

FUNDING AND PRIORITIES: ACADEMIC LIBRARIES

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2011 LIBRARY SPENDING PLANS

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EXECUTIVE SUMMARY

Academic libraries—typically shielded from economic disturbances by the institutions they serve—have not been immune to the double-barreled crisis sweeping the library world. Many academic libraries are running on tight budgets that keep getting tighter, and, as is the case with libraries across the spectrum, they are contemplating their future in the digital age. While the recent economic pinch has bottomed out, and some academic libraries anticipate upticks in their budgets, many are stepping up their efforts to share or deliver knowledge digitally.

These are some of the conclusions of a recent survey of 470 academic 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, 79% of the academic libraries surveyed are four-year or graduate-level college or university libraries, and another 21% are affiliated with community colleges, two-year colleges, or technical schools. Among the 470 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, and another 16% serve between 5,000 and 10,000 people. More than one-third of respondents service campuses with fewer than 2,500 people. (For detailed demographic breakdowns, see Figures 29–34 at the end of this report.)

Key findings from the survey include the following:

- While the past year has been difficult for many academic libraries financially, prospects are brighter for the year ahead. Larger academic libraries suffered the most severe cuts, while fewer cuts were seen among the smallest libraries, which already operate on relatively little funding. Next year, while larger institutions anticipate more rounds of cutbacks, relatively few small college libraries will be paring their budgets. Typical annual budgets currently fall in the range of \$1.2 million to just above \$3 million, and the largest portion of that funding goes to staffing.

- Four out of five academic libraries have cut back in one or more areas over the past year, led by cuts in subscriptions and staff training. Larger academic libraries are also putting more pressure on 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 academic libraries is for digital information and technology resources.
- Academic libraries maintained their information technology system budgets through the budget storm, and are growing their online subscription purchasing. One-third of academic libraries are also subscribing to, or considering use of, public cloud computing resources, particularly online communication and collaboration tools. Social media tools are also now part of most academic libraries’ offerings.
- From a strategic perspective, most academic libraries see the future as digital, and are directing efforts to increase accessibility and awareness of digital offerings.

One important challenge for academic libraries—which separates them from other library segments—is that they serve members of “Generation Y” (those born between 1980 and 2000), a group that grew up looking to the web and internet for their information needs. As one respondent, a department head of a small college library, put it, “Our future patrons are savvy in the use of technology. The big challenge is being able to foresee their preferences, and make sure that administrators—especially those in academia—recognize and value the importance and relevance that knowledge and information access has today.”

Another respondent, a department head of a large Texas-based university library, echoes this sentiment, stating that academic libraries need to be able to support an emerging online generation. “The single biggest challenge facing libraries is staying relevant to a much more technologically advanced and sophisticated patron base,” she says. “We need to be ready to deploy library services at a moment’s notice to whatever venue the patrons utilize for communication and information discovery.”

This is the challenge of the 2010s decade and, as this survey shows, many academic libraries are responding with new initiatives in technology access, online subscriptions, and cloud computing. However, financial support is always an issue.

ACADEMIC LIBRARIES' BUDGETS AND FUNDING

While the past year has been difficult for many academic libraries financially, prospects are brighter for the year ahead. Larger academic libraries suffered the most severe cuts, while fewer cuts were seen among the smallest libraries which already operate on relatively little funding. Next year, while larger institutions anticipate more rounds of cutbacks, relatively few small college libraries will be paring their budgets. Typical annual budgets currently fall in the range of \$1.2 million to just above \$3 million, and the largest portion of that funding goes to staffing.

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, 56%, reported they have some role in managing their academic library's budget and another third have influence over purchasing decisions. Just over one-fourth of respondents indicated that they have final say in budget matters. (See Figure 1.)

Overall, the previous 2010 fiscal year was difficult for many academic libraries, with 38% reporting decreases in their budgets, versus 24% seeing increases. About 15% reported severe cuts exceeding 10% of their previous annual budget.

According to responses, most budgets will be more stable in the year ahead. For fiscal year 2011, 22% of respondents anticipate budget cuts, down from the 38% 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 increase slightly from 24% to 27%. In most cases, the budget increases will be modest, not topping 5% of the current year's budget. (See Figure 2.)

Gaining support from school administrators is always a challenge. As one respondent, a librarian with a large community college, put it, "Our college administration has put a hiring freeze on filling library and other faculty jobs, though we have grown tremendously, and library use and instruction has soared." She adds, "We can meet the challenges we know are here and others that are coming if we are allowed to have even close to a full staff. But we are missing two FT clerical and a FT librarian position, plus two other FT positions."

Another library manager also describes how his college administration isn't providing enough essential support to the library. "Funding sources are drying up; but our administration is too enmeshed in the business model to understand educational and library opportunities," he

relates. "We need leadership who understands that true education and library value does not reside in more sports programs or whiz-bang technology procurement. If their emphasis returned to core education, libraries would flourish."

Most of the financial pain among academic libraries has been concentrated within larger establishments. While more than half of the largest libraries (serving student populations greater than 10,000) report cuts over the past year, only about one-third of their smaller counterparts have had to cut back. Over the coming year, most of the pain will continue to be felt within the largest academic settings—larger facilities are more than twice as likely to be making budget cuts than their smaller counterparts with fewer than 5,000 students. (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 or multi-campus systems
- Entire multibranch or multi-campus systems

Size of population served makes a difference in budgets. For example, libraries on smaller campuses (serving fewer than 2,500 students) report annual budgets of about \$900,000, on average. By contrast, libraries serving more than 10,000 people average close to \$4 million a year. (See Figure 4.)

Typically, personnel and staffing represents the largest slice of annual academic library budgets—on average, 43% of respondents' current budgets are spent on human resources. Another 34% of the annual budget goes to content acquisitions and collection development. On average, about 11% of budgets are directed to information technologies, ranging from Integrated Library System (ILS) systems to media equipment. Only 6% of annual budgets are dedicated to operations and facilities—these are likely to be expenses assumed by the college or university as a whole. These investments are fairly uniform across all sizes of academic libraries. (See Figure 5.)

