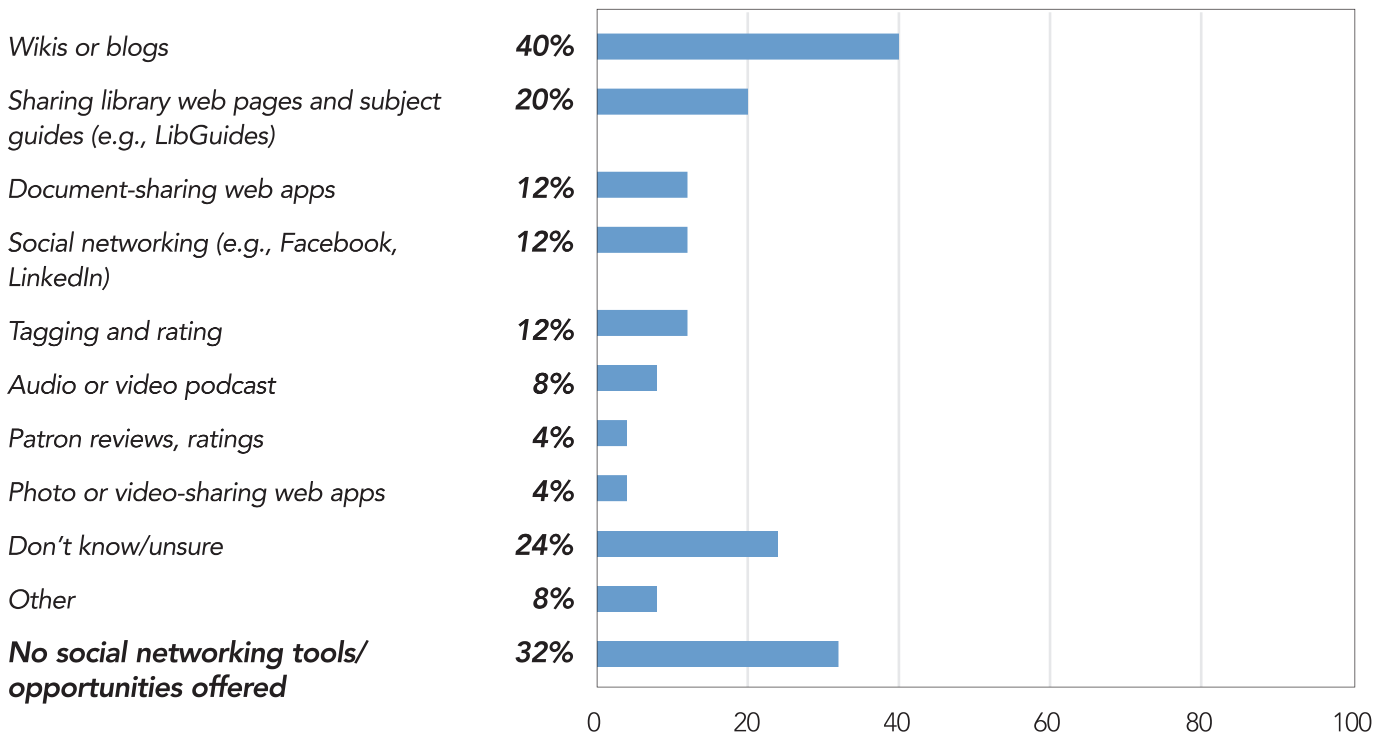

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Figure 49: Priorities for the Coming Year

