Library Resource Guide

# SPECIAL/CORPORATE/ FOUNDATION/PROFESSIONAL/ GOVERNMENT AGENCIES LIBRARIES EDITION

# THE DIGITAL SQUEEZE: LIBRARIES AT THE CROSSROADS

## THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2012 LIBRARY SPENDING PLANS

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*SPECIAL/CORPORATE/FOUNDATION/PROFESSIONAL/GOVERNMENT AGENCY LIBRARIES EDITION The Digital Squeeze: Libraries at the Crossroads—The Library Resource Guide Benchmark Study on 2012 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. To review abstracts of our past reports, visit www.dbta.com/DBTA_Downloads/ResearchReports. Unisphere Media, 630 Central Avenue, Murray Hill, New Providence, NJ 07974; 908-795-3701, Email: twilson@infotoday.com, Web: www.dbta.com.

Data collection and analysis performed with SurveyMethods.

## HIGHLIGHTS

Over the past year, the budget ax has hit many of North America's special, corporate, foundation, professional and government agency libraries hard. While many of these libraries are seeing funding stabilize, they are still challenged with providing their constituents with information in a range of formats, from print to ebook to online. Many libraries are just starting to contemplate the shift from print to digital. At special, corporate, foundation, professional, and government libraries, print still consumes a larger share of annual budgets, but an increasing portion is going to digital materials. At government agency libraries, print is still the predominant mode of information delivery.

These are the findings of a new study, conducted by the Library Resource Guide (LRG)—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, conducted in December 2011 among libraries listed in ITI's American Library Directory, reveals current spending patterns for special, corporate, foundation and professional libraries—defined as facilities serving law firms, medical facilities, museums, companies, and associations—and provides projections for budgets and spending trends for 2012. As part of this report, we also report on government agency libraries—which include entities that are part of federal, state, or provincial agencies, departments, or service units. In total, 106 special, corporate, foundation and professional libraries and 34 government agency library managers or librarians responded to this year's survey.

In separate reports in the LRG series, budget and digital migration trends are explored within public community and academic libraries.

Among the participants in the survey are directors, administrators, managers, department heads, and librarians from the complete range of library settings. The largest segment within the special, corporate, foundation, and professional sector, 26%, are directors and administrators, and 26% are librarians across various categories. (For detailed demographic breakdowns, see Figures 58–61 at the end of this report.)

- About a third of the respondents from government agency libraries are directors and administrators, and 23% are librarians.
- Libraries covered in the survey represent a range of structures, sizes, and segments. Most of the special, corporate, foundation, professional libraries, 72%, serve populations of fewer than 10,000 constituents.
- A majority of the government agency libraries, 53%, also fall into this size category.
- More than half of the special, corporate, foundation, professional libraries, 51%, are single, independent or standalone libraries, while another 19% represent library systems.
- Forty-two percent of the government agency libraries are standalone, and 23% are a multi-location system.
- Geographically, among the special, corporate, foundation, and professional libraries, the largest segment, 28%, came from the South/Southeast United States (including Puerto Rico), and 23% are based in Northeastern states. Another 18% are in Canadian provinces, primarily Ontario.
- The largest segment of government agency libraries, 27%, are based in the Southern United States.

**Key findings from the survey include the following:**

- Overall, funding for special, corporate, foundation, and professional libraries has improved modestly over the past year, but respondents see tight or stagnant budgets as the new normal. Much of this funding is helping to maintain staffing levels, but there is an increasing amount of resources going to digitization. While print still consumes a larger share of special, corporate, foundation, and professional libraries libraries' budgets, an increasing share is going to digital materials. Government agency libraries are seeing accelerating declines in funding, but are slow to make the change from print to digital.

- Among special, corporate, foundation, and professional libraries, the shift to the digital library has accelerated noticeably since the last survey just a year ago. Close to three-fourths of respondents report that demand for their libraries' electronic offerings has increased over the past year, and more libraries are seeing demand for technology-based services and ebooks. Accordingly, plans for IT spending are up. Cloud computing is still nascent at most special, corporate, foundation, and professional libraries, but interest is growing. Many government agency libraries still work with print-based materials, and are struggling with lean IT budget plans. For the most part, government agency libraries are not contemplating cloud at this time.

- Improvement of customer service and outreach to constituencies dominates the agendas of most special, corporate, foundation, and professional libraries this year. Budgets remain tight, and many institutions are exploring new sources of funding. Larger special, corporate, foundation and professional libraries—as well as government facilities—have strategic plans that map out short-term and long-term missions for their institutions. Government agency libraries are focusing on providing greater support for digital services and offerings.

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## STATE OF LIBRARY FINANCES: MIXED PROSPECTS FOR THE YEAR AHEAD

**Overall, funding for special, corporate, foundation, and professional libraries has improved modestly over the past year, but respondents see tight or stagnant budgets as the new normal Much of this funding is helping to maintain staffing levels, but there is an increasing amount of resources going to digitization. While print still consumes a larger share of special, corporate, foundation, and professional libraries libraries' budgets, an increasing portion is going to digital materials. Government agency libraries are seeing accelerating declines in funding, but are slow to make the change from print to digital.**

Survey respondents were asked about their specific roles in planning or managing their libraries' budgets, and those with budgetary authority were asked to provide annual spending figures and projections. In total, 78% of respondents in the special, corporate, foundation, and professional sectors had a significant level of budget authority, and another 19% influenced or made recommendations over library expenditures. (See Figure 1.) Within government agency libraries, 73% reported having budget authority. (See Figure 2.)

Overall, the available funding for special, corporate, foundation, and professional libraries has improved somewhat over the past year, though, as we'll show later in this report, many areas are still under threat of the budget knife. When asked for general budget ranges, a total of 22% report having annual budgets exceeding $1 million, up from 18% a year ago. At the high end, the percentage reporting annual budgets exceeding $5 million rose from 3% to 6%, though this may reflect changes in the sample from year to year. While the majority of these libraries have budgets of $500,000 or less, this percentage declined from 70% last year to 58% in the current survey. (See Figure 3.)

Respondents also provided their exact total annual budgets for fiscal year 2012 and projections for 2013, including all aspects of operations and services—personnel, content acquisitions, collection development, operations, library systems, computers, A/V, media equipment, software, and services. In terms of reported annual budgets, the average across special, corporate, foundation or professional libraries of all sizes is about $1.4 million a year. (See Figure 4.) Among libraries serving small-to-medium-size constituency groups (fewer than 10,000 people) the average library budget is $897,000 a year. Among those serving larger populations (more than 10,000), the average is more than $3.5 million. Throughout this survey report, we will be exploring the differing trends and requirements seen among the two size groups with the special, corporate, foundation or professional libraries sector.

The average budget for a government agency library reported in this survey is $2,089,804. (See Figure 5.) Due to a limited sample size, size ranges are not available for the government sector.

The libraries in this year's sample may be enjoying larger budgets than a year ago, but, as shown throughout this survey report, these increases appear to be spotty, and are being quickly absorbed into year-to-year increases in operational and acquisition costs. There is also a great deal of uncertainty about future budgets. Looking at the percentage of respondents within special, corporate, foundation or professional libraries reporting budget changes, the percentage seeing rising budgets is tepid from year to year. The percentage of libraries increasing their budgets was down from 29% in last year's report to 22% for the most recent 12 months. A majority, 52%, say they experienced a decline in their budgets in the most recent year. For the year ahead, the largest slice of respondents predict things will hold steady at their current levels. (See Figure 6.)

Smaller libraries (serving constituencies of fewer than 10,000 people) are more likely to see boosts in their budgets—24% report increases for the most recent fiscal year, versus only 15% of larger libraries. Smaller library respondents expect a little less in the year ahead, but are more optimistic than their larger counterparts. (See Figure 7.)

Among government agency libraries, severe cost-cutting is taking its toll. While close to a third of government agency libraries saw increases in the 2009–2010 timeframe, only 17% report increases in the most recent budget year that closed at the end of fiscal 2011. For the year ahead, only 11% anticipate increases. Close to half, 44%, expect more cuts, a percentage that is consistent with last year's survey. (See Figure 8.)

Much of the funding streaming into special, corporate, foundation, and professional libraries is helping to maintain staffing levels. In terms of where funding is being directed, respondents report that personnel and staffing now consume 42 cents for every dollar of their annual budgets, up from 37 cents a year ago. Funding for content acquisition, collection development, and equipment purchases has remained constant, at about 39 cents, as has the proportion of budgets going to library equipment and systems (10 cents on the dollar). Another six cents of every budget dollar is dedicated to operations and facilities. (See Figure 9.)

By library size, larger special, corporate, foundation, and professional facilities (serving constituencies of 10,000 or more) are spending a larger portion of their budgets on human resources and staffing, and less on content and collections. About half of every budget dollar in larger libraries (48 cents) goes to staffing, versus 41 cents for smaller libraries. Larger libraries also spend more on computers and equipment, as well as operations. (See Figure 10.)

As shown throughout this survey report, the pace of library digitization has been accelerating over the past year since the previous LRG survey was conducted. While print still consumes a larger share of special, corporate, foundation, and professional libraries libraries' budgets, an increasing share is going to digital materials. Fifty cents of every budget dollar goes to either print-based serials and periodicals, or printed books and materials. This is down from 53 cents a year ago. By contrast, the proportion of budgets going to either online databases and digital content collections, as well as ebooks is rising—from 36 cents to 39 cents on every budget dollar. As the survey will show, there is enormous interest and preparation for ebooks. However, ebooks actually take up very little of special, corporate, foundation, and professional library budgets so far—only 3% of budgets. (See Figure 11.)

Smaller special, corporate, foundation or professional libraries report spending a greater share of their budgets on online databases and digital content than their larger counterparts, the survey finds. Spending across other categories of content are fairly equal based on library size. (See Figure 12.)

Among government agency libraries, spending is almost evenly divided between staffing and content—39 cents on every dollar goes to human resources, while 35 cents goes to content acquisitions. (See Figure 13.) Within the content acquisition portion of the budget, 67 cents of every dollar still goes to print resources. (See Figure 14.)

Compared to year, it appears that there has been less fallout this year as a result of tight budgets or economic retrenching within special, corporate, foundation or professional libraries. Overall, 84% of respondents report taking some type of action taken to address budget shortfalls over the past year. While print subscriptions took the biggest hit, fewer libraries had to cut back in these offerings—down from 49% a year ago to 46% in this survey. There were also fewer cuts in travel and training, down from 42% a year ago to 32% in this year's survey. Salary freezes and staff cuts remained about the same, however—19% report cutting hours or staff, and 30% putting a hold on raises for staff. (See Figure 15.)

By size segments, larger special, corporate, foundation, and professional libraries continue to cut back and travel and training spending (58% versus 24% for smaller libraries), while close to half of the smaller institutions cut back on print subscriptions to trim their budgets. (See Figure 16.)

There is considerable cost-cutting across a range of functional areas among government agency libraries, the survey finds. A majority of libraries in this segment have cut spending on print subscriptions, frozen salaries, and cut or eliminated their conference, travel, and education budgets. (See Figure 17.)

While cutbacks are still the rule at most libraries, the survey still finds bright spots in spending on various services or offerings within special, corporate, foundation or professional libraries. A majority of respondents, 67%, report having areas with increased spending—up from 56% in last year's survey. The function seeing the most support is online subscriptions, cited by close to a third—and up six percentage points over last year. One-fifth of respondents also report they have increased spending on personnel and staffing, more than three times the level seen in the last survey. Spending on ebooks has also jumped, from 11% to 17%. (See Figure 18.)

Larger special, corporate, foundation, and professional libraries (serving constituencies of 10,000 or more people) were more likely than their smaller counterparts to have bumped up spending in some areas—particularly for personnel costs, ebooks, digital content, and library equipment. (See Figure 19.)

Among government agency libraries, the areas seeing the most spending increases focused on increasing digital capabilities. More than one-fourth reporting spending growth in online subscription acquisitions, while one-fifth ramped up spending on library technology. However, for the most part, few areas saw increased funding in the current year, reflecting the tight or declining budgets with which government agencies are contending. (See Figure 20.)

Overall, the past year has been a mixed picture for special, corporate, foundation, and professional libraries in terms of funding sources. In many cases, revenue streams from traditional funding sources have decreased. For example, fewer libraries report funding from corporate sponsors, the primary source for many—declining from 50% a year ago to 37% in this year's survey. More of these institutions report getting help from their state governments, however—from 19% to 30%. Gifts and donation and grants are down, but endowments are up. There has also been a rise in fee-based services—close to one-tenth of respondents now offer services for a charge as a way to underwrite their offerings to patrons. (See Figure 21.) For government agency libraries in this survey, a majority rely on federal government dollars. (See Figure 22.)

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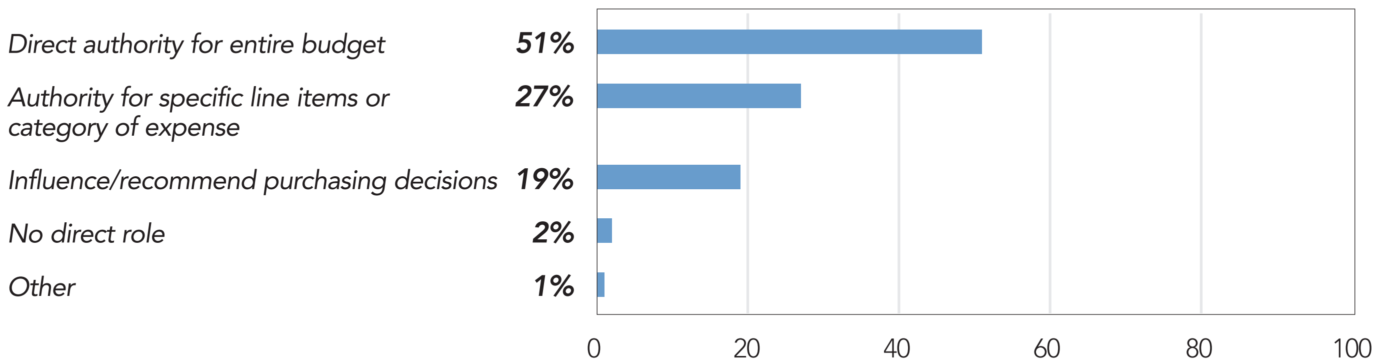
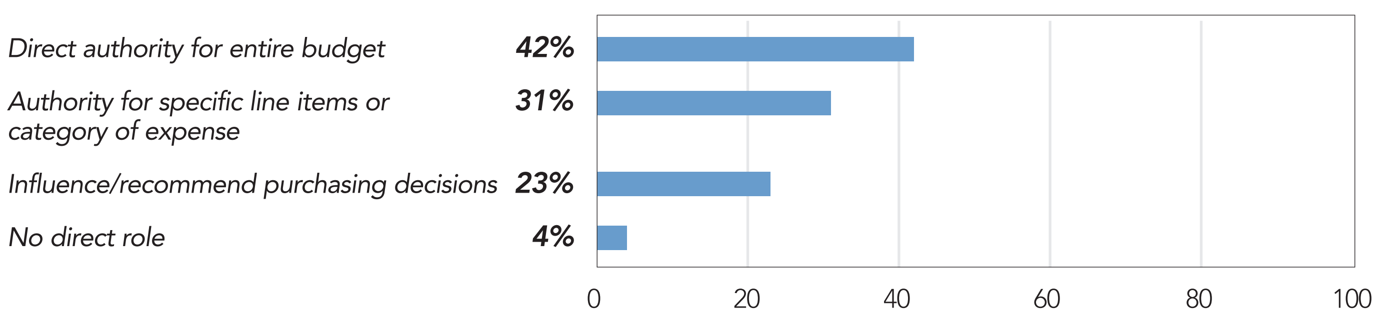
Data collection and analysis performed with SurveyMethods.

