

LIBRARIES ACHIEVE EQUILIBRIUM BETWEEN DIGITAL AND PRINT AS BUDGETS ADVANCE

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY
ON 2016 SPECIAL, CORPORATE, PROFESSIONAL, AND
GOVERNMENT AGENCY LIBRARY SPENDING PLANS

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Produced by Unisphere Research, a division of Information Today, Inc.



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HIGHLIGHTS

This new study of 120 special, corporate, professional, and government agency library managers and librarians was conducted by the *Library Resource Guide (LRG)*—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, which was administered in the September-November 2015 time period among libraries listed in ITI's *American Library Directory*, reveals current spending patterns for public, academic, government, and special libraries, and provides projections for budgets and spending trends for 2016. This report is a subset of a larger study, which covered a total of 827 libraries, including academic, special, and government agency libraries, along with public libraries.

More than one-third of respondents to the survey, 35%, are managers or department heads. Another 19% are librarians. Close to half are single, independent, or standalone libraries, while another 13% are single facilities that are part of a larger multi-branch or multi-campus system. About 19% of respondents are reporting for entire library systems with multiple branches and facilities. (For detailed demographic breakdowns, see Figures 22–25 at the end of this report.)

The vast majority of respondents, 70%, serve populations of fewer than 25,000 patrons, and 11% serve between 25,000 and 100,000 people.

For brevity, throughout this report, we will refer to special, corporate, professional, and government agency libraries as “special” libraries. The largest contingent of this group, with 32%, is government agency libraries—libraries that exist internally as part of federal, state, provincial, or quasi-government agencies,

and are not the same as “public community” libraries that are typically funded by local municipalities and service a broad range of needs to the general public. (Public library budgets and technology trends are covered in a separate report.) Another 17% are libraries affiliated with healthcare establishments, and 17% serve nonprofit organizations, such as foundations, associations, or museums. Ten percent are legal libraries.

Key findings from the survey include the following:

- Gradually emerging from a 5-year trough, budgets for special libraries have been growing. More funding is going to digital subscriptions and ebooks.
- The shift to digital media and content within special libraries continues unabated. Demand for electronic resources is rising, though there also has been more demand for print. Special libraries are seeing increasing demand for specialized, technical information, which helps define their mission.
- Special library managers are increasingly focusing on building their digital service offerings, and this is likely to continue into the foreseeable future. While being more responsive to their customer demand, few see the need for libraries to operate in a manner more similar to businesses.

On the following pages are the results of the survey, reflecting the balance between providing customer service and managing financial challenges that today's special, corporate, professional, and government agency libraries are striving to achieve.

PUBLIC LIBRARY FINANCES: A GOOD TIME FOR SMALLER LIBRARIES

Gradually emerging from a 5-year trough, budgets for special libraries have been growing. More funding is going to digital subscriptions and ebooks.

Today's special, corporate, professional, and government agency library managers face a range of challenges, from delivery of specialized services to assessing whether to offer print or digital versions of content and collections.

A majority of the 120 library managers responding to this survey, 61%, indicate they have some degree of purchasing authority within their facilities. (See Figure 1.) On the following pages are the latest trends and patterns pertaining to current and planned budgets and acquisitions.

Close to one in five of the special libraries covered in this survey has a budget of at least \$1 million a year or greater. This is relatively unchanged since the first survey of this series was conducted in 2011. Overall, the average reported budget is about \$1 million. (See Figure 2.)

Notably, budgets have been on the rise—40% cite increases in their annual budgets this year, up 10 percentage points from last year's survey, and well up from the lows seen in the year 2012—in the aftermath of the “Great Recession.” However, while the economy is stronger, special library managers are not as optimistic about the fiscal year ahead, with only 28% anticipating further increases. (See Figure 3.)

Where does the money go in special libraries? Thirty-nine cents of every dollar goes to acquiring new materials, roughly the same as in years past. A comparable amount of money is being spent on staffing—38 cents on every special library budget dollar is spent on personnel. Another 15 cents of every dollar goes to systems and software, which represents an increase over previous years, suggesting that special libraries are gearing up for