Figure 1: Respondents' Roles in Managing Academic Library Budgets

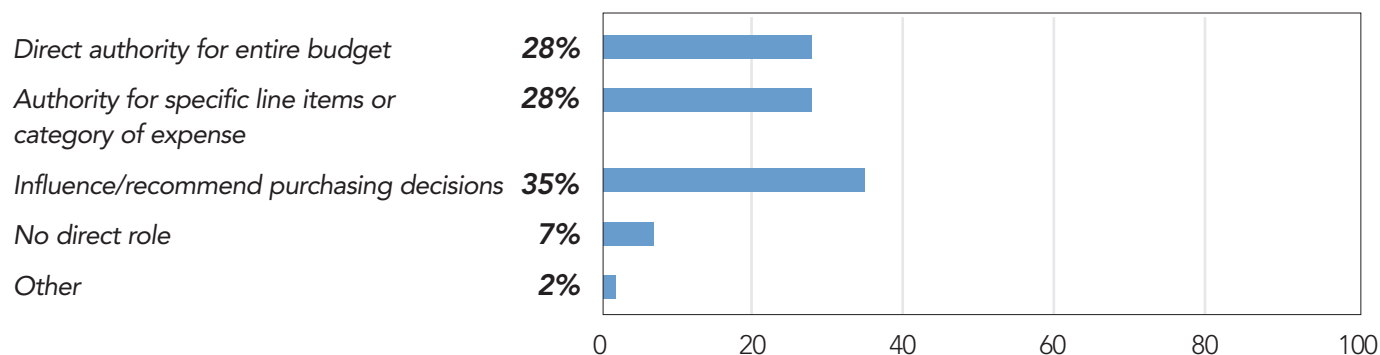
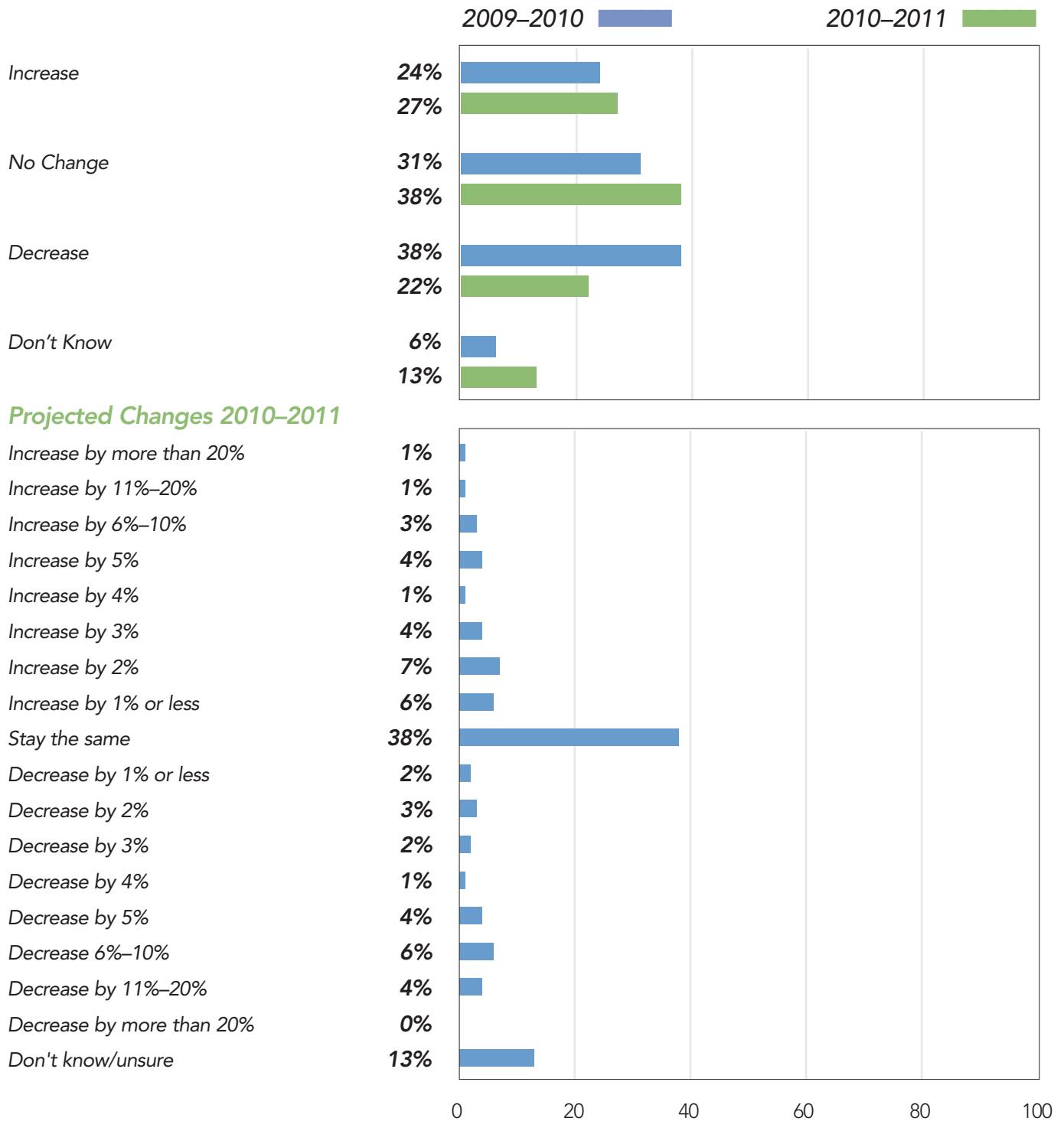


Figure 2: Changes in Academic Library Budgets



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

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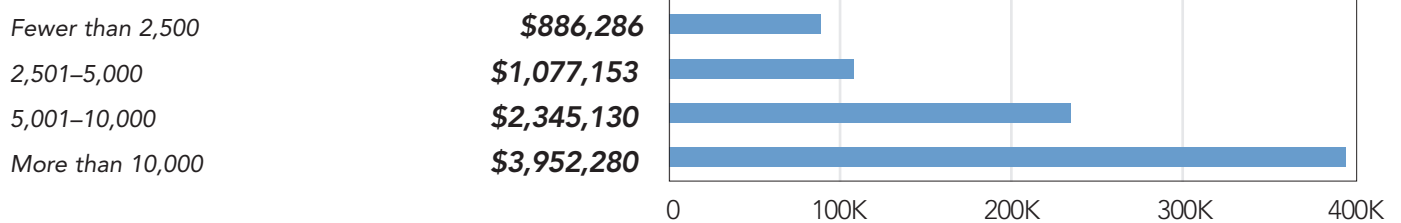
Figure 3: Who's Cutting Back? Academic Libraries Cutting Budgets—By Population Served

	<2,500	2,500–5K	5–10K	10K+	AVG.
2009–10	37%	30%	27%	51%	38%
2010–11	16%	14%	24%	42%	22%

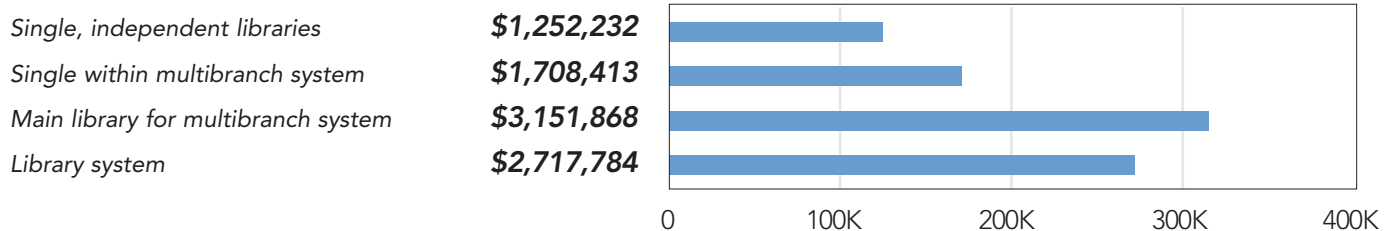
Figure 4: Academic Library Budgets

AVERAGE ANNUAL BUDGET: \$1,904,660

AVERAGE ANNUAL ACADEMIC LIBRARY BUDGET—BY SIZE OF STUDENT POPULATIONS SERVED



AVERAGE ANNUAL ACADEMIC LIBRARY BUDGET—BY TYPE OF LIBRARY



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Figure 5: Percentage of Current Academic Public Library Budget Dedicated to Key Areas

	<2,500	2,500–5K	5–10K	10K+	AVG.
<i>Personnel/staffing</i>	42%	40%	47%	45%	43%
<i>Content acquisitions/ collection development</i>	36%	34%	29%	34%	34%
<i>Library systems, computers, A/V, media equipment, software and services</i>	12%	9%	11%	10%	11%
<i>Operations/facilities</i>	5%	8%	7%	7%	6%
<i>Other</i>	5%	9%	5%	4%	6%

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

MANAGING IN A NEW ERA

Four out of five academic libraries have cut back in one or more areas over the past year, led by cuts in subscriptions and staff training. Larger academic libraries are also putting more pressure on vendors to renegotiate contracts for more favorable terms.

Eighty 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 came to containing costs, the first place academic libraries looked was to put a hold on ongoing subscriptions—a majority indicate they were forced to end some of their offerings.