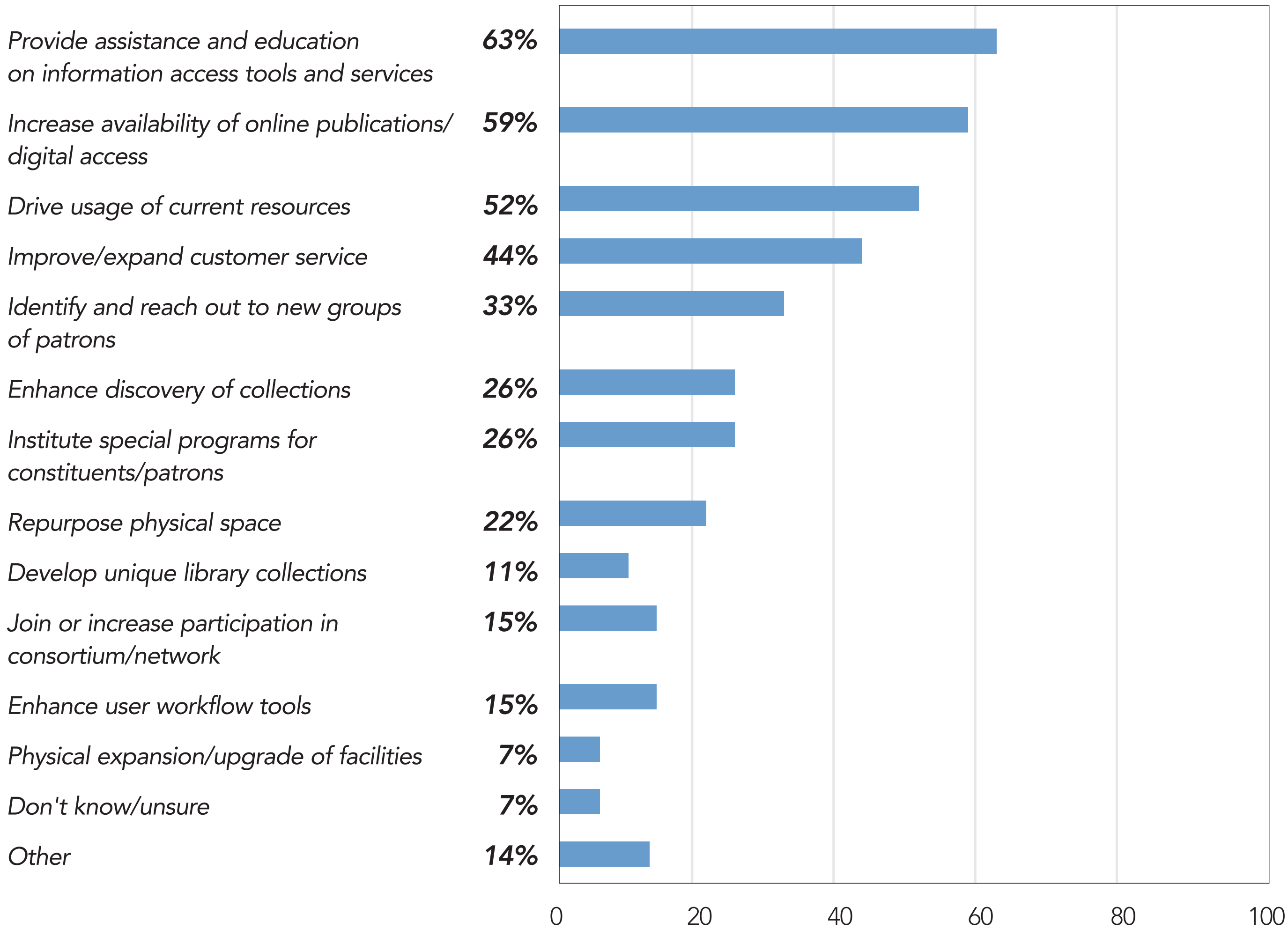

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Figure 50: Greatest Challenges Over the Next 5 Years