## Figure 1: Respondents' Roles in Managing Special/Corporate/ Foundation/Professional Library Budgets




## Figure 2: Respondents' Roles in Managing Government Agency Library Budgets

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## Figure 3: Annual Special/Corporate/Foundation/Professional Library Budget Ranges

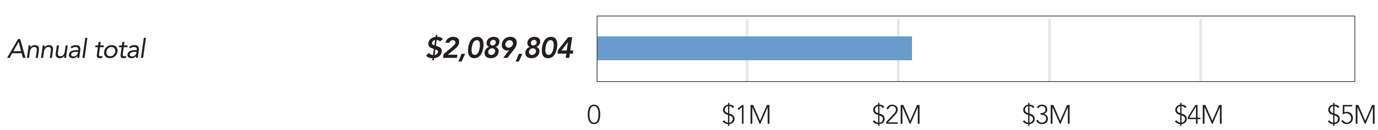
*(Includes all costs, including operations, acquisitions, and staffing)*

| | 2011 | 2012 |
|---|---|---|
| *Less than $100,000* | — | ***21%*** |
| *$100,000 to $500,000* | ***70%**** | ***37%*** |
| *$500,000 to $1,000,000* | ***11%*** | ***17%*** |
| *$1 million to $3 million* | ***10%*** | ***12%*** |
| *$3 million to $5 million* | ***5%*** | ***4%*** |
| *More than $5 million* | ***3%*** | ***6%*** |
| *Don't know/unsure* | ***2%*** | ***1%*** |

**Reported category was "less than $500,000" in 2011 survey. (Totals may not equal 100% due to rounding.)*

## Figure 4: Special/Corporate/Foundation/Professional Library Budgets —Overall Average, and Average by Population Served


## Figure 5: Government Agency Library Budgets

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## Figure 6: Changes in Special/Corporate/Foundation/Professional Library Budgets

| | 2009–2010 | 2010–2011 | 2011–2012 (PROJECTED) |
|---|---|---|---|
| *Increase* | ***29%*** | ***22%*** | ***27%*** |
| *No change* | ***31%*** | ***27%*** | ***31%*** |
| *Decrease* | ***34%*** | ***52%*** | ***28%*** |
| *Don't know/unsure* | ***6%*** | ***0%*** | ***14%*** |

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

## Figure 7: Increases in Special/Corporate/Foundation/Professional Library Budgets—By Population Size Served

| | <10,000 | >10,000 |
|---|---|---|
| *Increased 2010–2011* | ***24%*** | ***15%*** |
| *Increase 2011–2012 (projected)* | ***28%*** | ***23%*** |

## Figure 8: Changes in Government Agency Library Budgets

| | 2009–2010 | 2010–2011 | 2011–2012 (PROJECTED) |
|---|---|---|---|
| *Increase* | ***31%*** | ***17%*** | ***11%*** |
| *No change* | ***19%*** | ***28%*** | ***33%*** |
| *Decrease* | ***49%*** | ***44%*** | ***44%*** |
| *Don't know/unsure* | ***0%*** | ***11%*** | ***11%*** |

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

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## Figure 9: Allocation of Overall Special/Corporate/Foundation/Professional Library Budgets

| | 2011 | 2012 |
|---|---|---|
| *Personnel/staffing* | ***37%*** | ***42%*** |
| *Content acquisitions/collection development* | ***40%*** | ***39%*** |
| *Library systems, computers, A/V, media equipment, software/svcs* | ***11%*** | ***0%*** |
| *Operations/facilities* | ***7%*** | ***6%*** |
| *Other* | ***5%*** | ***3%*** |

*(Responses may not total 100% due to rounding.)*

## Figure 10: Allocation of Overall Special/Corporate/Foundation/Professional Library Budgets—By Population Size Served

| | <10,000 | >10,000 |
|---|---|---|
| *Personnel/staffing* | ***41%*** | ***48%*** |
| *Content acquisitions/collection development* | ***44%*** | ***36%*** |
| *Library systems, computers, A/V, media equipment, software/svcs* | ***9%*** | ***14%*** |
| *Operations/facilities* | ***4%*** | ***12%*** |
| *Other* | ***3%*** | ***4%*** |

*(Responses may not total 100% due to rounding.)*

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## Figure 11: Allocation of Special/Corporate/Foundation/Professional Library Content Acquisitions Budgets

| | 2011 | 2012 |
|---|---|---|
| *Online databases, digital content collections* | *33%* | *36%* |
| *Serials/periodicals (print)* | *30%* | *30%* |
| *Printed books & other printed materials* | *23%* | *20%* |
| *Media titles (video, audio, computer-based modules, etc.)* | *1%* | *3%* |
| *Ebooks* | *3%* | *3%* |
| *Other (microforms, manuscripts, archives, preservation, etc.)* | *4%* | *4%* |
| *All other categories* | *2%* | *5%* |

*(Responses may not total 100% due to rounding.)*

## Figure 12: Allocation of Special/Corporate/Foundation/Professional Library Content Acquisitions Budgets—By Population Size Served

| | <10,000 | >10,000 |
|---|---|---|
| *Online databases, digital content collections* | *38%* | *31%* |
| *Serials/Periodicals (print)* | *29%* | *30%* |
| *Printed books & other printed materials* | *19%* | *22%* |
| *Media titles (video, audio, computer-based modules, etc.)* | *3%* | *4%* |
| *Ebooks* | *3%* | *2%* |
| *Other (microforms, manuscripts, archives, preservation, etc.)* | *3%* | *10%* |
| *All other categories* | *4%* | *2%* |

*(Responses may not total 100% due to rounding.)*

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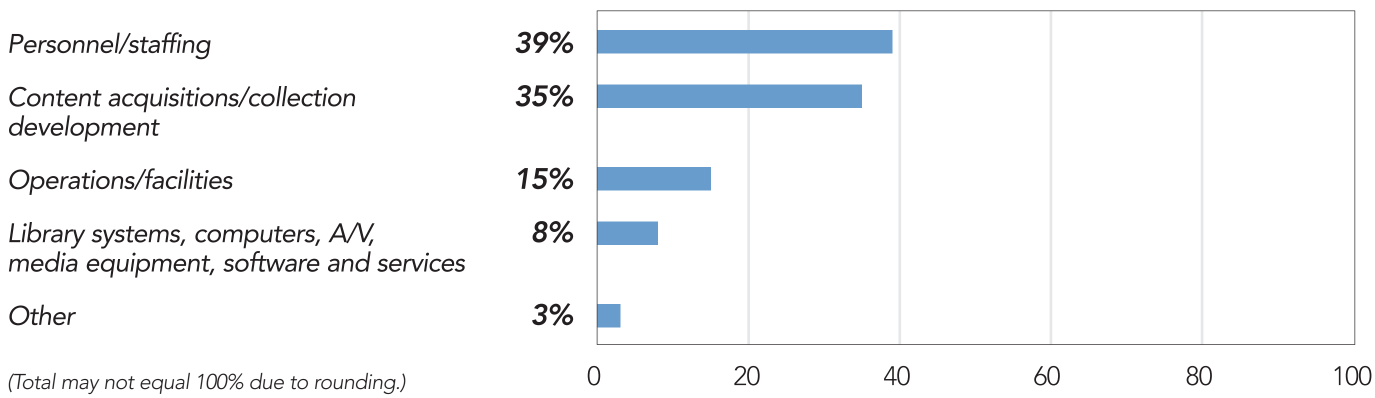
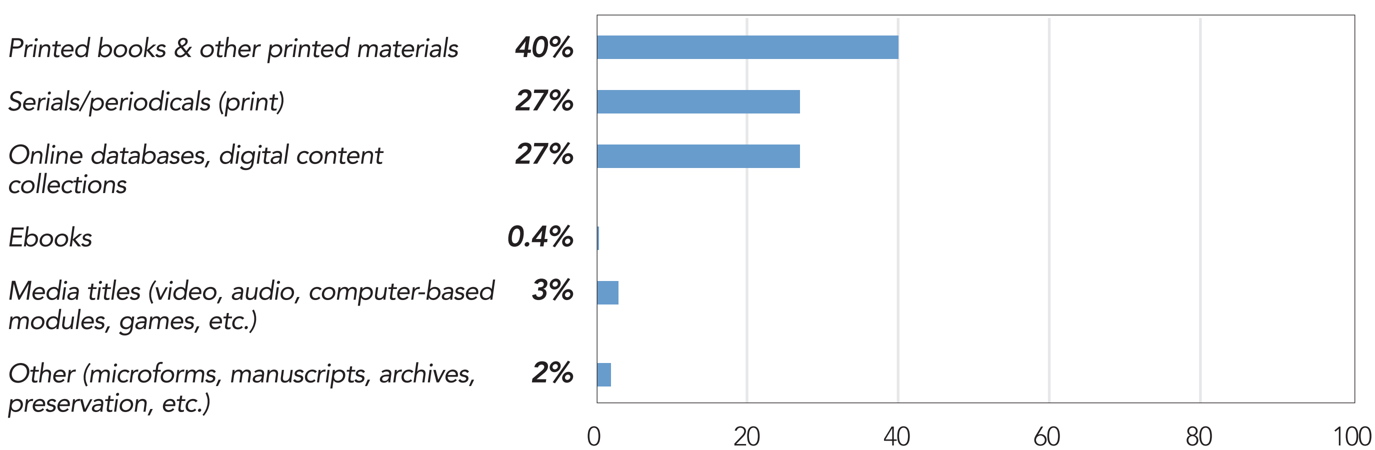
## Figure 13: Allocation of Overall Government Agency Library Budgets




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

## Figure 14: Allocation of Government Agency Library Content Acquisitions Budgets

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## Figure 15: Actions Taken by Special/Corporate/Foundation/Professional Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year

| | 2011 | 2012 |
|---|---|---|
| *Cut spending on print subscriptions* | ***49%*** | ***46%*** |
| *Cut spending on online subscriptions* | — | ***35%*** |
| *Cut or eliminated conference/travel/education budget* | ***42%*** | ***32%*** |
| *Salary freezes* | ***31%*** | ***30%*** |
| *Renegotiated contracts with vendors* | ***30%*** | ***29%*** |
| *Staff layoffs/staff hours cut* | ***18%*** | ***19%*** |
| *Collaborated/shared with other libraries/joined consortia* | ***15%*** | ***14%*** |
| *Moved more services/materials online* | ***26%*** | ***14%*** |
| *Reduced library hours* | ***8%*** | ***14%*** |
| *Added volunteers* | ***20%*** | ***11%*** |
| *Applied for more grants* | ***12%*** | ***10%*** |
| *Reduced programming* | ***8%*** | ***10%*** |
| *Consolidated departments* | ***9%*** | ***8%*** |
| *Lobbied for more funding from institutions* | ***7%*** | ***6%*** |
| *Reduced IT expenditures* | ***12%*** | ***6%*** |
| *Closed facilities* | ***1%*** | ***3%*** |
| *Don't know/unsure* | ***4%*** | ***0%*** |
| *Other* | ***7%*** | ***11%*** |
| *No cuts/budget freezes over past year* | ***22%*** | ***16%*** |

*(Multiple responses permitted.)*

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## Figure 16: Actions Taken by Special/Corporate/Foundation/Professional Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year—By Population Size Served

| | <10,000 | ≥≥>10,000 |
|---|---|---|
| *Cut spending on print subscriptions* | ***49%*** | ***33%*** |
| *Cut spending on online subscriptions* | ***35%*** | ***33%*** |
| *Cut or eliminated conference/travel/education budget* | ***24%*** | ***58%*** |
| *Salary freezes* | ***31%*** | ***25%*** |
| *Renegotiated contracts with vendors* | ***24%*** | ***25%*** |
| *Staff layoffs/staff hours cut* | ***20%*** | ***17%*** |
| *Collaborated/shared with other libraries/joined consortia* | ***12%*** | ***17%*** |
| *Moved more services/materials online* | ***12%*** | ***17%*** |
| *Reduced library hours* | ***14%*** | ***17%*** |
| *Added volunteers* | ***10%*** | ***17%*** |
| *Applied for more grants* | ***8%*** | ***17%*** |
| *Reduced programming* | ***10%*** | ***8%*** |
| *Consolidated departments* | ***8%*** | ***8%*** |
| *Lobbied for more funding from institutions* | ***8%*** | ***0%*** |
| *Reduced IT expenditures* | ***6%*** | ***8%*** |
| *Closed facilities* | ***2%*** | ***8%*** |
| *Don't know/unsure* | ***0%*** | ***0%*** |
| *Other* | ***12%*** | ***8%*** |
| *No cuts/budget freezes over past year* | ***16%*** | ***17%*** |