As noted in the previous section, staffing and human resources was the largest budget area for academic libraries, and this is where many tightened up their spending. Close to half made cuts in travel and training for their staffs, and 41% were forced to freeze salary increases. While many of these cutbacks were made across the board among all sizes of academic libraries, the largest institutions were the most prone to salary freezes—54% of those serving institutions with more than 10,000 students froze salaries, versus 40% of their smallest counterparts. When it came to outright cuts in staff hours, however, smaller institutions were more likely to be feeling this pain. (See Figure 6.)

One respondent from a college library in Texas reports that while the facility has not experienced actual staff layoffs or cuts, still, a “hiring freeze is in place for a position that opened up a year ago. It’s to be the first position restored on campus, but only when our enrollment stabilizes.”

Larger institutions were far more likely to be engaging with vendors to negotiate lower prices to meet their limited budgets (41%, versus 18% overall). This is a strategy driven by necessity in a time of budget squeezes. As one respondent, a manager with a large Western law school, put it: “Declining budgets in a time of huge price appreciation is our single biggest challenge. Some solutions include very hard-nosed negotiations with vendors, resource-sharing arrangements with other local libraries, consortia buying/negotiating, migrating users from two formats to just one.”

Another respondent, an administrator with a small Southern institution, adds, “As prices soar and library budgets stay the same or decrease, libraries and librarians will have to find out how they can offer resources and services to their patrons and stay within their budgets. I believe it will be up to vendors to

offer their services and products at prices that libraries can afford. Another challenge will be offering things that patrons want in the ways that they want them such as electronically.”

Still another respondent, the head of electronic resources with a Northeastern college, admits that academic libraries are in a tight spot. “If the economy is improving, libraries and academic institutions are slower to improve. Keeping up with tech advances requires money that we don’t have,” the respondent says. “Rapid changes in ILSes, Web 2.0 services, and open source offerings require tech skills that some librarians don’t have time to keep up with. Budget cuts keep us in a make-do mode. We’re reluctant to make changes now, if technology will change again in the near future, requiring more change. We need reliable, unbiased information to make decisions.”

Acquisitions of subscriptions and ebooks were most in evidence among mid-size academic libraries through the past year. More than two-fifths of the libraries in the 5,000-10,000 student population category had ramped up ebook investments, compared to only 19% of the largest institutions in the survey. (See Figure 7.)

Where do most funds come from? Of course, most academic libraries look to direct funding from their institutions to support their operations. About one-third, presumably state-affiliated colleges and universities, also look directly to state funding sources.

There is also a segment of academic libraries that raise money outside of the university or state system. One out of five respondents look to gifts and donations to keep their services going. Smaller academic libraries are more inclined than their larger counterparts to rely on gifts and donations. Endowments are a more robust source for the largest library segment in the survey. Few, if any, academic libraries turn to fundraising events or outside corporate funding. (See Figure 8.) Eight percent of respondents from academic libraries say they also received grants as part of their income streams for the past year. In most, these were either government grants or grants from private foundations. (See Figure 9.)

As the economy soured in 2008 and 2009, a number of libraries ramped up their appeals for gifts, donations, and grants to support programs. At least one out of five report they turned to these additional sources as a result of the economic downturn. Larger libraries have been the most aggressive on seeking grants and gifts. (See Figure 10.)



One solution available to libraries is pooling their efforts in various consortia or networks. Materials are shared and costs mitigated across these networks, which are often nonprofit membership associations. The survey finds that more than one-fifth of academic libraries have increased their participation in consortia during recent economic times. (See Figure 11.)

More than eight out of 10 respondents to the survey report their libraries are part of one or more consortia or networks. (See Figure 12.) Leading consortia mentioned by respondents include OCLC, Lyris, Amigos Library Services, TexShare, Waldo, MCLS, MLS, Minitex, Mobius, Galileo, SELC, and Infolink.

Respondents have had mixed levels of support from the consortia of which they are a part. Just under one-fourth of

academic libraries in the survey state that their support from consortia has increased, but another 16% report decreased support. (See Figure 13.)

The bottom line is effectively managing and measuring library progress. As one respondent, a director of a large university library in Texas, put it, “The biggest challenge is proving the relevance of libraries. 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.”

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

	<2,500	2,500–5K	5–10K	10K+	AVG.
Cut spending on subscriptions	54%	57%	46%	63%	55%
Cut or eliminated conference/ travel/education budget	47%	51%	46%	51%	48%
Salary freezes	40%	39%	34%	54%	41%
Moved more services/materials online	29%	35%	29%	46%	33%
Renegotiated contracts with vendors	18%	20%	20%	41%	23%
Applied for more grants	7%	14%	29%	20%	14%
Staff layoffs/staff hours cut	28%	12%	20%	22%	22%
Reduced library hours	12%	16%	29%	24%	18%
Collaborated/shared with other libraries/joined consortia	15%	14%	26%	27%	19%
Lobbied for more funding from institutions	8%	16%	20%	34%	17%
We have had no cuts or budget freezes over the past year	16%	12%	20%	7%	14%
Consolidated departments	8%	8%	17%	27%	13%
Reduced IT expenditures	8%	2%	9%	22%	9%
Reduced programming	8%	2%	6%	5%	6%
Added volunteers	9%	10%	0%	0%	6%
Closed facilities	2%	0%	3%	5%	2%
Don't know/unsure	4%	10%	3%	5%	6%
Other	6%	4%	3%	12%	6%

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

	<2,500	2,500–5K	5–10K	10K+	AVG.
Online subscription acquisitions	29%	29%	41%	27%	30%
Ebooks	17%	21%	44%	19%	22%
Digital content collections/services	18%	10%	18%	16%	16%
Personnel	11%	17%	15%	8%	12%
Multimedia/streaming media	12%	8%	15%	8%	11%
Library technology equipment, software	10%	6%	15%	11%	10%
Book acquisitions	8%	6%	3%	3%	6%
Periodicals/serials acquisitions	8%	2%	6%	5%	6%
Facilities upgrades/maintenance	6%	0%	6%	8%	5%
Library hours/availability	4%	6%	9%	5%	5%
Operations	4%	6%	0%	3%	3%
IT services	2%	2%	3%	0%	2%
Cloud-based solutions	2%	0%	0%	3%	1%
We have had no spending increases over the past year	31%	29%	18%	30%	28%
Don't know/unsure	6%	15%	6%	16%	10%
Other	1%	0%	0%	10%	2%

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Figure 8: Primary Academic Library Funding Sources

	<2,500	2,500–5K	5–10K	10K+	AVG.
University/school funding	88%	84%	69%	56%	78%
Public funding–state	15%	16%	54%	73%	33%
Gifts and donations	21%	14%	20%	17%	19%
Endowments	18%	12%	11%	24%	17%
Grants	4%	10%	11%	12%	8%
Public funding–local	4%	2%	17%	15%	8%
Public funding–federal	2%	2%	11%	7%	5%
Special fundraising events	2%	4%	0%	2%	2%
Fee-based services	2%	0%	0%	5%	2%
Corporate funding	2%	0%	0%	0%	1%
Don't know/unsure	4%	2%	3%	2%	3%
Other	2%	0%	2%	2%	1%

Figure 9: Grants Received by Academic Libraries
(among libraries receiving grants)

	<2,500	2,500–5K	5–10K	10K+	AVG.
Government grants	50%	60%	50%	100%	67%
Grants from foundations	75%	20%	50%	40%	44%
Grants from corporations	25%	20%	0%	20%	17%
Grants from private individuals	25%	0%	0%	0%	6%
Other	0%	0%	50%	20%	11%

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Figure 10: Library Funding Sources Identified or Increased During Recent Economic Downturn