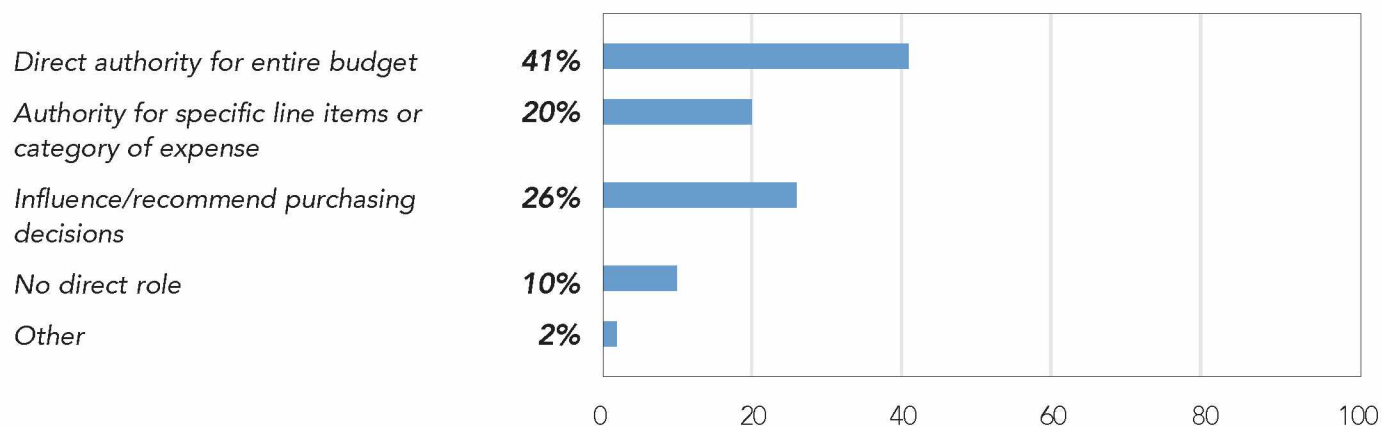
the digital revolution. (See Figure 4.) It's notable that 52 cents of every content acquisition dollar goes to digital content (online databases and ebooks), up from 36 cents 5 years ago. Forty cents goes to print (serials/periodicals, or printed books and other printed materials), down from 53 cents during the same timeframe. (See Figure 5.)

At least 85% of the special libraries have had budget cuts in one or more areas in the past year. Most of the cuts have been taking place against print subscriptions, mentioned by 42%—down from 48% last year. Another 35% have cut back on training and travel, which is up from previous years. There has been less trimming of online subscriptions, and less urgency to renegotiate contracts. The good news is that there has been a plunge in the percentage of libraries decreasing staff—dropping from 31% last year to 16%. Fewer have instituted salary freezes. (See Figure 6.)

There may be areas of library operations getting reduced, but 67% of special library managers also report that they have been boosting spending in other areas. Close to half, 46%, say they have boosted online subscriptions, up from 28% a year ago. Another 24% are increasing spending on digital content collections. Ebook acquisitions are also up. Unlike public and academic libraries, there appears to be little interest in establishing 3D printing facilities within special libraries. (See Figure 7.)

The primary source of special library funding is mainly corporate donations or allocations. Following at a distant second and third are private gifts/donations and state funding. (See Figure 8.)

Figure 1: Respondents' Roles in Managing Budgets



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

Figure 2: Annual Special/Corporate/Foundation/Professional/Government Agency Library Budget Ranges

(All costs, including operations, acquisitions, and staffing.)

2016 AVERAGE = \$1,020,940

	2011	2012	2013	2015	2016
Less than \$100,000	—	21%	31%	24%	20%
\$100,000 to \$500,000	70%*	37%	31%	36%	28%
\$500,000 to \$1,000,000	11%	17%	17%	20%	19%
\$1 million to \$3 million	10%	12%	15%	15%	14%
\$3 million to \$5 million	5%	4%	0%	0%	0%
More than \$5 million	3%	6%	2%	2%	5%
Don't know/unsure	2%	1%	4%	3%	3%

*Reported category was "less than \$500,000" in 2011 survey.