*(Multiple responses permitted.)*

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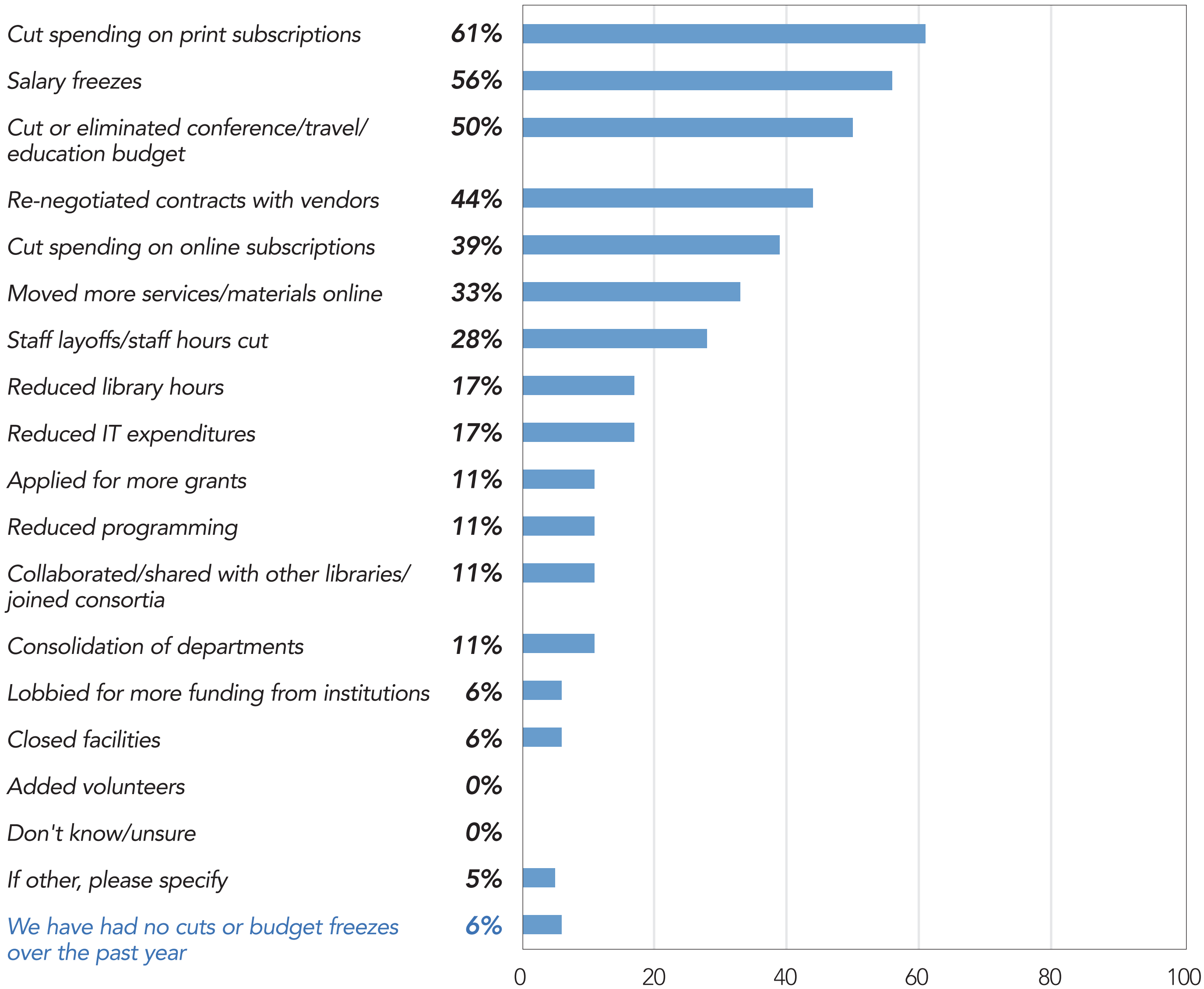
Data collection and analysis performed with SurveyMethods.

## Figure 17: Actions Taken by Government Agency Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year




(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

## Figure 18: Areas Seeing Increased Spending or Support in Special/Corporate/Foundation/Professional Libraries Over the Past Year

| | 2011 | 2012 |
|---|---|---|
| *Online subscription acquisitions* | ***26%*** | ***32%*** |
| *Personnel* | ***6%*** | ***20%*** |
| *Ebooks* | ***11%*** | ***17%*** |
| *Digital content collections/services* | ***12%*** | ***15%*** |
| *Library technology equipment, software* | ***8%*** | ***10%*** |
| *Book acquisitions* | ***6%*** | ***7%*** |
| *Periodicals/serials acquisitions* | ***5%*** | ***7%*** |
| *Facilities upgrades/maintenance* | ***3%*** | ***5%*** |
| *IT services* | ***4%*** | ***5%*** |
| *Cloud-based solutions* | ***1%*** | ***3%*** |
| *Multimedia/streaming media* | ***1%*** | ***2%*** |
| *Operations* | ***1%*** | ***2%*** |
| *Library hours/availability* | ***1%*** | ***2%*** |
| *Print subscription acquisitions* | — | ***3%*** |
| *Don't know/unsure* | ***8%*** | ***7%*** |
| *Other* | ***5%*** | ***5%*** |
| *No areas seeing increased spending/support* | ***44%*** | ***33%*** |

*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

# Figure 19: Areas Seeing Increased Spending or Support in Special/Corporate/Foundation/Professional Libraries Over the Past Year—By Population Size Served

| | <10,000 | >10,000 |
|---|---|---|
| *Online subscription acquisitions* | ***31%*** | ***30%*** |
| *Personnel* | ***17%*** | ***30%*** |
| *Ebooks* | ***15%*** | ***30%*** |
| *Digital content collections/services* | ***15%*** | ***20%*** |
| *Library technology equipment, software* | ***8%*** | ***20%*** |
| *Book acquisitions* | ***8%*** | ***0%*** |
| *Periodicals/serials acquisitions* | ***6%*** | ***10%*** |
| *Facilities upgrades/maintenance* | ***6%*** | ***0%*** |
| *IT services* | ***6%*** | ***0%*** |
| *Cloud-based solutions* | ***4%*** | ***0%*** |
| *Multimedia/streaming media* | ***2%*** | ***0%*** |
| *Operations* | ***2%*** | ***0%*** |
| *Library hours/availability* | ***2%*** | ***0%*** |
| *Print subscription acquisitions* | ***7%*** | ***0%*** |
| *Don't know/unsure* | ***6%*** | ***0%*** |
| *Other* | ***4%*** | ***30%*** |
| *No areas seeing increased spending/support* | ***35%*** | ***20%*** |

*(Multiple responses permitted.)*

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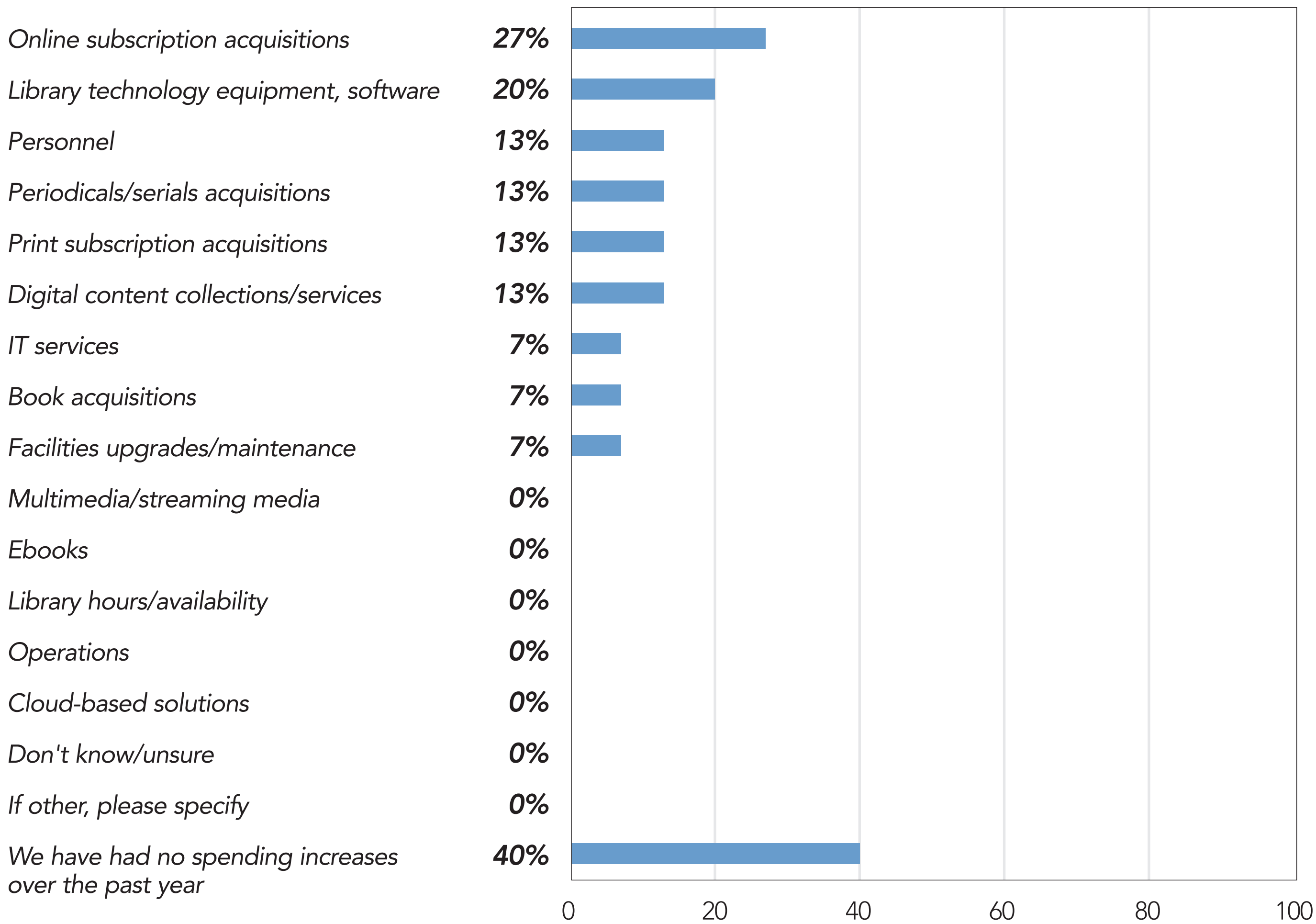
Data collection and analysis performed with SurveyMethods.

## Figure 20: Areas Seeing Increased Spending or Support in Government Agency Libraries Over the Past Year




*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

## Figure 21: Primary Sources of Special/Corporate/Foundation/ Professional Library Funding

| | 2011 | 2012 |
|---|---|---|
| *Corporate funding* | **50%** | **37%** |
| *Public funding-state* | **19%** | **30%** |
| *Gifts and donations* | **25%** | **19%** |
| *University/school tuition funding* | **5%** | **17%** |
| *Endowments* | **10%** | **12%** |
| *Fee-based services* | **6%** | **9%** |
| *Grants* | **5%** | **8%** |
| *Public funding-local* | **1%** | **8%** |
| *Public funding-federal* | **7%** | **6%** |
| *Special fundraising events* | **10%** | **5%** |
| *Don't know/unsure* | **2%** | **5%** |
| *Other* | **14%** | **17%** |

*(Multiple responses permitted.)*

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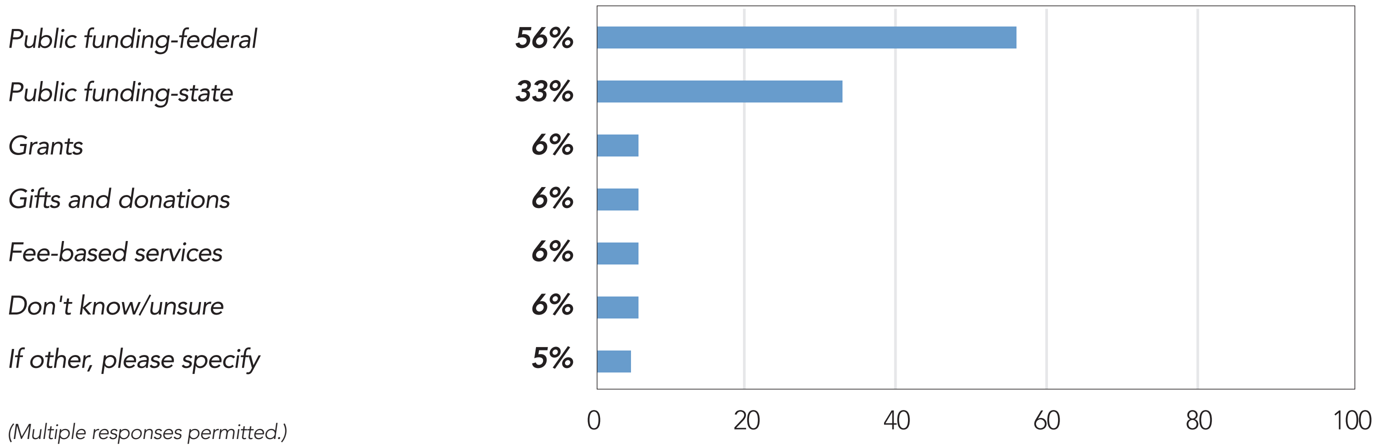
Data collection and analysis performed with SurveyMethods.

## Figure 22: Primary Sources of Government Agency Library Funding




*(Multiple responses permitted.)*

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## RISE OF THE DIGITAL PUBLIC LIBRARY

**Among special, corporate, foundation, and professional libraries, the shift to the digital library has accelerated noticeably since the last survey just a year ago. Close to three-fourths of respondents report that demand for their libraries' electronic offerings has increased over the past year, and more libraries are seeing demand for technology-based services and ebooks. Accordingly, plans for IT spending are up. Cloud computing is still nascent at most special, corporate, foundation, and professional libraries, but interest is growing. Many government agency libraries still work with print-based materials, and are struggling with lean IT budget plans. For the most part, government agency libraries are not contemplating cloud at this time.**

In tandem with increased demand for libraries' electronic offerings, demand for electronic resources at special, corporate, foundation, and professional libraries is rising, while demand for print resources is dropping. Close to three-fourths of respondents report increased demand on the digital side. In the meantime, 40% of special, corporate, foundation, or professional librarians and library managers say demand for print has declined, compared to 27% reporting any increases. In addition, the percentage reporting increases in print materials is down by eight percentage points from last year's survey. (See Figure 22.)

At government agency libraries, there is still solid demand for print materials along with digital. While more than two-thirds of respondents report increased demand for electronic formats, half also say constituents seek printed works as well. (See Figure 24.)

Demand for ebooks at special, corporate, foundation, and professional libraries is steadily increasing. More than a third of respondents, 34%, say they are seeing rising demand from patrons for ebook access, up from 29% a year ago. Demand for computer and web resources is strong, cited by close to half. Nearly a third say there are more requests for technical information and training materials from their facilities. There has also been a jump in demand for streaming media access. (See Figure 25.) Demand for most services cuts across the two size categories covered in the survey. Larger libraries (serving constituencies with more than 10,000 people) are more likely to have seen requests for assistance with job training and searches. (See Figure 26.)

Most government agency libraries have also seen increasing demand for computer and internet access, in addition to requests for technical information or training materials. About a third report more ebook requests as well. (See Figure 27.)

Spending on information technology hardware, software, and related IT services is expected to surge dramatically over the coming year. More than one-fourth of special, corporate, foundation and professional libraries, 26%, have increased spending over the past year (since fiscal 2010). This is up from 21% reporting such increases in the survey a year ago. This spending will be ramping up considerably in the year ahead, with 40% anticipating increased spending on IT solutions. Only a handful of respondents expect decreases in this area. (See Figure 28.) Larger facilities (with more than 10,000 constituents) projecting a huge surge in IT spending over the coming year, with more than two-thirds of this group expecting increases. (See Figure 29.)