	<2,500	2,500–5K	5–10K	10K+	AVG.
<i>Gifts and donations</i>	16%	26%	21%	32%	22%
<i>Grants</i>	11%	28%	39%	19%	21%
<i>University/school funding</i>	14%	19%	27%	16%	18%
<i>Endowments</i>	11%	2%	9%	14%	9%
<i>Public funding–state</i>	0%	5%	6%	8%	4%
<i>Fee-based services</i>	4%	0%	0%	5%	3%
<i>Public funding–local</i>	0%	0%	3%	8%	2%
<i>Special fundraising events</i>	3%	0%	3%	3%	2%
<i>Corporate funding</i>	0%	0%	0%	0%	0%
<i>Public funding–federal</i>	0%	0%	3%	3%	1%
<i>Don't know/unsure</i>	46%	40%	33%	30%	29%
<i>Other</i>	11%	2%	6%	10%	8%

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Figure 11: Changes in Participation in Consortia/Networks by Academic Libraries During Recent Economic Downturn

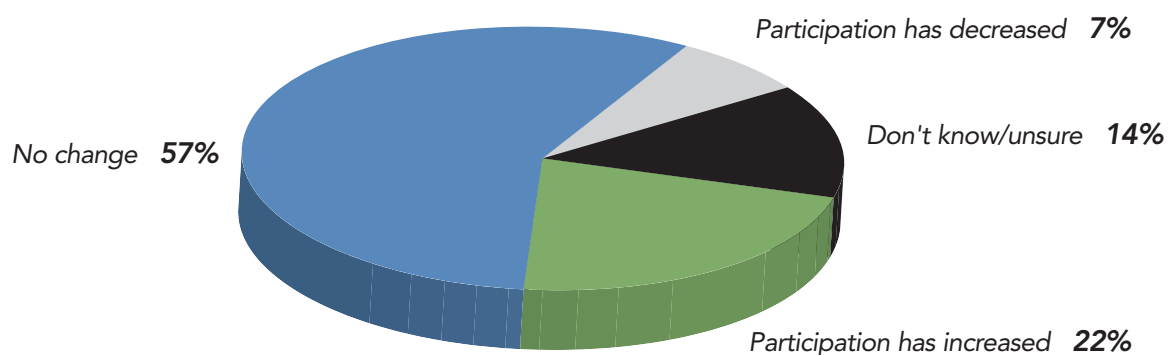
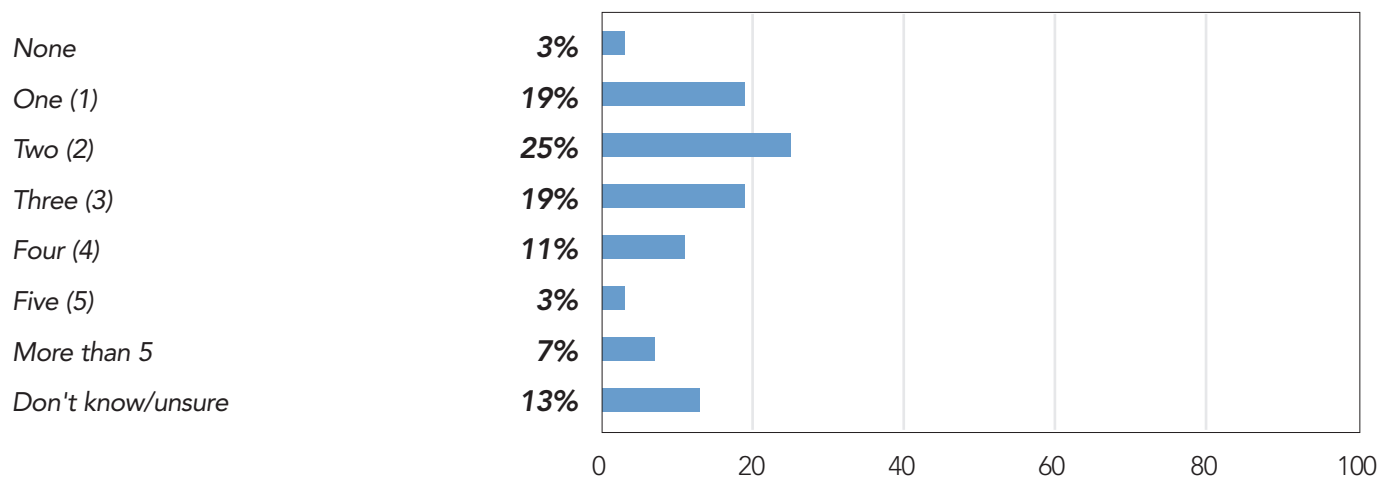
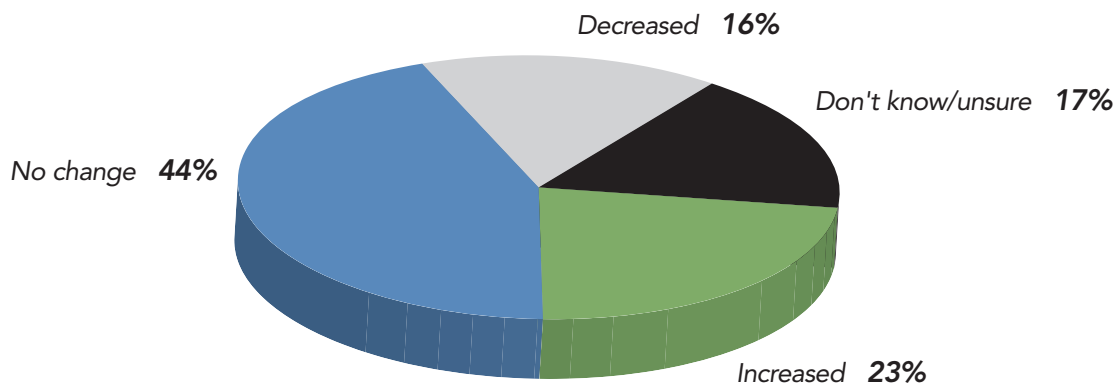


Figure 12: Number of Consortia or Network Memberships by Academic Libraries



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

Figure 13: Change in Support From Consortia/Networks Over Past Year



DIGITAL AND ELECTRONIC RESOURCES

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

Students and faculty are turning to their institutions' libraries in a big way for technology-based resources, respondents report. Seven out of 10 respondents indicate that they have seen a surge in patrons seeking wireless internet access, which may be a reflection of the increased proliferation and ubiquity of mobile and personal computing. In a related trend, 56% report that more patrons over the past year have been seeking basic computer and web access. Larger academic libraries have also registered increased demand for ebooks over the past year, pointing to an increasing shift from print to digital. (See Figure 14.)

The rising demand for digital over print resources is also confirmed in another survey question in which 77% of respondents report increased demand for materials in digital format, versus only 25% for print. Conversely, two-fifths report decreased demand for print materials, versus no decrease in demand for digital. This reflects the preferences of Generation Y—individuals born between 1980 and 2000—who grew up consuming most of their resources from computers and the internet. (See Figure 15.)

Among academic libraries, print acquisitions still edge out digital acquisitions by a slim margin within content acquisition budgets. In total, close to half of the respondents say percentages

of their budgets either are dedicated to printed books and materials (25%), or print serials and periodicals (23%). Slightly more than one-third of academic library budgets, 35%, is dedicated to online databases and digital content collections, while another 5% of budgets is spent on video, audio, computer-based modules, or games. These patterns are fairly consistent across academic library size ranges. (See Figure 16.)

“Managing the switch from print to electronic access, and making sure that libraries and librarians will still have a role in getting patrons the information they need” was cited as a key concern by one respondent, a librarian with a Midwestern university. “As for how to meet this, my best idea is to keep up to date with online resources, refine online searching skills, and figure out how to blend them into the school’s learning and teaching needs, and its overall mission.”