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

Figure 3: Changes in Special/Corporate/Foundation/Professional/Government Agency Library Budgets

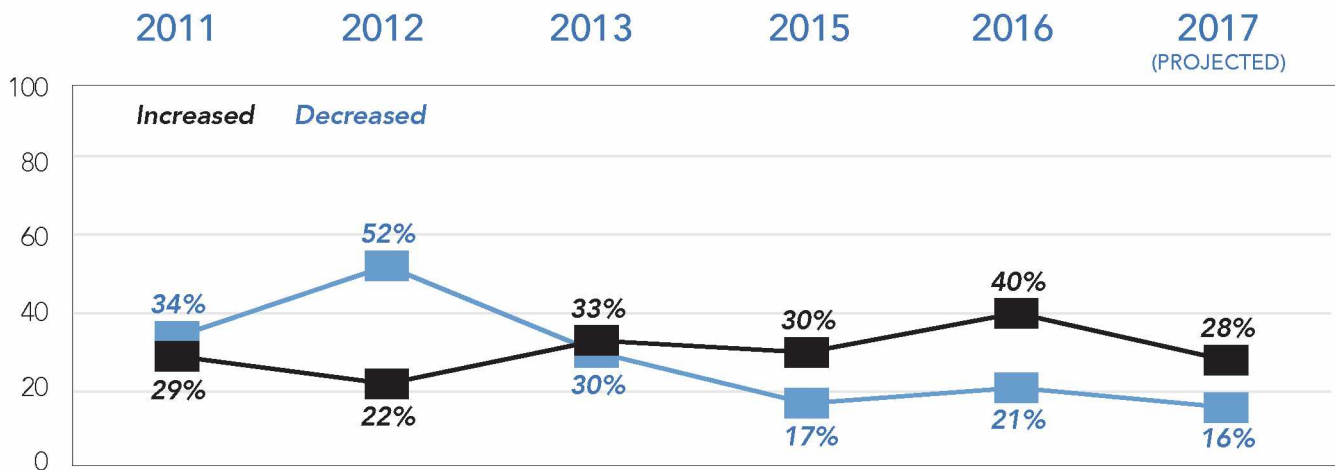


Figure 4: Allocation of Overall Special/Corporate/Foundation/Professional/Government Agency Library Budgets

(All costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Content acquisitions/collection development	40%	39%	37%	41%	39%
Personnel/staffing	37%	42%	43%	34%	38%
Library systems, computers, A/V, media equipment, software/services	11%	10%	9%	13%	15%
Operations/facilities	7%	6%	7%	10%	5%
Other	5%	3%	3%	3%	2%

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

Figure 5: Allocation of Special/Corporate/Foundation/Professional/
Government Agency Library Content Acquisitions Budgets

	2011	2012	2013	2015	2016
<i>Online databases, digital content collections</i>	33%	36%	47%	44%	48%
<i>Ebooks</i>	3%	3%	5%	7%	4%
<i>Serials/periodicals (print)</i>	30%	30%	21%	23%	19%
<i>Printed books & other printed materials</i>	23%	20%	21%	18%	21%
<i>Media titles (video, audio, computer-based modules, etc.)</i>	1%	3%	3%	2%	2%
<i>Other (microforms, manuscripts, archives, preservation, etc.)</i>	4%	4%	0%	1%	1%
<i>All other categories</i>	2%	5%	2%	3%	1%

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

Figure 6: Actions Taken by Special/Corporate/Foundation/Professional/Government Agency Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year

	2011	2012	2013	2015	2016
Cut spending on print subscriptions	49%	46%	40%	48%	42%
Cut or eliminated conference/travel/education budget	42%	32%	21%	33%	35%
Cut spending on online subscriptions	—	35%	24%	34%	25%
Renegotiated contracts with vendors	30%	29%	26%	36%	24%
Moved more services/materials online	26%	14%	19%	28%	20%
Reduced library hours	8%	14%	7%	8%	18%
Staff layoffs/staff hours cut	18%	19%	21%	31%	16%
Salary freezes	31%	30%	12%	23%	15%
Collaborated/shared with other libraries/joined consortia	15%	14%	7%	16%	11%
Added volunteers	20%	11%	5%	14%	11%
Applied for more grants	12%	10%	5%	16%	9%
Reduced programming	8%	10%	5%	11%	4%
Reduced IT expenditures	12%	6%	2%	11%	4%
Consolidated departments	9%	8%	7%	9%	4%
Lobbied for more funding from institutions	7%	6%	5%	5%	4%
Closed facilities	1%	3%	12%	2%	5%
Don't know/unsure	4%	0%	2%	3%	5%
Other	7%	11%	4%	3%	7%
No cuts/budget freezes over past year	22%	16%	40%	16%	15%