Spending on online subscriptions at special, corporate, foundation, and professional libraries remains steady, with close to half, 48%, expecting to increase their spending in this area. This is consistent with last year's level, and will continue through the coming year. (See Figure 30.) Smaller facilities will lead the way with this spending. (See Figure 31.)

Among government agency libraries, the trend for IT and online subscription spending is not so bright. Twenty-four percent of libraries in this sector say that they boosted their IT spending in the most recent year, and intend to do so in the year ahead. However, this is down from 40% seen in last year's survey. (See Figure 32.) Spending on online subscriptions is also declining, from 57% reporting increases a year ago to 38% this year. Only 33% will be boosting such spending over the coming 12 months, while 29% are cutting back. (See Figure 33.)

Adoption of IT resources from public cloud computing providers is still in the early stages, but on the rise among special, corporate, foundation, and professional libraries, the survey finds. A number of cloud services are available that provide a range of capabilities—from IT-centric tasks such as hosting servers and providing storage to business applications such as maintaining patron files or financial packages. About 21% of libraries are either already using or planning to use cloud computing at their libraries, up from 9% last year. At this point, however, only 7% of special, corporate, foundation, and professional library managers report they currently have functioning cloud engagements in place, up from 3% a year ago. (See Figure 34.)

Larger special, corporate, foundation, and professional libraries in the survey are adopting cloud at a greater rate than their smaller counterparts. Close to a third of the larger set, 31%, report they are either using or planning to use cloud-based resources, compared to 14% of the smallest institutions in the survey. (See Figure 35.)

There has been somewhat of a shift toward cloud-based infrastructure services for handling computing functions such as storage and processing. Sixteen percent of special, corporate, foundation, and professional libraries now use or soon plan to use such services, up from 12% seen in last year's LRG survey. The most popular application for cloud among libraries in this segment is communication functions such as web conferencing, video, podcasting, email, and collaboration, now employed or about to be employed at 22% of sites. (See Figure 36.)

There is almost no momentum at all toward cloud services among government agency libraries. None of the respondents in the current survey use cloud services at this time, and only 10% plan to do so in the near future. (See Figure 37.) The functional area being eyed among those interested in adoption includes IT infrastructure support, such as storage or processing. (See Figure 38.) Interestingly, the U.S. federal government itself has been actively encouraging agencies to move to cloud services as part of its "Shared Service" and "Cloud First" directives to agencies. But these initiatives have not yet percolated down to the libraries run by these agencies.

Along with the digitization of libraries, there has been a rise in automation capabilities. When looking at the various information technology tools and platforms being adopted within special, corporate, foundation and professional libraries, there has been a significant rise in integrated library systems (ILSs), as well as networks and computer devices, reported. A majority, 54%, of special, corporate, foundation, and professional libraries now run with ILSs, up from 42% a year ago. An ILS, also referred to as a library management system, is an enterprise resource planning system for a library, used to track items owned, orders made, bills paid, and patrons who have borrowed. Many libraries use ILSs to order and acquire, receive and invoice, catalog, circulate, track, and shelve materials. (See Figure 39.)

Also in widespread use in special, corporate, foundation, and professional settings are online library catalogs, or OPACs, which provide a public interface for users from the back-end ILS—adopted by three-fourths of special, corporate, foundation, and professional libraries. Tools and platforms on the rise this year include web-based IM or email services (38% to 51%); PCs and devices (35% to 42%); link resolvers (23% to 29%); and electronic resource management systems (16% to 22%). However, only a handful, 7%, are stocking up on ebook readers—devices seeing huge demand in the public and academic sectors covered in the LRG reports.

Adoption of web capabilities and email has been more pronounced in smaller libraries, while larger libraries report more embracing of wireless networks, PCs and devices, and—by a wide margin—ebook readers (19% versus 4%). (See Figure 40.)

At government agency libraries, a large majority have adopted online library catalogs and integrated library systems (84% for each category). A majority also support websites and wireless networks. As with their counterparts in special and corporate libraries, only a handful of government libraries are offering ebook readers. (See Figure 41.)

Online library catalogs dominate the purchasing plans of special, corporate, foundation, and professional libraries going forward. Close to one-fourth of the libraries in the survey, 24%, plan to purchase online catalog systems this year, making this the top purchasing priority. This is about the same as the purchasing plans in last year's survey. Second on the list of purchasing plans is enhancing libraries' web capabilities, cited by 22%, up eight percentage points from a year ago. More special, corporate, foundation and professional libraries are also adopting link resolvers, with purchasing plans for these solutions jumping from 5% to 18%. Purchasing plans for discovery services are also on the rise, quadrupling from 4% to 16%. (See Figure 42.)

Building web capabilities and implementing new online catalogs are also highest on the list of government agency libraries. One-fourth of the libraries in this survey plan to make purchases in these areas over the coming year. (See Figure 43.)

Special, corporate, foundation, and professional libraries appear to be taking a greater interest in social media platforms or services, the survey finds. Overall, 70% of these libraries now use or offer social media resources. Close to a third, 31%, are making greater use of social network platforms such as Facebook, Twitter or LinkedIn, which enable greater online engagement and communication with constituents. Last year, 26% of these libraries were active with public social networking services. There has also been a marked increase in the use of LibGuides for collaboration, and to create and maintain subject guides, course guides, and research information, or even to create and maintain library websites. Adoption has risen from 20% a year ago to 30% today. (See Figure 44.)

Among government agency libraries, wikis or blogs are the most often-used social media platform, cited by close to a third of respondents. Another 21% employ LibGuides. Adoption of public social media services, such as Facebook, is weak or nonexistent in this sector, however. (See Figure 45.)

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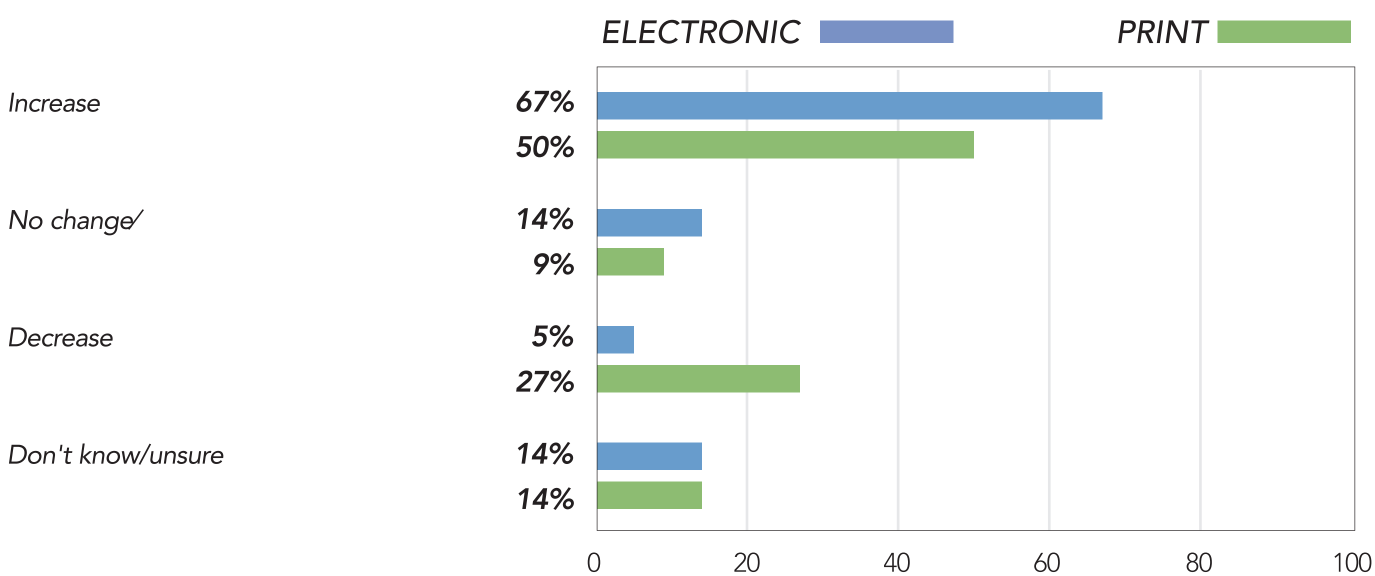
Data collection and analysis performed with SurveyMethods. 

## Figure 23: Change in Demand for Special/Corporate/ Foundation/Professional Library Print and Electronic Offerings Over the Past Year

| | ELECTRONIC | | PRINT | |
|---|---|---|---|---|
| | 2011 | 2012 | 2011 | 2012 |
| *Increase* | ***70%*** | ***72%*** | ***35%*** | ***27%*** |
| *No change* | ***18%*** | ***12%*** | ***23%*** | ***23%*** |
| *Decrease* | ***2%*** | ***5%*** | ***35%*** | ***40%*** |
| *Don't know/unsure* | ***7%*** | ***12%*** | ***7%*** | ***10%*** |

*(Responses may not total 100% due to rounding.)*

## Figure 24: Change in Demand for Government Agency Library Print and Electronic Offerings Over the Past Year

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Data collection and analysis performed with SurveyMethods.

## Figure 25: What Special/Corporate/Foundation/Professional Library Users Have Been Requesting Over the Past Year

| | 2011 | 2012 |
|---|---|---|
| *Computer/web access* | ***47%*** | ***49%*** |
| *Wireless access* | ***30%*** | ***37%*** |
| *Ebooks* | ***29%*** | ***34%*** |
| *Technical information/training* | ***27%*** | ***31%*** |
| *Medical* | ***28%*** | ***27%*** |
| *Primary and continuing education programs/requirements* | ***13%*** | ***15%*** |
| *Streaming media* | ***7%*** | ***13%*** |
| *Job search/career development information* | ***6%*** | ***7%*** |
| *Audiobooks* | ***10%*** | ***7%*** |
| *Computer games/simulations* | ***2%*** | ***0%*** |
| *English language instruction* | ***2%*** | ***1%*** |
| *Don't know/unsure* | ***11%*** | ***23%*** |
| *Other* | ***10%*** | ***9%*** |

*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

## Figure 26: What Special/Corporate/Foundation/Professional Library Patrons Have Been RequestingOver the Past Year —By Population Size Served

| | <10,000 | >10,000 |
|---|---|---|
| *Computer/web access* | 47% | 53% |
| *Wireless access* | 38% | 33% |
| *Ebooks* | 34% | 33% |
| *Technical information/training* | 30% | 33% |
| *Medical* | 25% | 33% |
| *Primary and continuing education programs/requirements* | 13% | 27% |
| *Streaming media* | 15% | 7% |
| *Job search/career development information* | 4% | 20% |
| *Audiobooks* | 6% | 13% |
| *Computer games/simulations* | 0% | 0% |
| *English language instruction* | 2% | 0% |
| *Don't know/unsure* | 23% | 20% |
| *Other* | 9% | 13% |

*(Multiple responses permitted.)*

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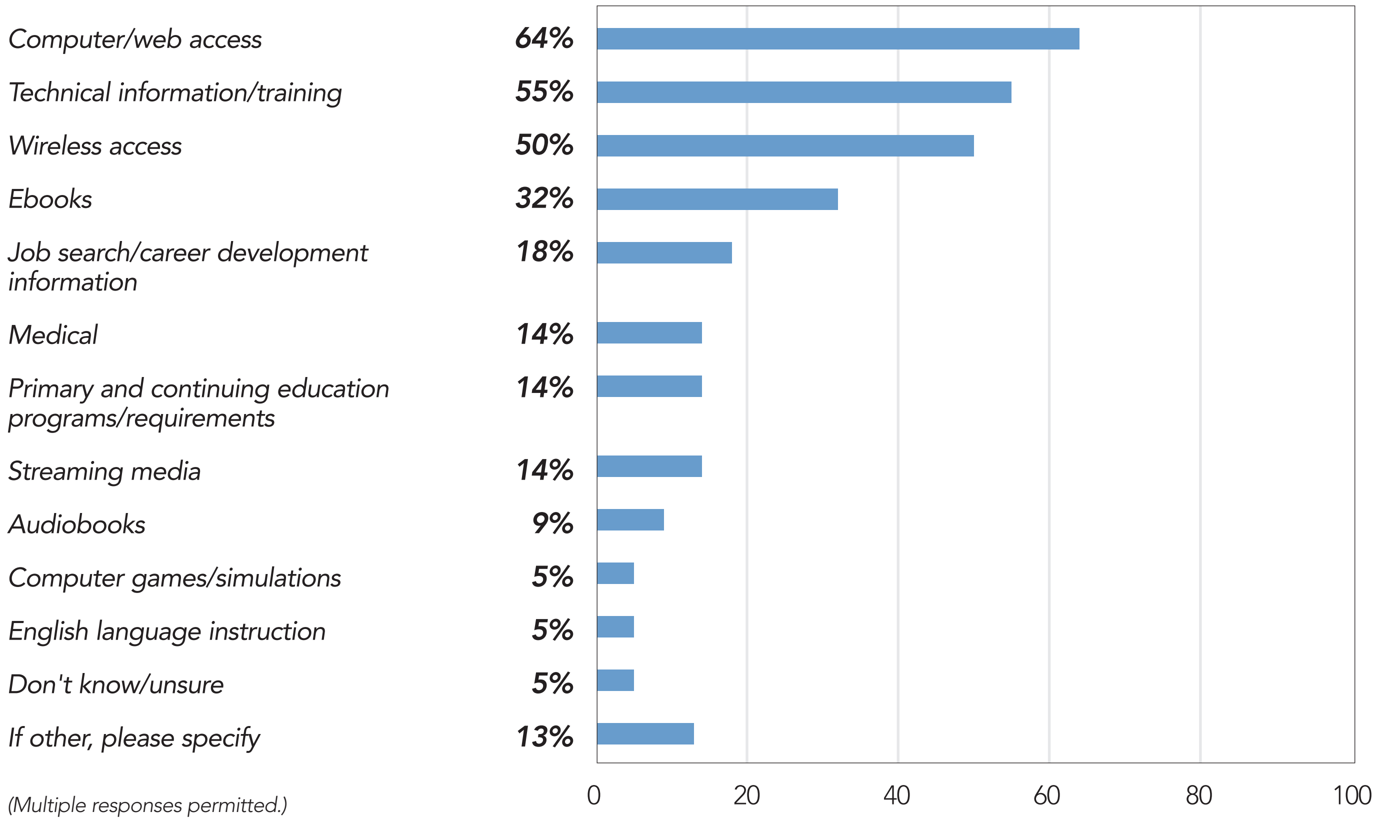
Data collection and analysis performed with SurveyMethods.