One respondent described how his library’s financial situation is affecting its ability to serve the university. “Budget shortfalls are damaging the core mission of our library. We have lost a lot of funding toward print resources, yet instructors assign coursework that relies heavily on print resources,” the librarian said. “Some instructors have not fully embraced the concept of database use and fail to realize how limited our print collection has become. The school is taking on new projects and curricula that we cannot adequately support due to lack of money and having to keep outdated materials just to fill our shelves.”

Figure 14: Where Patron Requests Have Increased Over the Past Year

	<2,500	2,500–5K	5–10K	10K+	AVG.
Wireless access	68%	69%	74%	79%	72%
Computer/web access	60%	46%	48%	67%	56%
Ebooks	24%	52%	61%	54%	44%
Streaming media	22%	31%	46%	33%	30%
Technical information/training	22%	26%	22%	36%	26%
Medical	16%	20%	24%	13%	18%
Job search/career development information	9%	9%	20%	11%	11%
Audiobooks	8%	11%	22%	10%	11%
Primary and continuing education programs/requirements	6%	6%	13%	10%	8%
Computer games/simulations	4%	9%	4%	10%	7%
English language instruction	3%	6%	9%	11%	7%
Don't know/unsure	11%	9%	9%	8%	10%
Other	5%	4%	4%	4%	4%

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Figure 15: Change in Demand for Library Print and Electronic Offerings and Services Over the Past Year

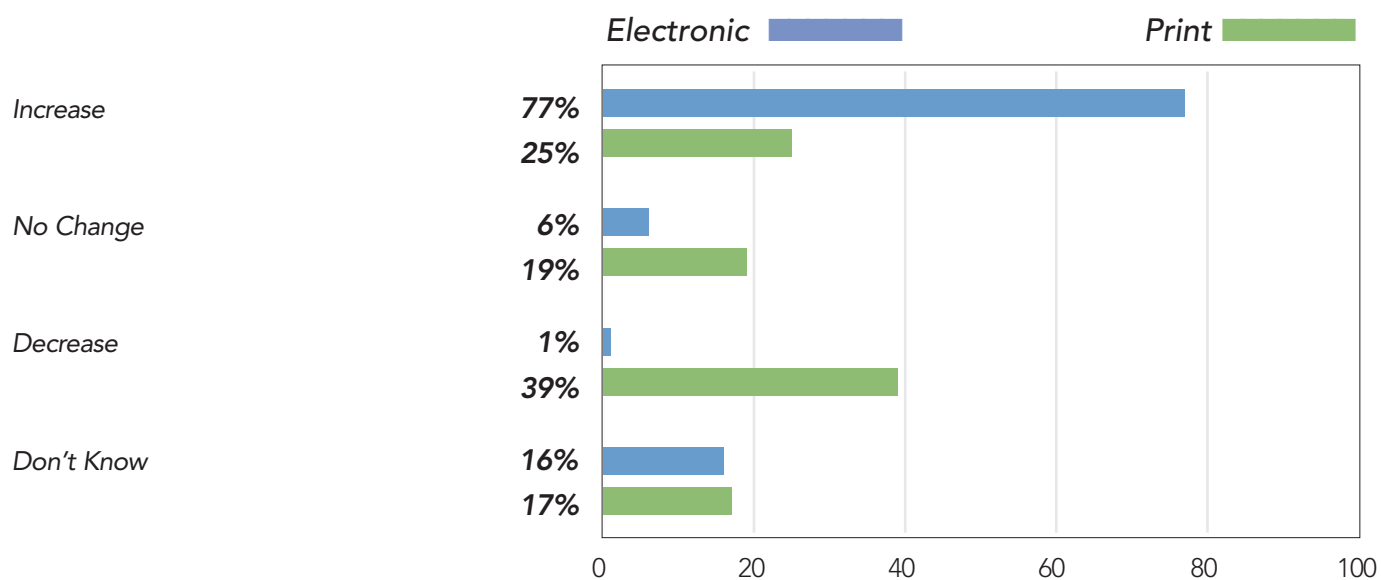


Figure 16: Content Acquisitions Portion of Respondents' Budgets

	<2,500	2,500–5K	5–10K	10K+	AVG.
Online databases, digital content collections	32%	35%	40%	35%	35%
Printed books and other printed materials	28%	22%	23%	21%	25%
Serials/Periodicals (print)	25%	22%	18%	29%	23%
Media titles (video, audio, computer-based modules, games, etc.)	5%	5%	6%	5%	5%
Ebooks	4%	4%	5%	5%	4%
Other (microforms, manuscripts, archives, preservation, etc.)	2%	4%	2%	1%	2%
Special programs	1%	1%	1%	1%	1%
All other categories	3%	6%	4%	3%	4%

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TECHNOLOGY EQUIPMENT AND SERVICES

Academic libraries maintained their information technology system budgets through the budget storm, and are growing their online subscription purchasing. One-third of academic libraries are also subscribing to, or considering the use of, public cloud computing resources, particularly online communication and collaboration tools. Social media tools are also now part of most academic 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-fourth say spending increased, while 10% say it decreased. The declines in library tech spending were most pronounced among the largest libraries in the survey—21% of those on campuses of 10,000 students or more made cuts in technology spending, or nearly three times the level of their smaller counterparts. (See Figure 17.)

There will be a slight bump in library tech spending at colleges and universities over the coming year, with 31% planning more purchases. Growth in IT spending will be most pronounced among the smallest educational facilities in the survey—34% of libraries serving fewer than 2,500 students will be increasing spending, up from 25% in the prior year. Still, the largest libraries in the survey are more likely to continue cutting back, with 16% planning cuts. (See Figure 18.)

Many academic libraries were faced with hard choices as to how to pare down their annual budgets, but online subscriptions were considered essential to campus libraries, the survey finds. Over the past year, three-fifths of respondents increased spending in this area, compared to barely a handful cutting back. Increasing online subscriptions was considered a priority among all sizes of academic libraries. (See Figure 19.)

The blistering pace of increases in online subscriptions will ease somewhat over the coming year, but close to half of the academic libraries surveyed—particularly smaller ones—are still accelerating their adoption. Forty-seven percent of respondents overall plan to increase their online subscriptions, with only 6% planning any cutbacks. While larger academic institutions are

more cautious—34% plan to increase subscriptions—a majority of the smaller libraries will be doing so. (See Figure 20.)

A sizable segment of academic libraries are embracing cloud computing, the survey finds. Close to one-third either already use public cloud resources, or are planning to do so. Current adoption is highest (16%) among mid-size libraries in the 2,500–5,000 student range, while those in the 5,000–10,000 range are doing the most planning. (See Figure 21.)

Current or planned uses of cloud computing in academic library settings mainly include communications capabilities, such as web conferencing, video, podcasting, email, and collaboration. Interestingly, mid-size libraries are the most likely to be adopting infrastructure-type services (online storage or processing) from the cloud. However, for the most part, respondents are uncertain as to what kinds of cloud services they will be using. A majority, in fact, say they do not know what role the cloud will play. (See Figure 22.)

In terms of existing technology products or services, online library catalog/OPACs are a standard for almost all academic libraries, present at 94% of sites. More than eight-tenths also maintain a LAN, WAN, or wireless network for online access, and the same portion also have an ILS. (See Figure 23.)

Along with existing investments, library managers were asked to identify areas in which they intended to make new purchases or upgrades. Computer hardware is highest on the list of planned purchases over the coming year. More than one-fifth plan to purchase or upgrade their PCs or other computers during 2011. Another 20% will be upgrading their online catalogs and integrated library systems. Plans are strongest among the largest libraries in the survey. (See Figure 24.)

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 academic libraries' plans. Close to three-fifths, in fact, are either encouraging or planning to encourage the use of social networking tools such as Facebook and LinkedIn. Close to half are sharing library web pages and subject guides, such as LibGuides. Another 41% are promoting the use of wikis or blogs. (See Figure 25.)