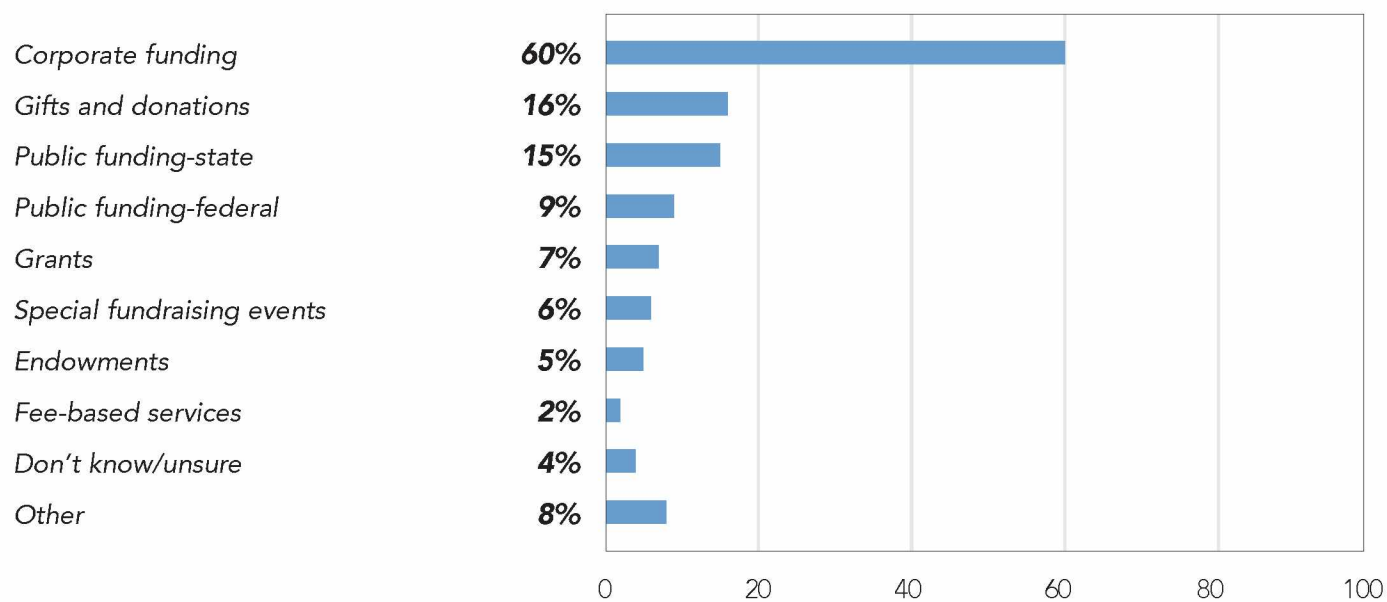
(Multiple responses permitted.)

Figure 7: Areas Seeing Increased Spending or Support in Special/Corporate/Foundation/Professional/Government Agency Libraries Over the Past Year

	2011	2012	2013	2015	2016
Online subscription acquisitions	26%	32%	26%	28%	46%
Digital content collections/services	12%	15%	17%	23%	24%
Ebooks	11%	17%	17%	17%	22%
Personnel	6%	20%	21%	11%	20%
Library technology equipment, software	8%	10%	14%	13%	15%
Book acquisitions	6%	7%	5%	2%	12%
Periodicals/serials acquisitions	5%	7%	5%	6%	12%
IT services	4%	5%	2%	8%	8%
Cloud-based solutions	1%	3%	2%	6%	5%
Library hours/availability	1%	2%	0%	6%	3%
Facilities upgrades/maintenance	3%	5%	0%	5%	2%
Operations	1%	2%	0%	2%	10%
Special career/business development programs	—	—	—	—	3%
Multimedia/streaming media	1%	2%	5%	3%	2%
Print subscription acquisitions	—	3%	2%	2%	5%
3D printing facilities	—	—	—	2%	0%
Don't know/unsure	8%	7%	2%	2%	7%
Other	5%	5%	4%	1%	6%
No areas seeing increased spending/support	44%	33%	40%	33%	—

(Multiple responses permitted.)

Figure 8: Primary Sources of Special/Corporate/Foundation/Professional/Government Agency Library Funding



(Multiple responses permitted.)

LIBRARY TECHNOLOGIES AND SERVICES: DIGITAL DOMINATES, LUKEWARM TOWARD CLOUD

The shift to digital media and content within special libraries continues unabated. Demand for electronic resources is rising, though there also has been more demand for print. Special libraries are seeing increasing demand for specialized, technical information, which helps define their mission.