## Figure 27: What Government Agency Library Users Have Been Requesting Over the Past Year




*(Multiple responses permitted.)*

## Figure 28: Changes in Special/Corporate/Foundation/Professional Library Spending on Information Technology Hardware, Software and Related IT Services

| *(Not including online subscriptions)* | 2009–10 | 2010–11 | 2011–12 (PROJECTED) |
|---|---|---|---|
| *Increase* | ***21%*** | ***26%*** | ***40%*** |
| *No change* | ***57%*** | ***55%*** | ***39%*** |
| *Decrease* | ***6%*** | ***7%*** | ***5%*** |
| *Don't know/unsure* | ***16%*** | ***11%*** | ***16%*** |

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

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Data collection and analysis performed with SurveyMethods.

## Figure 29: Changes in Special/Corporate/Foundation/Professional Library Spending on Information Technology Hardware, Software and Related IT Services—By Population Size Served

| | <10,000 | >10,000 |
|---|---|---|
| *Increased 2010–2011* | ***26%*** | ***25%*** |
| *Increase 2011–2012 (projected)* | ***32%*** | ***67%*** |

## Figure 30: Changes in Special/Corporate/Foundation/Professional Library Spending on Online Subscriptions

| | 2009–10 | 2010–11 | 2011–12 (PROJECTED) |
|---|---|---|---|
| *Increase* | ***46%*** | ***48%*** | ***48%*** |
| *No change* | ***37%*** | ***34%*** | ***42%*** |
| *Decrease* | ***9%*** | ***15%*** | ***3%*** |
| *Don't know/unsure* | ***9%*** | ***3%*** | ***7%*** |

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

## Figure 31: Changes in Special/Corporate/Foundation/Professional Library Spending on Online Subscriptions —By Population Size Served

| *(Not including online subscriptions)* | <10,000 | >10,000 |
|---|---|---|
| *Increased 2010–2011* | ***50%*** | ***44%*** |
| *Increase 2011–2012 (projected)* | ***51%*** | ***37%*** |

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## Figure 32: Changes in Government Agency Library Spending on Information Technology Hardware, Software and Related IT Services

*(Not including online subscriptions)*

| | 2009–10 | 2010–11 | 2011–12 (PROJECTED) |
|---|---|---|---|
| *Increase* | ***40%*** | ***24%*** | ***24%*** |
| *No change* | ***30%*** | ***38%*** | ***33%*** |
| *Decrease* | ***7%*** | ***14%*** | ***19%*** |
| *Don't know/unsure* | ***22%*** | ***24%*** | ***24%*** |

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

## Figure 33: Changes in Government Agency Library Spending on Online Subscriptions

| | 2009–10 | 2010–11 | 2011–12 (PROJECTED) |
|---|---|---|---|
| *Increase* | ***57%*** | ***38%*** | ***33%*** |
| *No change* | ***23%*** | ***43%*** | ***29%*** |
| *Decrease* | ***8%*** | ***14%*** | ***29%*** |
| *Don't know/unsure* | ***12%*** | ***5%*** | ***10%*** |

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

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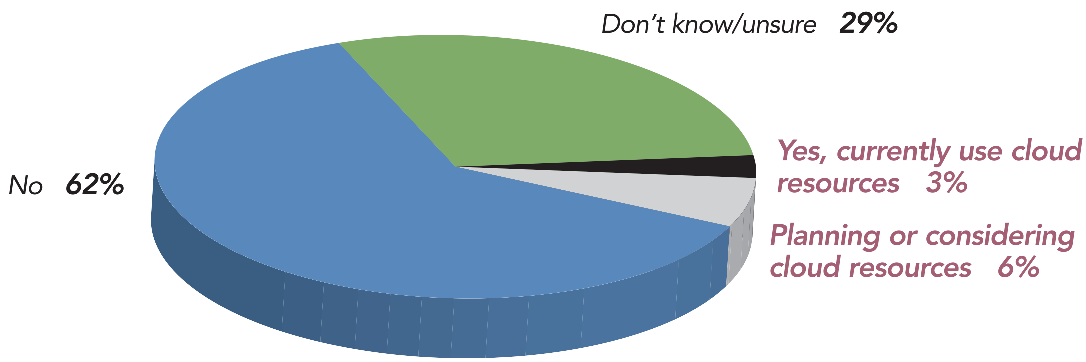
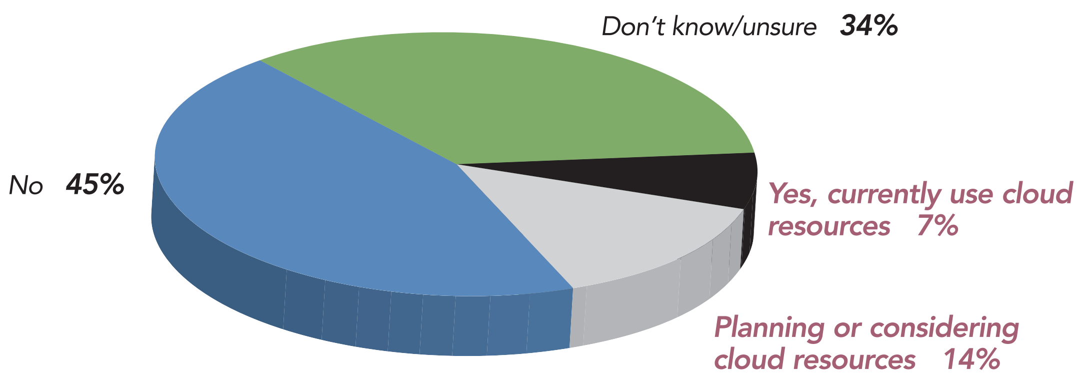
Data collection and analysis performed with SurveyMethods.

## Figure 34: Access Cloud Computing Resources? (Special/Corporate/Foundation/Professional Libraries)

2011

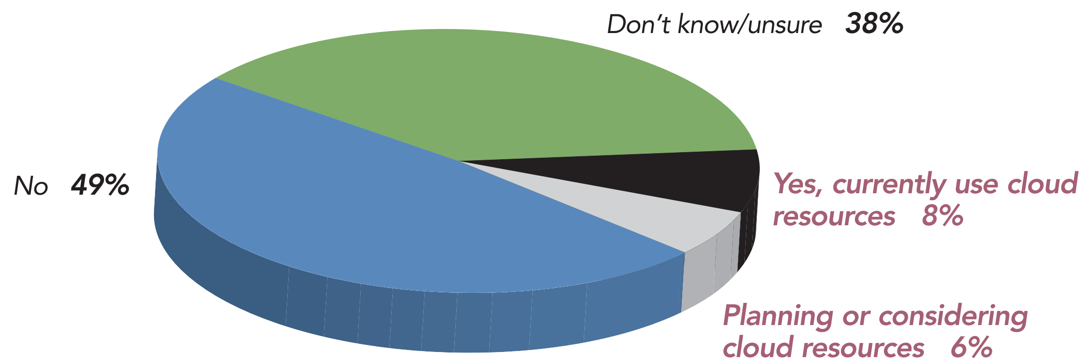



2012

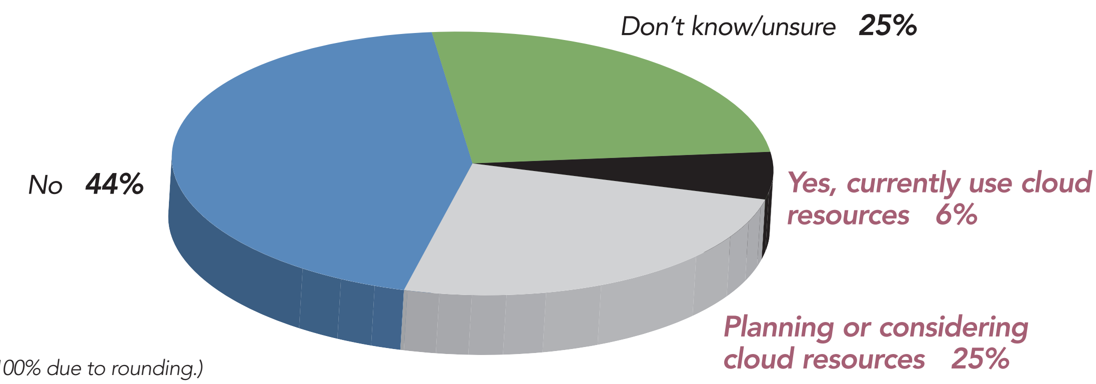


## Figure 35: Access Cloud Computing Resources (Special/Corporate/ Foundation/Professional Libraries)—By Populations Served

<10,000




>10,000




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

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Data collection and analysis performed with SurveyMethods.

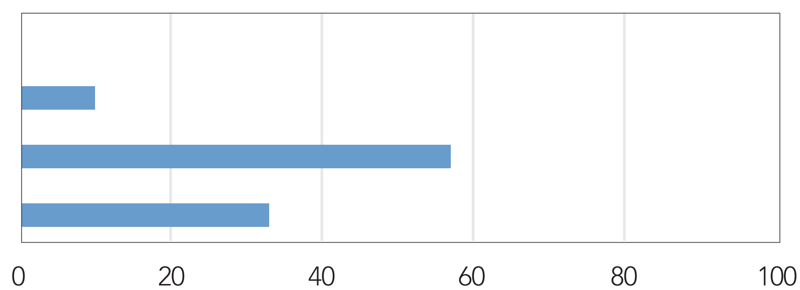
## Figure 36: Cloud Computing Services Used or Planned for Use by Special/Corporate/Foundation/Professional Libraries

| | 2011 | 2012 |
|---|---|---|
| *Communications (web conferencing, video, podcasting, email, collaboration)* | ***21%*** | ***22%*** |
| *IT infrastructure (online storage, processing)* | ***12%*** | ***16%*** |
| *Specialized business applications (business, management, marketing, market research)* | ***5%*** | ***8%*** |
| *Don't know/not sure* | ***70%*** | ***59%*** |
| *Other* | ***5%*** | ***10%*** |

*(Multiple responses permitted.)*

## Figure 37: Access Cloud Computing Resources? (Government Agency Libraries)

*Yes, currently use cloud resources* ***0%***
*Planning or considering cloud resources* ***10%***
*No* ***57%***
*Don't know/unsure* ***33%***

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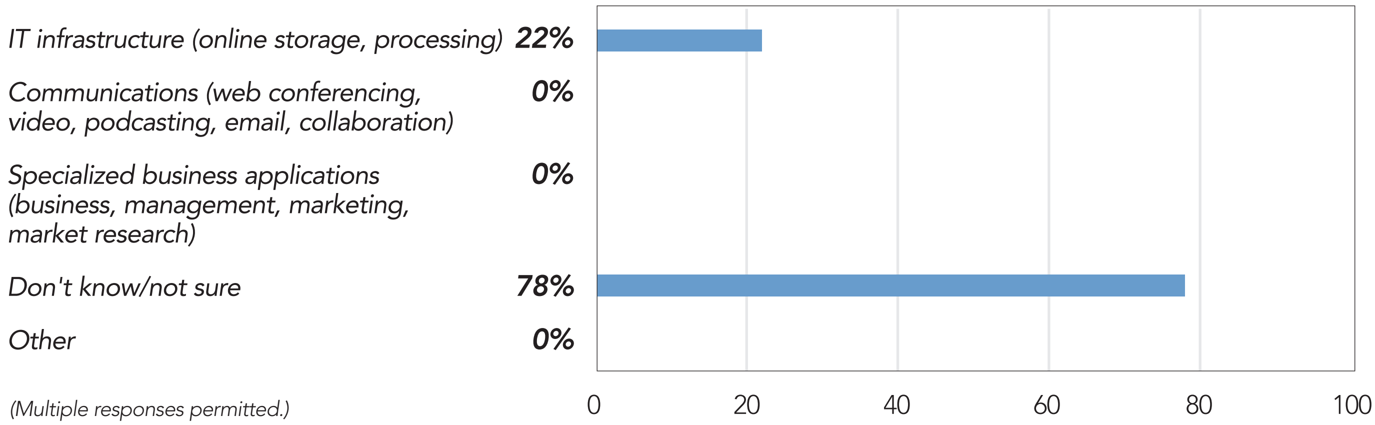
## Figure 38: Cloud Computing Services Used or Planned for Use by Government Agency Libraries




*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

## Figure 39: Current Information Technology Tools and Platforms Used Within Special/Corporate/Foundation/Professional Libraries

| | 2011 | 2012 |
|---|---|---|
| *Online library catalog/OPAC* | **82%** | **75%** |
| *Intranet/extranet/website* | **72%** | **67%** |
| *Integrated Library System (ILS)* | **42%** | **54%** |
| *Web-based (IM or email) reference service* | **38%** | **51%** |
| *LAN/WAN/wireless network* | **49%** | **43%** |
| *PCs/kiosks/laptops/mobile devices* | **35%** | **42%** |
| *Link resolvers* | **23%** | **29%** |
| *Electronic Resource Management Systems* | **16%** | **22%** |
| *Audio/video teleconferencing* | **17%** | **20%** |
| *Authentication solutions* | **21%** | **19%** |
| *RFID check-in/check-out, inventory control* | **6%** | **10%** |
| *Ebook readers* | **7%** | **7%** |
| *Discovery services* | **5%** | **6%** |
| *Other* | **6%** | **11%** |

*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

## Figure 40: Current Information Technology Tools and Platforms Used Within Special/Corporate/Foundation/Professional Libraries —By Size of Population Served

| | <10,000 | >10,000 |
|---|---|---|
| *Online library catalog/OPAC* | ***76%*** | ***75%*** |
| *Intranet/extranet/website* | ***69%*** | ***62%*** |
| *Integrated Library System (ILS)* | ***53%*** | ***56%*** |
| *Web-based (IM or email) reference service* | ***51%*** | ***44%*** |
| *LAN/WAN/wireless network* | ***41%*** | ***50%*** |
| *PCs/kiosks/laptops/mobile devices* | ***39%*** | ***50%*** |
| *Link resolvers* | ***31%*** | ***25%*** |
| *Electronic Resource Management Systems* | ***24%*** | ***19%*** |
| *Audio/video teleconferencing* | ***22%*** | ***19%*** |
| *Authentication solutions* | ***18%*** | ***19%*** |
| *RFID check-in/check-out, inventory control* | ***8%*** | ***19%*** |
| *Ebook readers* | ***4%*** | ***19%*** |
| *Discovery services* | ***3%*** | ***12%*** |
| *Other* | ***7%*** | ***25%*** |