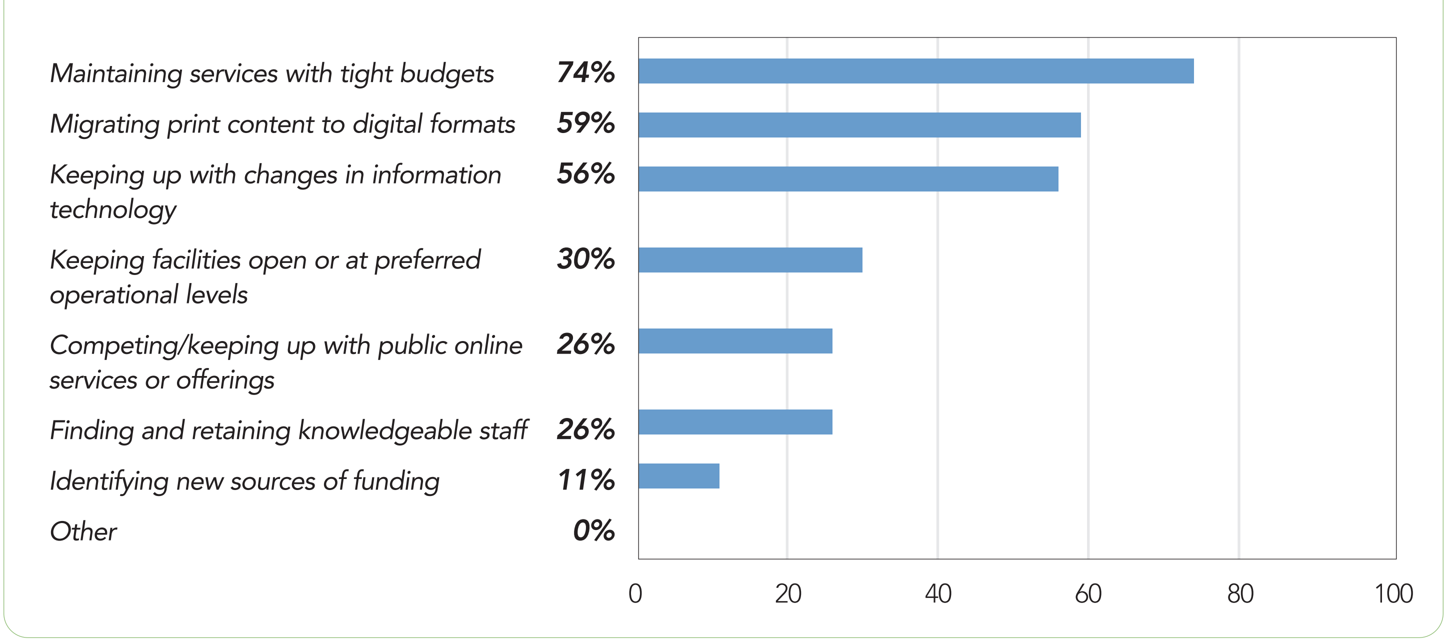
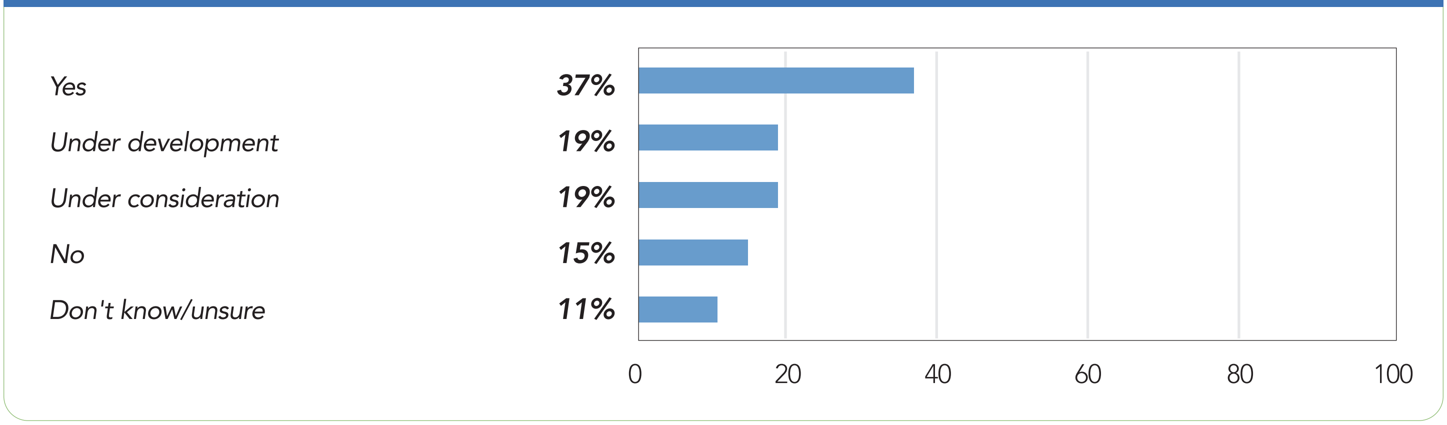