Eight in 10 special library managers indicate that demand for electronic resources continues to rise—less than a year ago, but still at high levels. Interestingly, there has also been an increase in demand for print-based resources—21% report an upswing here, up from only 11% the year before. This is still below the 35% reporting additional print demand in the first survey of this series in 2011. (See Figure 9.)

In terms of specific types of offerings in demand, technical information tops this year's list, cited by 45% of special library managers. This is up from previous years, and demand for technical materials continues to climb. The use of special library facilities to gain web or wireless access is the second-ranked set of capabilities sought, though this is cited by fewer respondents. Thirty-seven percent also observe that patrons have been requesting ebooks. (See Figure 10.)

Spending on technology hardware, software, and related services remains steady, with 35% reporting increases in purchases. This is in line with previous years. Only 6% intend to scale back on their purchases. (See Figure 11.) Spending on online subscriptions, however, is soaring. Sixty percent report increased spending here, up from 56% a year ago and from 42% the year before that. More than half intend to boost spending on online subscriptions in the year ahead as well. (See Figure 12.)

There is lukewarm interest in tapping into cloud computing among special libraries, the survey finds. Only 25% either use cloud or plan to do so, down from 44% last year. The drop may be partially a statistical fluke (since there is a different mix of respondents each year), but the magnitude of the drop suggests that special libraries may have tried cloud services, and determined it did not fit the needs of their operations. (See Figure 13.) The most common usage is for basic infrastructure needs, such as storage. (See Figure 14.)

Online library catalogs—OPAC systems—dominate special libraries' technology infrastructures, as cited by 82%. Eight in 10 also maintain internet access, while half provide wireless access within their facilities. There has also been growth in link resolvers, discovery services, and ebook readers. (See Figure 15.)

Demand for discovery services at special libraries is on the rise, topping wish lists for the year ahead. One-third of library managers plan to purchase discovery services. Another 27% will be upgrading their internet services. One in four intends to purchase integrated library systems. (See Figure 16.) Close to one in four special libraries also engages patrons via social media services, including sharing library web pages and well-known public social media services such as Facebook. (See Figure 17.)

Figure 9: Change in Demand for Special/Corporate/Foundation/ Professional/Government Agency Library Print and Electronic Offerings Over the Past Year