Figure 17: Change in Academic Library Spending on Information Technology Hardware, Software, and Related IT Services Between 2009–2010 (not including online subscriptions)

	<2,500	2,500–5K	5–10K	10K+	AVG.
<i>Increased</i>	25%	28%	28%	32%	28%
<i>Stayed the same</i>	43%	28%	42%	18%	33%
<i>Decreased</i>	8%	7%	7%	21%	10%
<i>Don't know/unsure</i>	23%	37%	23%	29%	29%

Figure 18: Change in Academic Library Spending on Information Technology Hardware, Software, and Related IT Services Over Coming Year (2010–2011) (not including online subscriptions)

	<2,500	2,500–5K	5–10K	10K+	AVG.
<i>Increased</i>	34%	25%	28%	33%	31%
<i>Stayed the same</i>	40%	29%	30%	16%	30%
<i>Decreased</i>	6%	8%	12%	16%	10%
<i>Don't know/unsure</i>	20%	37%	30%	36%	30%

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Figure 19: Change in Academic Library Spending on Online Subscriptions Between 2009–2010

	<2,500	2,500–5K	5–10K	10K+	AVG.
<i>Increased</i>	60%	59%	67%	54%	59%
<i>Stayed the same</i>	25%	12%	12%	12%	17%
<i>Decreased</i>	6%	6%	10%	11%	7%
<i>Don't know/unsure</i>	9%	22%	12%	23%	17%

Figure 20: Change in Academic Library Spending on Online Subscriptions Over Coming Year (2010–2011)

	<2,500	2,500–5K	5–10K	10K+	AVG.
<i>Increased</i>	53%	56%	42%	34%	47%
<i>Stayed the same</i>	28%	17%	37%	25%	26%
<i>Decreased</i>	5%	2%	4%	15%	6%
<i>Don't know/unsure</i>	14%	25%	16%	27%	21%

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Figure 21: Percentage of Academic Libraries Adopting Cloud Computing

	<2,500	2,500–5K	5–10K	10K+	AVG.
Currently use cloud resources	11%	16%	12%	9%	12%
Planning or considering cloud resources	14%	16%	31%	29%	20%
No	41%	31%	21%	35%	34%
Don't know/unsure	33%	37%	36%	27%	34%

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

Figure 22: Cloud Computing Services

	<2,500	2,500–5K	5–10K	10K+	AVG.
Communications (web conferencing, video, podcasting, email, collaboration)	33%	37%	36%	27%	34%
IT infrastructure (online storage, processing)	18%	20%	45%	18%	23%
Specialized business applications (business, management, marketing, market research)	7%	0%	3%	6%	4%
Don't know/not sure	61%	61%	42%	47%	55%
Other	5%	2%	6%	5%	4%

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Figure 23: Information Technology Products/Services in Use

	<2,500	2,500–5K	5–10K	10K+	AVG.
Online library catalog/OPAC	93%	97%	95%	94%	94%
LAN/WAN/wireless network	74%	89%	79%	88%	81%
Integrated Library System (ILS)	75%	84%	86%	87%	81%
PCs/kiosks/laptops/mobile devices	58%	68%	79%	69%	66%
Intranet/extranet/website	67%	68%	55%	69%	66%
Web-based (IM or email) reference service	57%	69%	76%	87%	69%
RFID check-in/check-out, inventory control	13%	10%	5%	21%	12%
Ebook readers	15%	19%	10%	17%	15%
Audio/video teleconferencing	17%	19%	24%	25%	20%
Authentication solutions	39%	60%	55%	63%	51%
Electronic Resource Management Systems	25%	47%	31%	52%	37%
Link resolvers	9%	64%	67%	73%	57%
Discovery services	11%	23%	29%	33%	21%
Other	2%	3%	2%	1%	2%

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Figure 24: Information Technology Products/Services Planned for Upgrade in Fiscal 2011

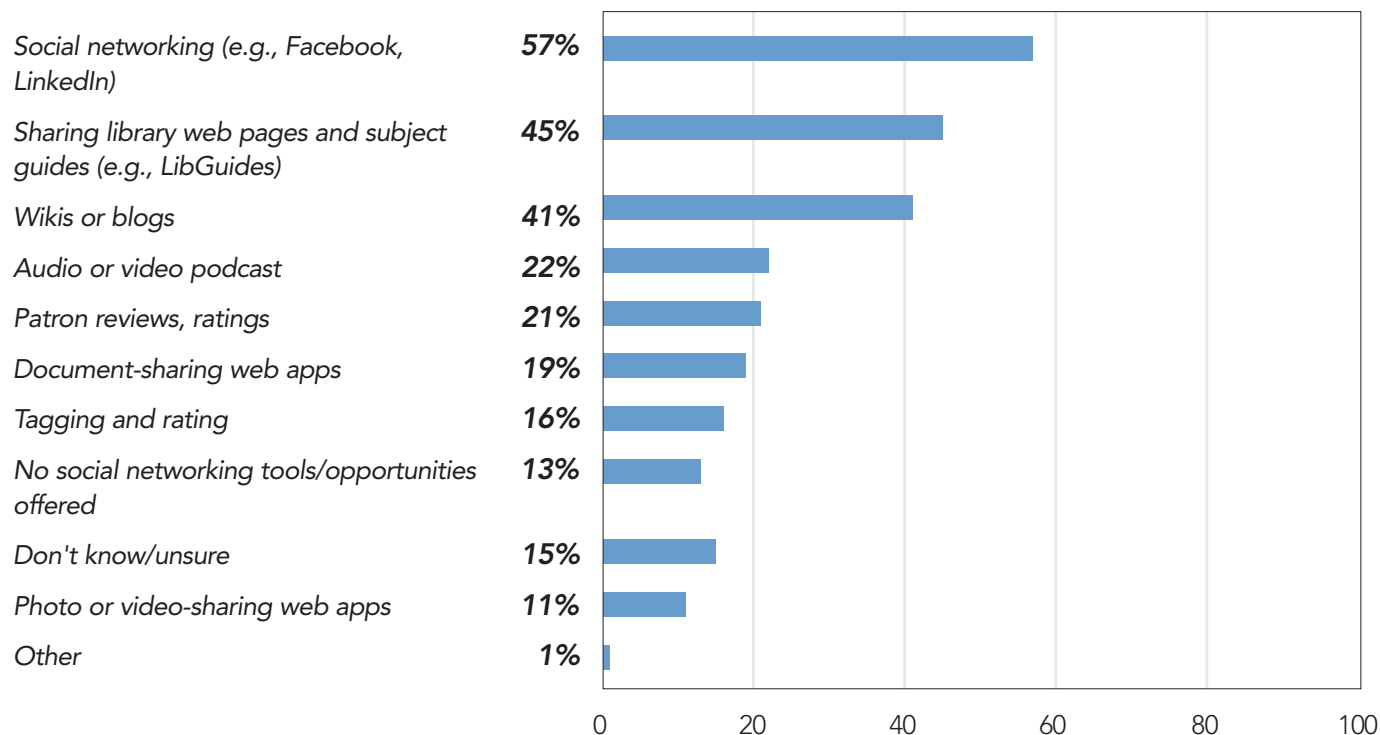
	<2,500	2,500–5K	5–10K	10K+	AVG.
PCs/kiosks/laptops/mobile devices	16%	26%	17%	33%	22%
Integrated Library System (ILS)	28%	11%	11%	25%	20%
Online library catalog/OPAC	28%	9%	11%	19%	18%
Ebook Readers	7%	30%	23%	6%	16%
LAN/WAN/wireless network	13%	9%	6%	6%	9%
Intranet/extranet/website	9%	11%	6%	3%	8%
RFID check-in/check-out, inventory control	6%	2%	9%	3%	5%
Audio/video teleconferencing	3%	4%	6%	11%	5%
Web-based (IM or email) reference service	10%	4%	17%	3%	9%
Authentication solutions	7%	6%	0%	3%	5%
Electronic Resource Management Systems	9%	11%	6%	17%	10%
Discovery services	16%	30%	14%	17%	19%
Link resolvers	7%	13%	6%	8%	9%
Other	16%	10%	17%	33%	18%

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Figure 25: Web 2.0 Services Being Adopted Among Academic Libraries



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FUTURE PRIORITIES

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

Academic 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 tops the list as the leading endeavor, cited by close to two-thirds of respondents. A similar portion also see their leading mission over the months and years to come as that of providing the training necessary for their constituents to take advantage of these services. A majority are also focused on providing the means to better enable the discovery of library collections. Larger institutions tend to be more focused on providing richer experiences for the students and faculty members using their facilities. (See Figure 26.)