*(Multiple responses permitted.)*

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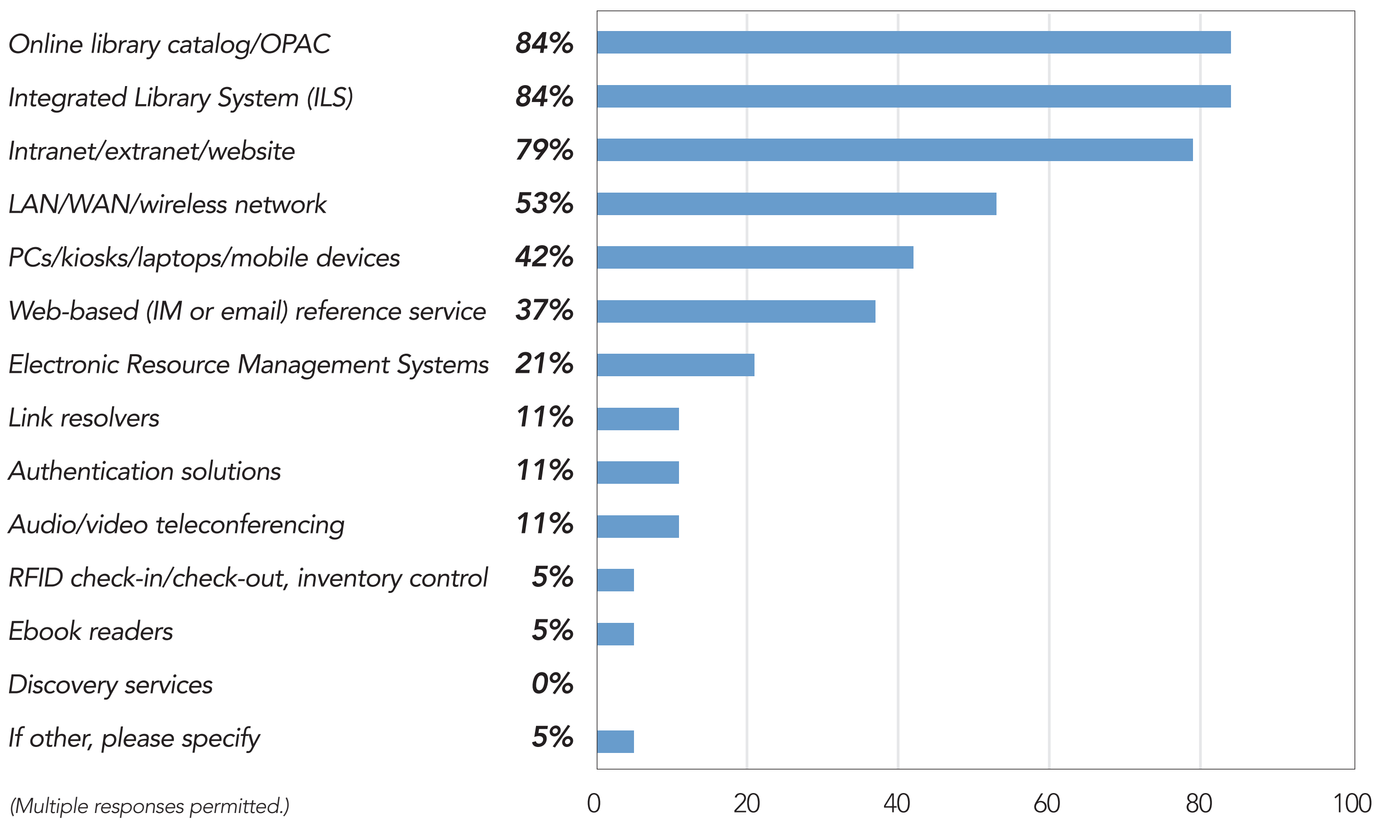
Data collection and analysis performed with SurveyMethods.

## Figure 41: Current Information Technology Tools and Platforms Used Within Government Agency Libraries




*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

## Figure 42: Information Technology Tools and Platforms to Be Purchased by Special/Corporate/Foundation/Professional Libraries in 2012

| | 2011 | 2012 |
|---|---|---|
| *Online library catalog/OPAC* | **25%** | **24%** |
| *Intranet/extranet/website* | **14%** | **22%** |
| *Link resolvers* | **5%** | **18%** |
| *Electronic Resource Management Systems* | **10%** | **18%** |
| *PCs/kiosks/laptops/mobile devices* | **15%** | **18%** |
| *Ebook readers* | **14%** | **16%** |
| *Discovery services* | **4%** | **16%** |
| *Web-based (IM or email) reference service* | **11%** | **12%** |
| *Authentication solutions* | **1%** | **12%** |
| *Integrated Library System (ILS)* | **20%** | **10%** |
| *LAN/WAN/wireless network* | **2%** | **8%** |
| *Audio/video teleconferencing* | **2%** | **6%** |
| *RFID check-in/check-out, inventory control* | **6%** | **2%** |
| *Other* | **21%** | **19%** |

*(Multiple responses permitted.)*

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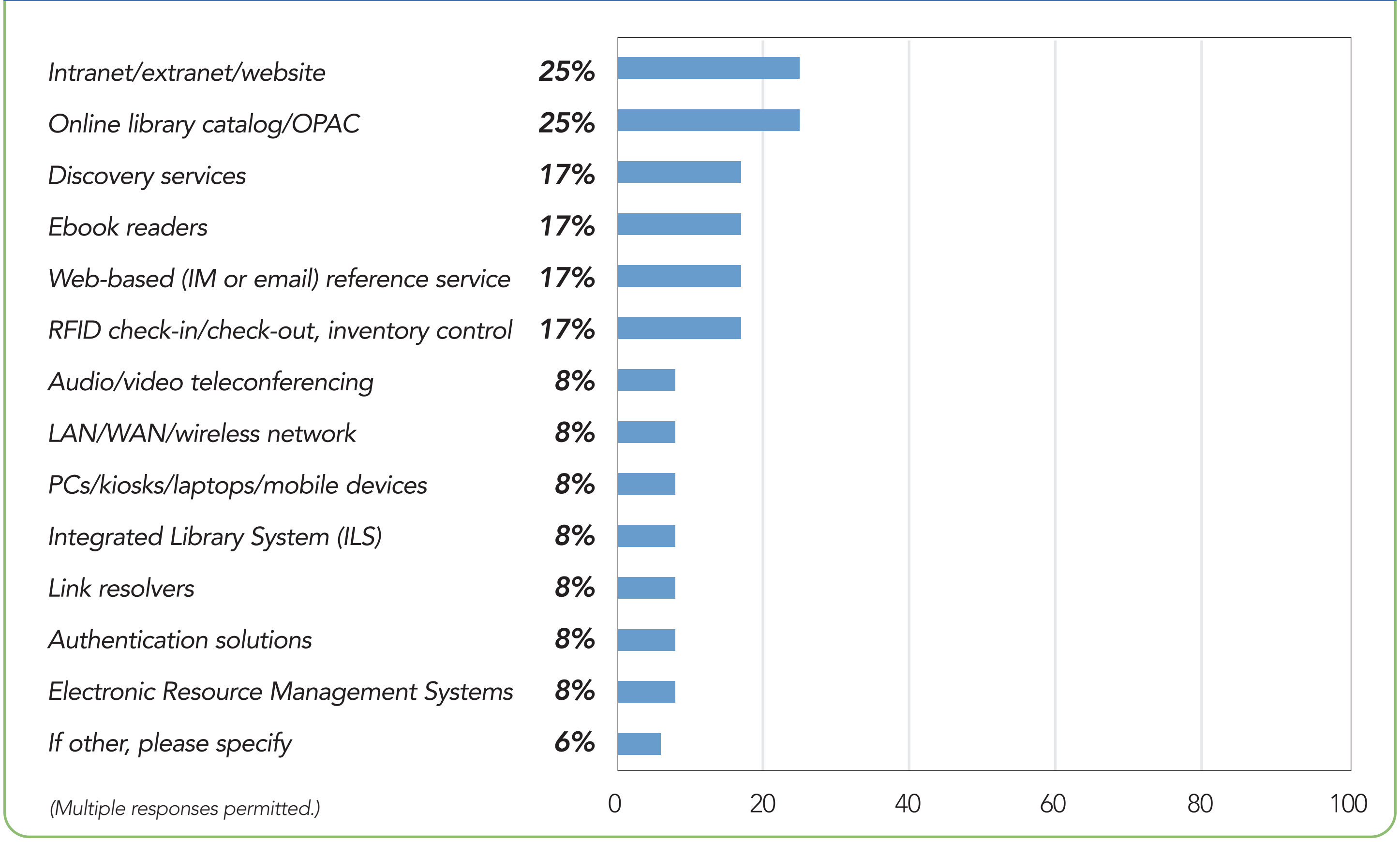
## Figure 43: Information Technology Tools and Platforms to Be Purchased by Government Agency Libraries in 2012

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Data collection and analysis performed with SurveyMethods.

## Figure 44: Social Networking Services in Use at Special/Corporate/ Foundation/Professional Libraries

| | 2011 | 2012 |
|---|---|---|
| *Social networking (e.g., Facebook, LinkedIn)* | ***26%*** | ***31%*** |
| *Wikis or blogs* | ***31%*** | ***31%*** |
| *Sharing library web pages and subject guides (e.g., LibGuides)* | ***20%*** | ***30%*** |
| *Document-sharing web apps* | ***12%*** | ***22%*** |
| *Tagging and rating* | ***7%*** | ***17%*** |
| *Audio or video podcasts* | ***15%*** | ***16%*** |
| *Patron reviews, ratings* | ***9%*** | ***16%*** |
| *Photo or video-sharing web apps* | ***4%*** | ***8%*** |
| *Don't know/unsure* | ***22%*** | ***17%*** |
| *Other* | ***1%*** | ***4%*** |
| *We don't offer social networking tools/opportunities* | ***32%*** | ***30%*** |

*(Multiple responses permitted.)*

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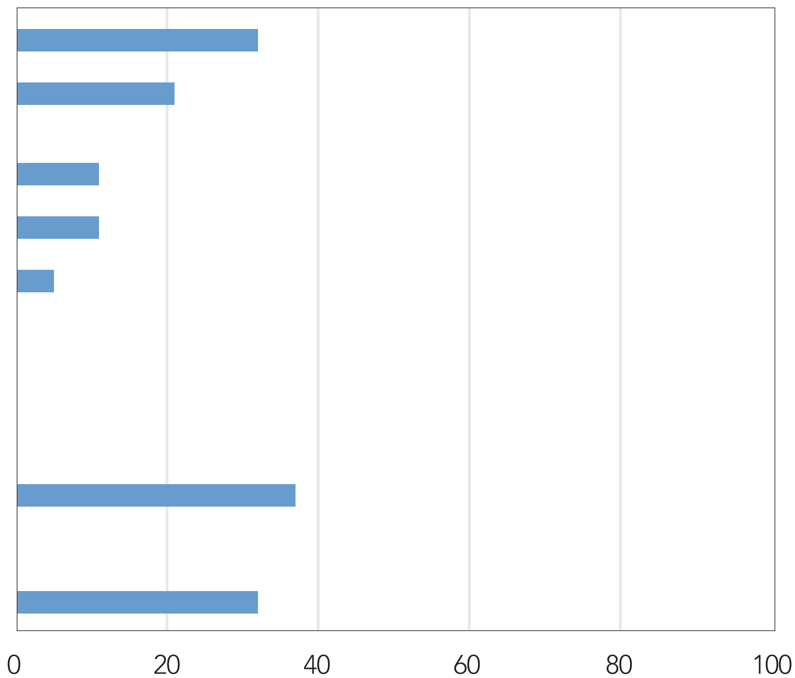
Data collection and analysis performed with SurveyMethods.

# Figure 45: Social Networking Services in Use at Government Agency Libraries

| | |
|---|---|
| *Wikis or blogs* | ***32%*** |
| *Sharing library web pages and subject guides (e.g., LibGuides)* | ***21%*** |
| *Document-sharing web apps* | ***11%*** |
| *Social networking (e.g., Facebook, LinkedIn)* | ***11%*** |
| *Patron reviews, ratings* | ***5%*** |
| *Tagging and rating* | ***0%*** |
| *Photo or video-sharing web apps* | ***0%*** |
| *Audio or video podcasts* | ***0%*** |
| *Don't know/unsure* | ***37%*** |
| *If other, please specify* | ***0%*** |
| *We don't offer social networking tools/ opportunities* | ***32%*** |




*(Multiple responses permitted.)*

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## STRATEGIES: LOOKING FORWARD INTO THE NEXT DECADE

**Improvement of customer service and outreach to constituencies dominates the agendas of most special, corporate, foundation and professional libraries this year. Budgets remain tight, and many institutions are exploring new sources of funding. Larger special, corporate, foundation and professional libraries—as well as government facilities—have strategic plans that map out short-term and long-term missions for their institutions. Government agency libraries are focusing on providing greater support for digital services and offerings.**

When asked what their leading priorities would be over the coming year, a majority of respondents with special, corporate, foundation, and professional libraries, 58%, say they want to improve or expand the scope of their customer service, up from 41% a year ago. Likewise, 58% also say they intend to increase their commitment to provide assistance and education on information access tools and services, up from 47% a year ago. This growing emphasis on both customer service and the provisioning of digital resources indicates that special, corporate, foundation, and professional libraries are recognizing an enhanced role as service providers to their constituencies, versus merely serving as repositories of books and reference materials. There is also more impetus to embrace new approaches to attract patrons, such as building unique library collections (from 21% to 27%), and instituting special programs (from 15% to 20%). (See Figure 46.)

Among government agency libraries, there is an overwhelming drive to help patrons increase their access to digital resources, cited by 71% of respondents. A majority, 57%, are also focusing on delivering more customer service to their users. Close to half also are looking at better ways to provide assistance and education on information access tools and services. Many also feel that their current resources are underutilized; close to half also are looking at ways to driver greater usage. (See Figure 47.)

Tight budgets do remain a challenge for a majority of special, corporate, foundation, and professional libraries. As shown earlier in the report, many service and acquisition budgets are still being pared, and more than three-fourths of respondents see this as their greatest challenge over the next 5 years. The requirement to keep up with fast-paced changes in the information technology world is also keeping librarians awake at night, indicated by a majority of respondents, 55%, unchanged from a year ago. There is also growing anxiety about the migration to digital; 44% say moving existing print resources to digital is a great concern, up from 35% in last year's survey. (See Figure 48.)

These challenges, of course, are seen across all special, corporate, foundation, and professional libraries, regardless of size. Still, some issues—such as budget constraints and digital migration—are being felt more acutely at smaller institutions than their larger counterparts. The largest libraries in the survey are more acutely focused on keeping up with technology, and identifying new funding sources to maintain services and operations. (See Figure 49.)