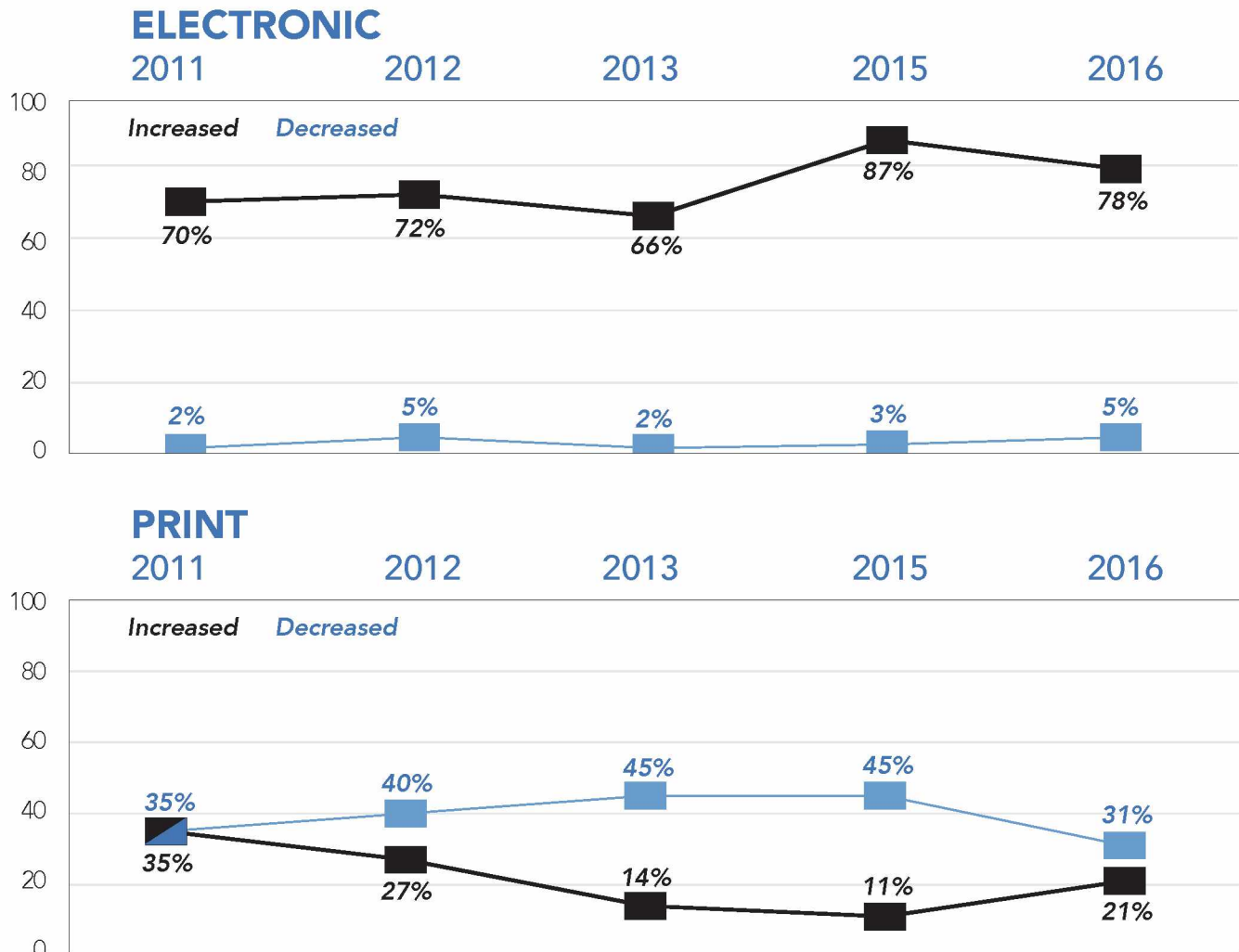


Figure 10: What Special/Corporate/Foundation/Professional/
Government Agency Library Users Have Been Requesting
Over the Past Year

	2011	2012	2013	2015	2016
Technical information/training	27%	31%	31%	37%	45%
Computer/web access	47%	49%	45%	53%	37%
Wireless access	30%	37%	45%	49%	37%
Ebooks	29%	34%	45%	41%	37%
Medical	28%	27%	35%	24%	31%
Primary/continuing education programs/requirements	13%	15%	7%	17%	13%
Support for online educ/MOOCs	—	—	13%	12%	13%
Streaming media	7%	13%	13%	9%	7%
3D printing/makerspaces or labs	—	—	2%	5%	4%
Audiobooks	10%	7%	0%	5%	6%
English language instruction	2%	1%	0%	4%	3%
Job search/career development information	6%	7%	9%	2%	7%
Computer games/simulations	2%	0%	2%	0%	3%
Don't know/unsure	11%	23%	9%	12%	10%
Other	10%	9%	7%	7%	15%

(Multiple responses permitted.)

Figure 11: Changes in Special/Corporate/Foundation/Professional/Government Agency Library Spending on Information Technology Hardware, Software and Related IT Services

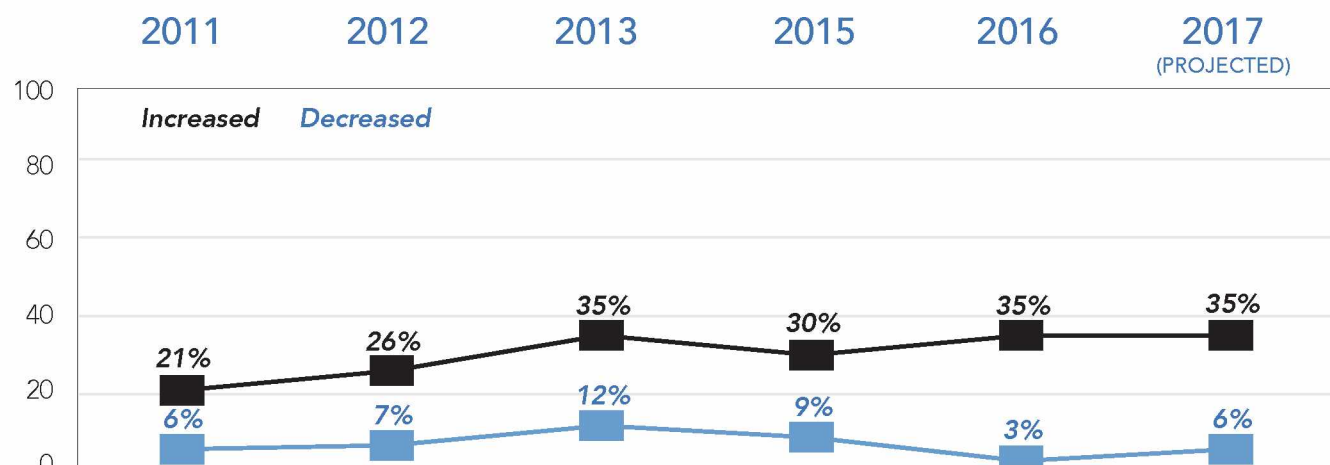


Figure 12: Changes in Special/Corporate/Foundation/Professional/Government Agency Library Spending on Online Subscriptions