Colleges and universities may have many members of tech-savvy Generation Y, but there are also many students returning to freshen up or advance their skill levels. As one respondent, a librarian with a Northeastern college, puts it, the challenge for academic librarians is to “keep up with the fast-paced changes in technology, with more individuals returning to college that lack basic computer skills and therefore have a greater difficulty in doing research and using databases. We try to hold more ‘how do I’ classes to meet their needs, but both their and our time is limited for this to happen as the classes are voluntary. There is a need for these to be incorporated within the curriculum and made mandatory.”

Two items dominate the agendas of most academic library managers over the next 5 years: maintaining services with tight budgets (80%), and keeping up with changes in information technology (67%). (See Figure 27.) A sizable segment, 40%, are also focusing on identifying new sources of funding, and a similar number are concentrating on migrations from print to digital content.

One-fifth also acknowledge that they are competing with the wide availability of online services as information sources. Some librarians agree that libraries need to assume a more visible role as a provider of in-depth knowledge and resources that can't be found on the web. As one respondent put it, “Our greatest challenge is overcoming the adversity from the ‘Google’ generation simply retrieving all their information from the web, not from professional sources or databases.”

A majority of academic libraries, 63%, now either have formal strategic plans that establish a road map going forward into this new era or are currently developing one. Another 9% are considering such plans. Larger and mid-size libraries are more likely to have adopted strategic plans than their counterparts in smaller campuses. (See Figure 28.)

Strategic plans provide the vision going forward for many institutions. Consider this part of the mission statement from the Yale University library: “We meet the changing needs of the library and its users by developing innovative solutions, practices, and services in a creative work environment that supports flexibility, collaboration, and an openness to new ideas and practices, risk taking, and forward thinking”

Figure 26: Priorities for the Coming Year

	<2,500	2,500–5K	5–10K	10K+	AVG.
Increase availability of online publications/digital access	55%	70%	67%	64%	63%
Provide assistance and education on information access tools and services	63%	64%	52%	66%	61%
Enhance discovery of collections	47%	53%	48%	60%	51%
Improve/expand customer service	43%	47%	50%	57%	48%
Repurpose physical space	37%	47%	54%	53%	46%
Drive usage of current resources	48%	45%	39%	43%	45%
Identify and reach out to new groups of patrons	12%	25%	22%	24%	20%
Develop unique library collections	16%	17%	22%	33%	21%
Physical expansion/upgrade of facilities	10%	20%	28%	26%	19%
Join or increase participation in consortium/network	19%	16%	15%	19%	17%
Institute special programs for constituents/patrons	13%	19%	17%	21%	17%
Enhance user workflow tools	9%	14%	24%	22%	16%
Don't know/unsure	3%	2%	4%	0%	3%
Other	5%	4%	4%	5%	4%

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Figure 27: Greatest Challenges Over the Next 5 Years

	<2,500	2,500–5K	5–10K	10K+	AVG.
Maintaining services with tight budgets	77%	78%	76%	88%	80%
Keeping up with changes in information technology	73%	67%	65%	59%	67%
Identifying new sources of funding	33%	36%	46%	53%	40%
Migrating print content to digital formats	37%	44%	41%	38%	40%
Finding and retaining knowledgeable staff	23%	28%	39%	41%	32%
Keeping facilities open or at preferred operational levels	20%	30%	41%	41%	31%
Competing/keeping up with public online services or offerings	23%	16%	20%	24%	21%
Other	8%	0%	8%	12%	7%

Figure 28: Library Strategic Plans

	<2,500	2,500–5K	5–10K	10K+	AVG.
Yes	30%	39%	37%	45%	36%
Under development	24%	31%	24%	31%	27%
Under consideration	11%	8%	11%	7%	9%
No	29%	14%	22%	7%	19%
Don't know/unsure	6%	8%	7%	10%	8%

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

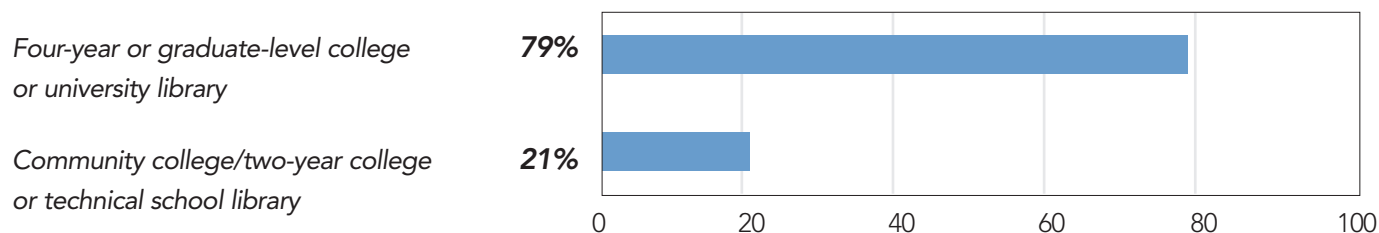
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DEMOGRAPHICS

Figure 29: Types of Academic Institutions Surveyed

Figure 30: Types of Academic Institutions Surveyed—
By Population Served

	<2,500	2,500–5K	5–10K	10K+	AVG.
Academic—four-year or graduate-level college or university library	81%	80%	77%	77%	79%
Community college/two-year college or technical school library	19%	20%	23%	23%	21%