As seen throughout this survey report, the budget knife has been hitting government agency libraries hard. It's not surprising, then, to see that respondents in this sector almost unanimously cite tight budgets as their leading challenge. Concerns over money are far outpacing other challenges at this point, including keeping up with technology shifts. (See Figure 50.)

Managers of special, corporate, foundation, and professional libraries are working hard to define their institutions' new roles in the midst of the cross-currents of lean finances and digital demand. However, few have roadmaps to solidify their short-term and long-term plans. Only about one-fifth, 21%, are articulating their visions through strategic plans, similar to those followed by businesses and government agencies. This is up modestly from last year, however. (See Figure 51.) By library size, however, larger libraries (from institutions with more than 10,000 constituents on up) are more inclined to have such plans, as cited by 37%. (See Figure 52.)

One-third of government agency libraries report having a strategic plan in place. (See Figure 53.)

A common strategy for many libraries is to pool their resources and purchases from consortia and networks. A majority of special, corporate, foundation, and professional library managers indicate they belong to between one and three consortia. There has been some growth in memberships as well. Twelve percent of respondents to this survey report being part of more than three consortia, versus 7% a year ago. (See Figure 54.) Respondents also report greater levels of support from the consortia to which they belong. About 25% report increased support over the past year, up significantly from 11% in last year's survey. (See Figure 55.)

For the most part, government agency libraries are part of a single consortium. (See Figure 56.) The level of support received may be weak, with only 18% reporting increased activity over the past year. (See Figure 57.) Given the continuing cutbacks seen in this sector, consortia may be an opportunity to pool and take advantage of scarce resources.

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Data collection and analysis performed with SurveyMethods.

## Figure 46: Special/Corporate/Foundation/Professional Libraries' Priorities for the Coming Year

| | 2011 | 2012 |
|---|---|---|
| *Improve/expand customer service* | **41%** | **58%** |
| *Provide assistance/education on inf. access tools/svcs* | **47%** | **58%** |
| *Increase availability of online pubs/digital access* | **55%** | **55%** |
| *Identify and reach out to new groups of patrons* | **38%** | **42%** |
| *Drive usage of current resources* | **44%** | **41%** |
| *Enhance discovery of collections* | **38%** | **35%** |
| *Repurpose physical space* | **23%** | **30%** |
| *Develop unique library collections* | **21%** | **27%** |
| *Institute special programs for constituents/patrons* | **15%** | **20%** |
| *Enhance user workflow tools* | **12%** | **20%** |
| *Physical expansion/upgrade of facilities* | **12%** | **18%** |
| *Join or increase participation in consortium/network* | **20%** | **17%** |
| *Don't know/unsure* | **5%** | **3%** |
| *Other* | **3%** | **8%** |

*(Multiple responses permitted.)*

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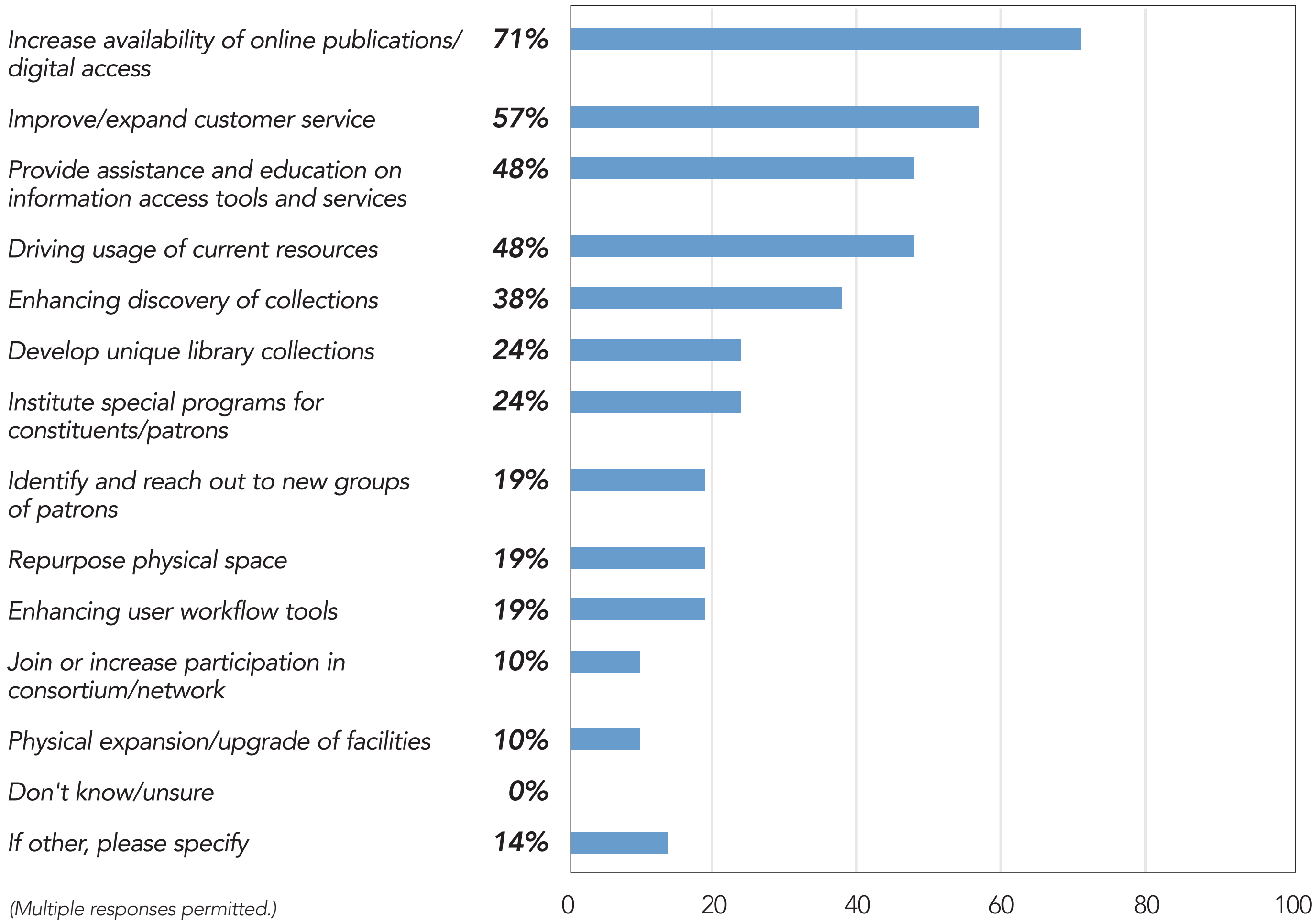
# Figure 47: Government Agency Libraries' Priorities for the Coming Year




*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

## Figure 48: Special/Corporate/Foundation/Professional Libraries' Challenges Over the Next 5 Years

| | 2011 | 2012 |
|---|---|---|
| *Maintaining services with tight budgets* | ***81%*** | ***77%*** |
| *Keeping up with changes in information technology* | ***55%*** | ***55%*** |
| *Migrating print content to digital formats* | ***35%*** | ***44%*** |
| *Identifying new sources of funding* | ***36%*** | ***31%*** |
| *Finding and retaining knowledgeable staff* | ***24%*** | ***24%*** |
| *Competing/keeping up with public online svcs/offerings* | ***19%*** | ***21%*** |
| *Keeping facilities open/at preferred operational levels* | ***24%*** | ***17%*** |
| *Other* | ***5%*** | ***9%*** |

*(Multiple responses permitted.)*

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Data collection and analysis performed with SurveyMethods.

# Figure 49: Special/Corporate/Foundation/Professional Libraries' Challenges Over the Next 5 Year—By Population Served

| | <10,000 | >10,000 |
|---|---|---|
| *Maintaining services with tight budgets* | ***79%*** | ***69%*** |
| *Keeping up with changes in information technology* | ***53%*** | ***62%*** |
| *Migrating print content to digital formats* | ***47%*** | ***31%*** |
| *Identifying new sources of funding* | ***26%*** | ***44%*** |
| *Finding and retaining knowledgeable staff* | ***23%*** | ***19%*** |
| *Competing/keeping up with public online svcs/offerings* | ***22%*** | ***19%*** |
| *Keeping facilities open/at preferred operational levels* | ***17%*** | ***19%*** |
| *Other* | ***7%*** | ***19%*** |

*(Multiple responses permitted.)*

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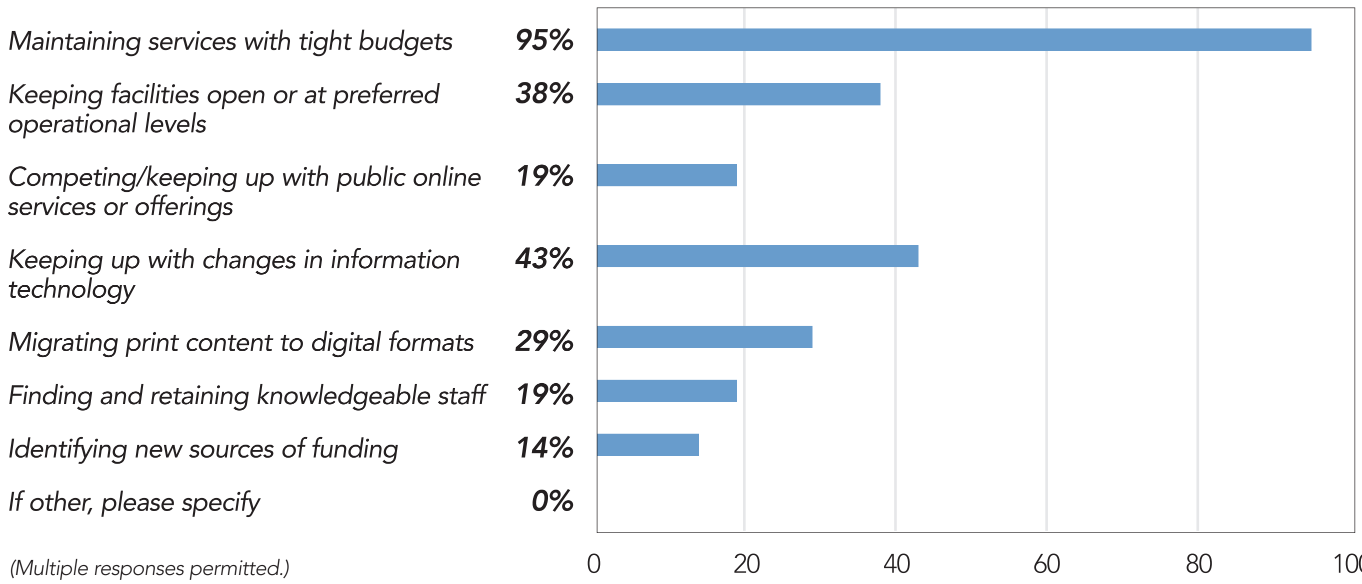
Data collection and analysis performed with SurveyMethods.

## Figure 50: Government Agency Libraries' Challenges Over the Next 5 Years




*(Multiple responses permitted.)*

## Figure 51: Special/Corporate/Foundation/Professional Library Have Strategic Plan?

| | 2011 | 2012 |
|---|---|---|
| *Yes* | ***18%*** | ***21%*** |
| *Under development* | ***32%*** | ***31%*** |
| *Under consideration* | ***11%*** | ***21%*** |
| *No* | ***35%*** | ***23%*** |
| *Don't know/unsure* | ***5%*** | ***4%*** |

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

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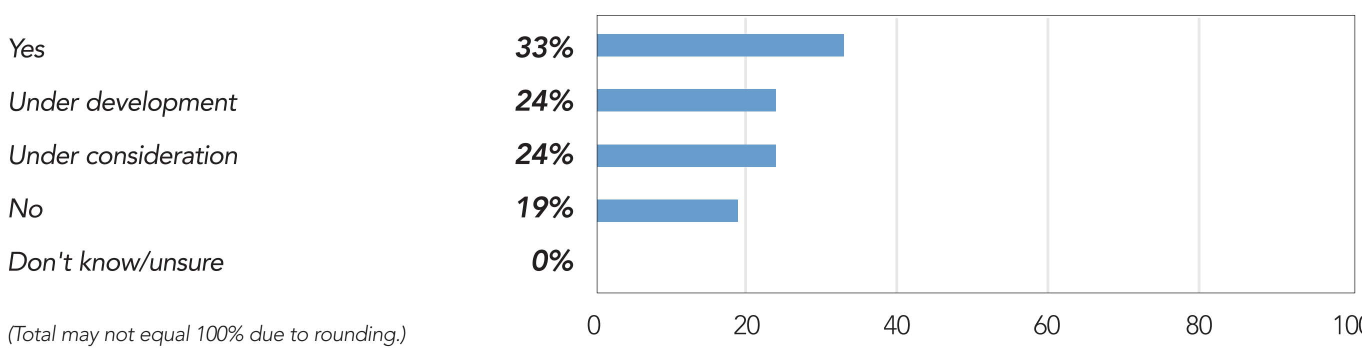
Data collection and analysis performed with SurveyMethods.

## Figure 52: Special/Corporate/Foundation/Professional Library Have Strategic Plan—By Population Size Served

| | >10,000 | >10,000 |
|---|---|---|
| *Yes* | ***17%*** | ***37%*** |
| *Under development* | ***32%*** | ***25%*** |
| *Under consideration* | ***19%*** | ***25%*** |
| *No* | ***26%*** | ***12%*** |
| *Don't know/unsure* | ***6%*** | ***0%*** |

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

## Figure 53: Government Agency Library Have Strategic Plan?




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

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Data collection and analysis performed with SurveyMethods.