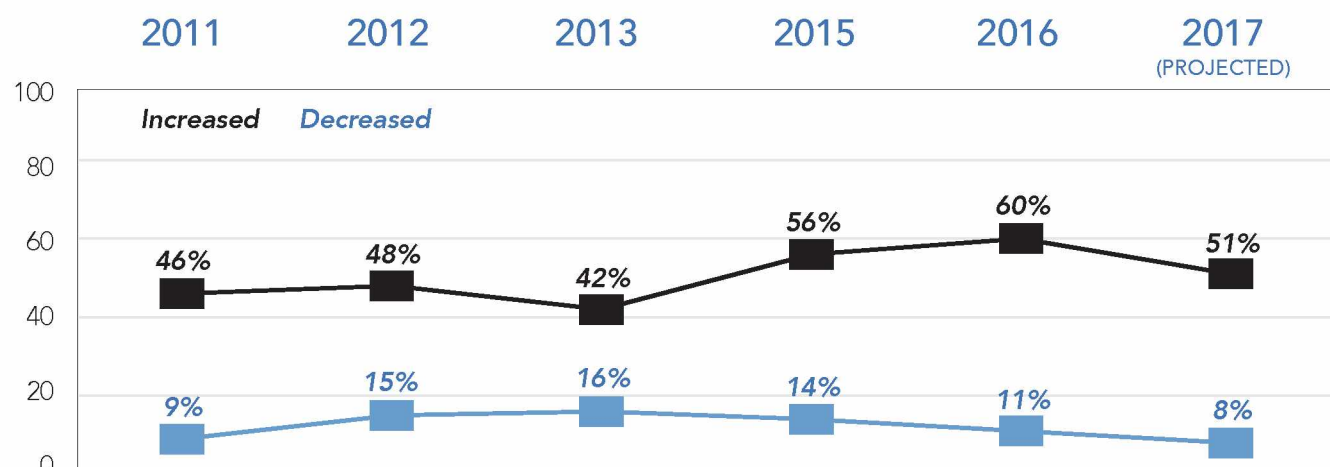


Figure 13: Access Cloud Computing Resources? (Special/Corporate/Foundation/Professional/Government Agency Libraries)

	2011	2012	2013	2015	2016
<i>Yes, currently use cloud resources</i>	3%	7%	17%	23%	15%
<i>Planning or considering cloud resources</i>	6%	14%	21%	21%	10%
<i>No</i>	62%	45%	38%	33%	50%
<i>Don't know/unsure</i>	29%	34%	23%	24%	25%

Figure 14: Cloud Computing Services Used or Planned for Use by Special/Corporate/Foundation/Professional/Government Agency Libraries

	2011	2012	2013	2015	2016
<i>IT infrastructure (online storage, processing)</i>	12%	16%	40%	34%	36%
<i>Communications (web conferencing, video, podcasting, email, collaboration)</i>	21%	22%	40%	40%	27%
<i>Specialized business applications (business, management, marketing, market research)</i>	5%	8%	20%	21%	12%
<i>Don't know/unsure</i>	0%	59%	43%	36%	45%
<i>Other</i>	5%	10%	3%	11%	9%