Figure 31: Respondents' Roles in Managing Library Budgets

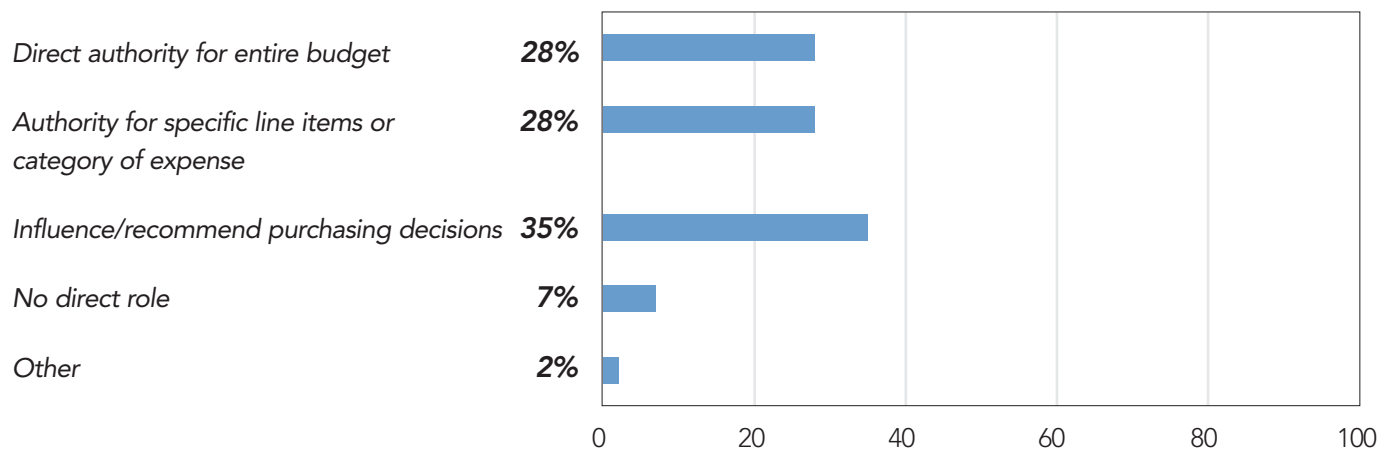


Figure 32: Total Population of Community Served

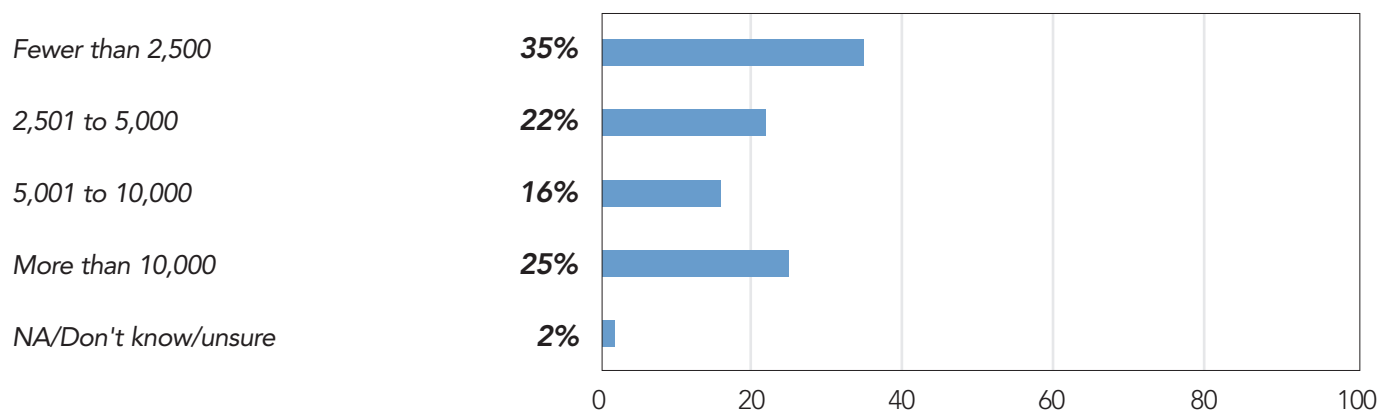


Figure 33: Respondents' Titles

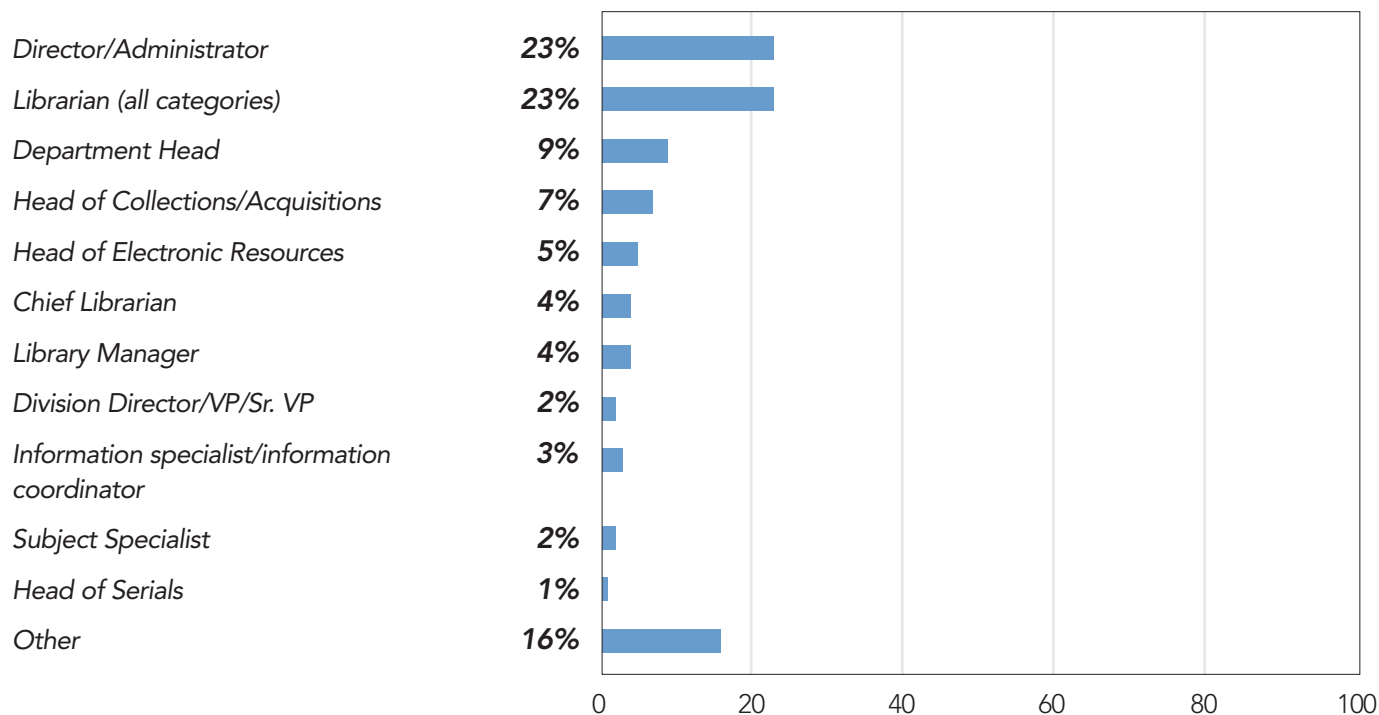
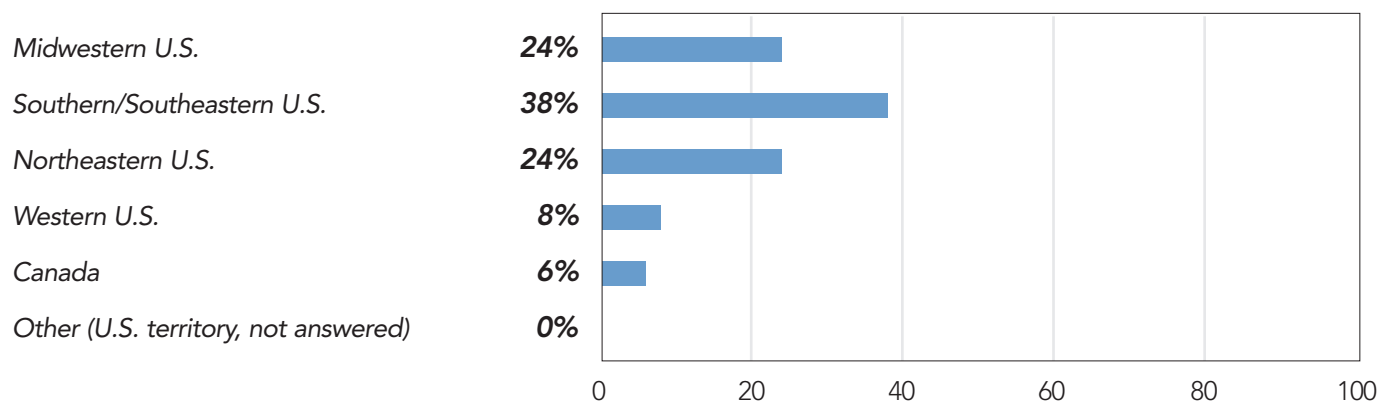


Figure 34: Respondents by Region



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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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