Figure 51: Library Strategic Plans



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DEMOGRAPHICS—GOVERNMENT LIBRARIES

Figure 52: Types of Government Institutions Surveyed

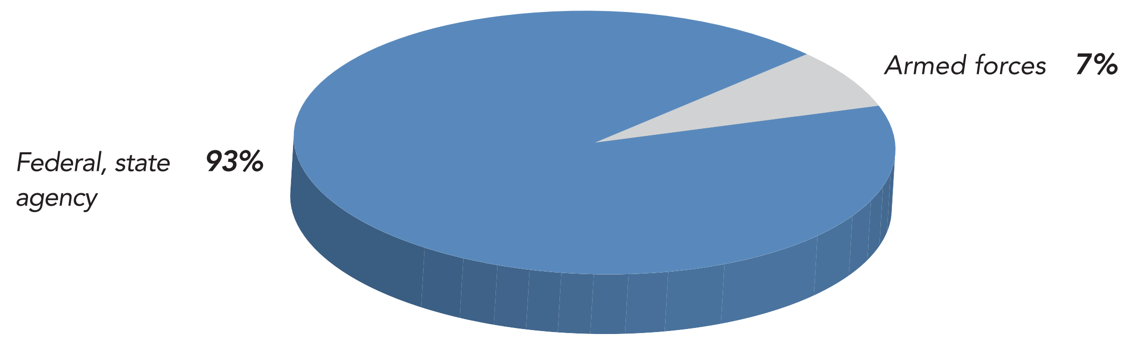

Figure 53: Respondents' Titles

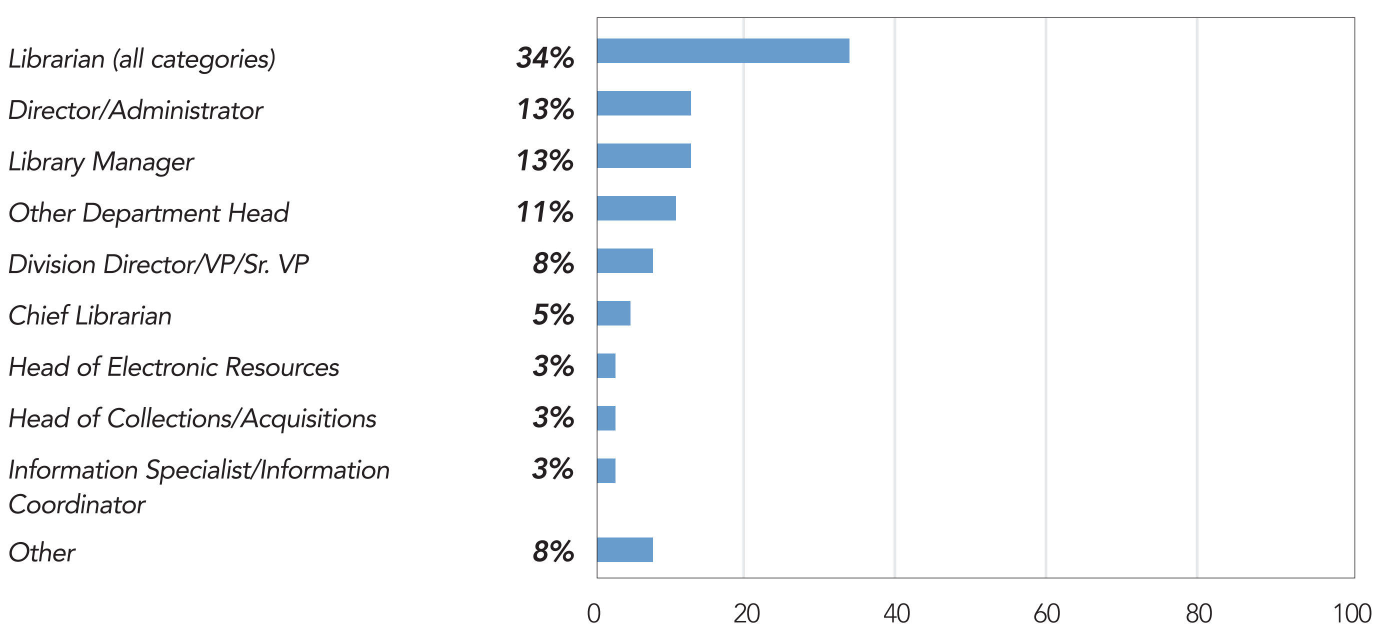

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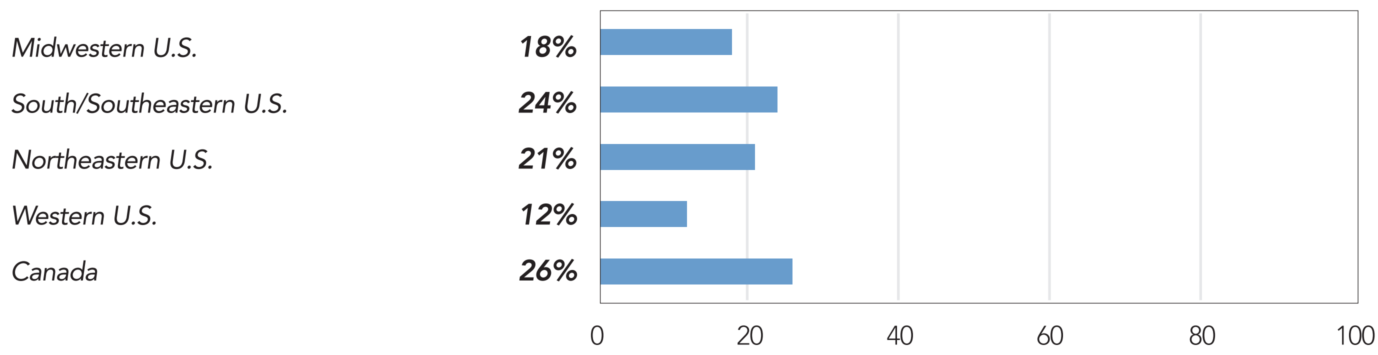
Figure 54: Respondents by Region



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METHODOLOGY

This survey is based on a sample of names drawn from Information Today, Inc.'s *American Library Directory* database. Respondents were solicited from email notifications to a list of 50,000 individuals at public, academic, government, and special libraries. Responses were collected between Oct. 15, 2010, and Oct. 31, 2010. As an incentive, respondents were offered a copy of the final results and entry into a drawing for an Apple iPad computer. A total of 1,201 valid surveys were gathered, of which 470 represented academic libraries.

ABOUT THE RESEARCHERS

LRG's "Benchmark Study on Library Spending" was conducted by Unisphere Research, the research arm of Information Today, Inc. and publisher of *Database Trends and Applications.* Since 2004, Unisphere has completed more than 80 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, Sybase, Symantec, Teradata, Informatica, VMware, and many others. Unisphere is uniquely capable of producing cogent market analysis through this experience and in its working relationship with the editors of Information Today, Inc.'s (ITI's) library of products.

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Owen O'Donnell, Editorial Director, *American Library Directory*
Catherine Barr, Editor, *Library & Book Trade Almanac*

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