## Figure 54: Number of Special/Corporate/Foundation/Professional Libraries' Consortia or Network Memberships

| | >10,000 | >10,000 |
|---|---|---|
| *None* | ***26%*** | ***25%*** |
| *One* | ***23%*** | ***23%*** |
| *Two* | ***18%*** | ***24%*** |
| *Three* | ***17%*** | ***14%*** |
| *Four* | ***4%*** | ***10%*** |
| *Five* | ***1%*** | ***1%*** |
| *More than five* | ***2%*** | ***1%*** |
| *Don't know/unsure* | ***9%*** | ***1%*** |

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

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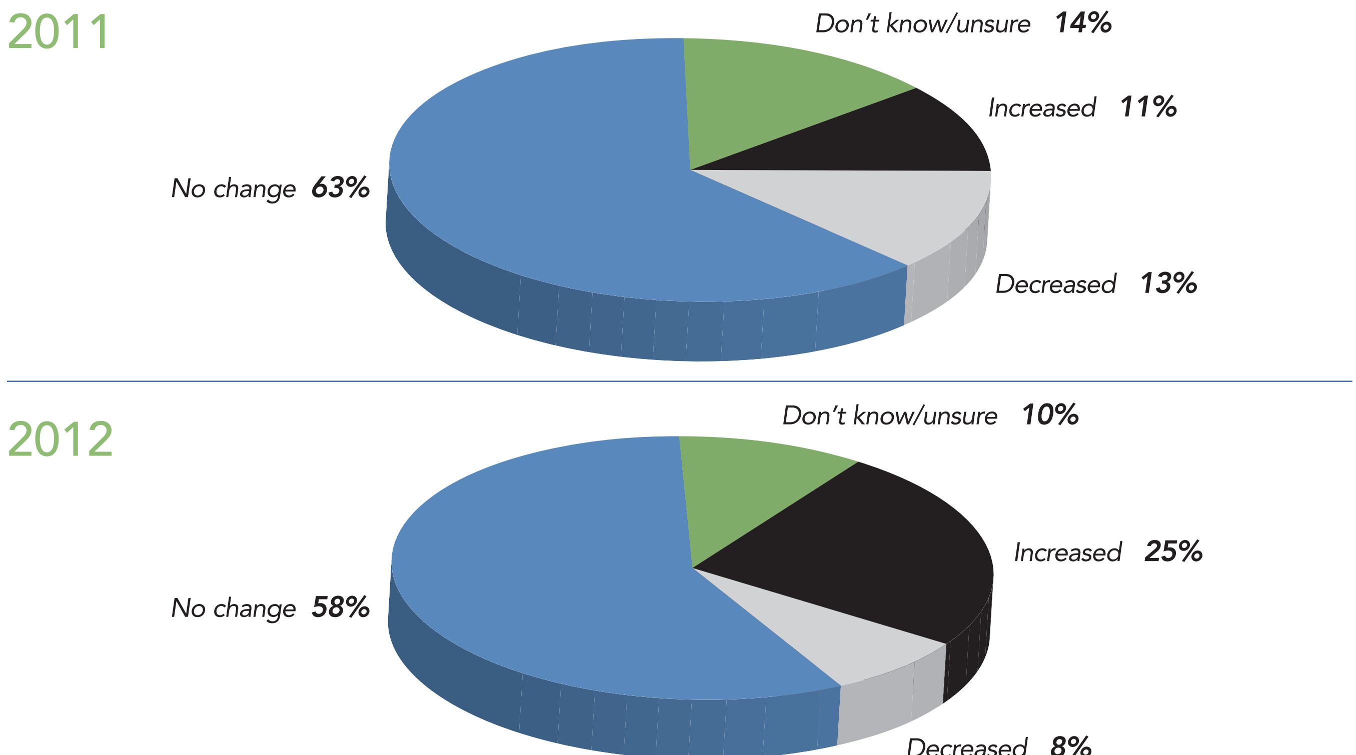
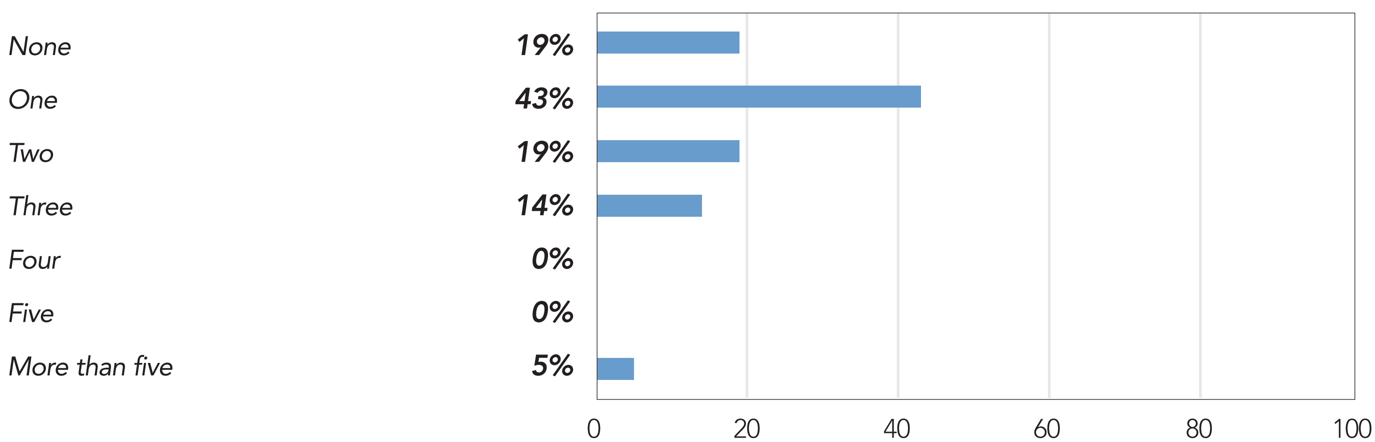
Data collection and analysis performed with SurveyMethods.

## Figure 55: Changes in Support from Consortia or Networks to Special/ Corporate/Foundation/Professional Libraries Over the Past Year




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

## Figure 56: Number of Government Agency Libraries' Consortia or Network Memberships

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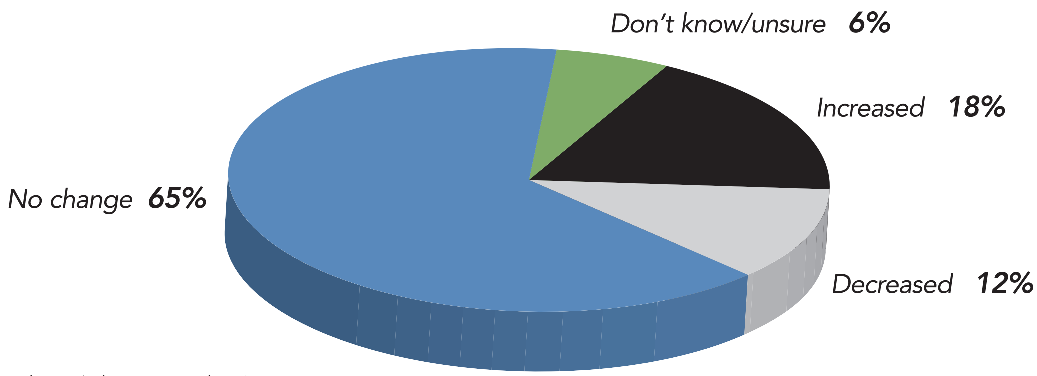
Data collection and analysis performed with SurveyMethods.

## Figure 57: Changes in Support from Consortia or Networks to Government Agency Libraries Over the Past Year




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

## DEMOGRAPHICS

### Figure 58: Respondents' Titles

| | SPECIAL/CORPORATE/FOUNDATION PROFESSIONAL | GOVERNMENT AGENCY |
|---|---|---|
| *Director/administrator* | ***26%*** | ***32%*** |
| *Librarian (all other categories)* | ***26%*** | ***23%*** |
| *Library manager* | ***22%*** | ***13%*** |
| *Information specialist/information coordinator* | ***5%*** | ***0%*** |
| *Division director/VP/Sr. VP* | ***3%*** | ***0%*** |
| *Head of collections/acquisitions* | ***2%*** | ***6%*** |
| *Head of serials* | ***2%*** | ***0%*** |
| *Chief information officer/chief knowledge officer* | ***1%*** | ***0%*** |
| *Other department head* | ***1%*** | ***0%*** |
| *Subject specialist* | ***1%*** | ***3%*** |
| *Chief librarian* | ***0%*** | ***10%*** |
| *If other, please specify* | ***12%*** | ***13%*** |

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

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## Figure 59: Size of Population Served

| | SPECIAL/CORPORATE/FOUNDATION PROFESSIONAL | GOVERNMENT AGENCY |
|---|---|---|
| *Fewer than 10,000* | 72% | 53% |
| *10,001 to 25,000* | 7% | 3% |
| *25,001 to 50,000* | 2% | 12% |
| *50,001 to 100,000* | 1% | 3% |
| *100,001 to 250,000* | 2% | 3% |
| *250,001 to 500,000* | 9% | 3% |
| *500,001 to 1 million* | 2% | 3% |
| *More than 1 million* | 2% | 16% |
| *Don't know/unsure* | 4% | 3% |

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

## Figure 60: Type of Library Infrastructures Surveyed

| | SPECIAL/CORPORATE/FOUNDATION PROFESSIONAL | GOVERNMENT AGENCY |
|---|---|---|
| *Single, independent or standalone library* | 51% | 42% |
| *Single library within a multi-branch, multi-location or multi-campus system* | 13% | 16% |
| *Entire library system with multiple branches/facilities* | 19% | 23% |
| *Unable to answer budget/finance questions** | 14% | 16% |
| *Other* | 4% | 3% |

**Did not participate in budget section of the survey. (Totals may not equal 100% due to rounding.)*

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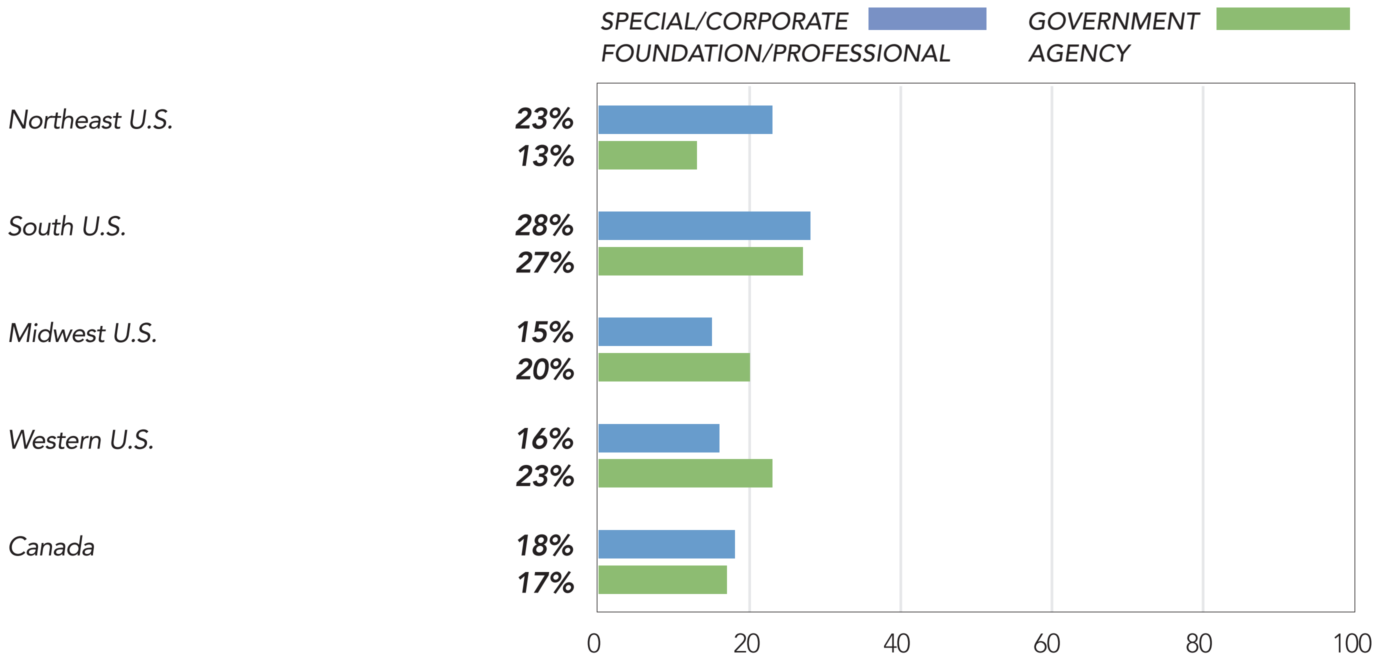
# Figure 61: Respondents' States/Provinces




## NUMERICAL TOTALS

**Northeast U.S.**

| | 23% | 13% |
|---|---|---|
| CT | 2 | 0 |
| DC | 4 | 1 |
| DE | 0 | 0 |
| MD | 1 | 0 |
| MA | 0 | 0 |
| ME | 1 | 0 |
| NH | 0 | 0 |
| NJ | 5 | 0 |
| NY | 7 | 2 |
| PA | 2 | 1 |
| RI | 0 | 0 |
| VT | 0 | 0 |
| WV | 0 | 0 |

**South U.S.**

| | 28% | 27% |
|---|---|---|
| AL | 2 | 0 |
| AR | 0 | 0 |
| FL | 7 | 1 |
| GA | 1 | 0 |
| KY | 0 | 0 |
| LA | 2 | 1 |
| MS | 0 | 1 |
| NC | 3 | 3 |
| OK | 0 | 0 |
| SC | 1 | 1 |
| TN | 3 | 0 |
| TX | 5 | 0 |
| VA | 2 | 1 |

**Midwest U.S.**

| | 15% | 20% |
|---|---|---|
| IA | 0 | 0 |
| IL | 6 | 0 |
| IN | 0 | 0 |
| KS | 0 | 2 |
| MI | 3 | 0 |
| MN | 1 | 1 |
| MO | 2 | 0 |
| ND | 0 | 2 |
| NE | 0 | 0 |
| OH | 0 | 0 |
| SD | 0 | 1 |
| WI | 2 | 0 |

**Western U.S.**

| | 16% | 23% |
|---|---|---|
| AK | 1 | 0 |
| AZ | 2 | 4 |
| CA | 7 | 1 |
| CO | 3 | 2 |
| HI | 1 | 0 |
| ID | 0 | 0 |
| MT | 0 | 0 |
| NM | 0 | 0 |
| NV | 1 | 0 |
| OR | 0 | 0 |
| UT | 0 | 0 |
| WA | 0 | 0 |
| WY | 0 | 0 |

**Canada**

| | 18% | 17% |
|---|---|---|
| ALB | 2 | 1 |
| BC | 1 | 1 |
| MAN | 0 | 0 |
| NB | 0 | 0 |
| NEWF/LAB | 0 | 0 |
| NS | 0 | 0 |
| NWT | 0 | 0 |
| NUN | 0 | 0 |
| ONT | 10 | 3 |
| PEI | 0 | 0 |
| QUE | 4 | 0 |
| SAS | 0 | 0 |
| YUK | 0 | 0 |

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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 December 1, 2011, and December 31, 2011. 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 730 valid surveys were gathered.

## 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 Research is uniquely capable of producing cogent market analysis through this experience and its working relationship with the editors of Information Today, Inc.'s (ITI's) library products.

Information Today, Inc. (www.infotoday.com) is the publisher and producer of a wide range of information products, including books, directories, magazines, newsletters and conferences, all targeted at the library and information professional community. Among ITI's publications are the *American Library Directory, The Library and Book Trade Almanac, Computers in Libraries* magazine and the flagship *Information Today* newspaper.

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

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