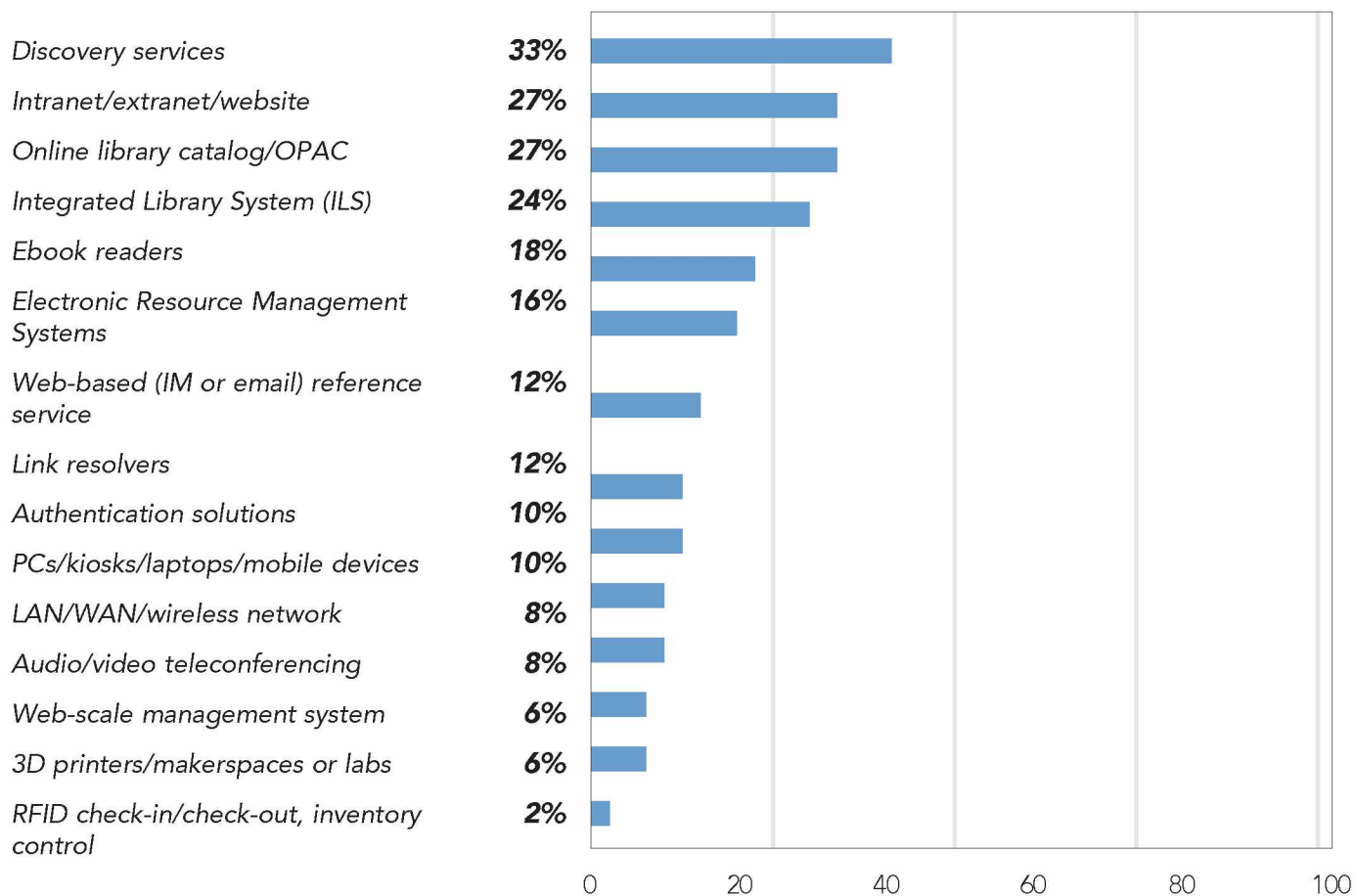
(Multiple responses permitted.)

Figure 15: Current Information Technology Tools and Platforms Used Within Special/Corporate/Foundation/Professional/Government Agency Libraries

	2011	2012	2013	2015	2016
Online library catalog/OPAC	82%	75%	71%	69%	82%
Intranet/extranet/website	72%	67%	73%	69%	79%
LAN/WAN/wireless network	49%	43%	51%	50%	50%
Integrated Library System (ILS)	42%	54%	39%	35%	48%
Web-based (IM or email) reference service	38%	51%	35%	45%	45%
PCs/kiosks/laptops/mobile devices	35%	42%	45%	36%	44%
Link resolvers	23%	29%	22%	22%	30%
Electronic Resource Management Systems	16%	22%	18%	24%	20%
Authentication solutions	21%	19%	16%	15%	20%
Discovery services	5%	6%	10%	11%	20%
Ebook readers	7%	7%	8%	9%	18%
Audio/video teleconferencing	17%	20%	35%	20%	17%
Web-scale management system	—	—	10%	7%	9%
RFID check-in/check-out, inventory control	6%	10%	6%	7%	6%
Other	6%	11%	4%	2%	1%

(Multiple responses permitted.)

Figure 16: Information Technology Tools and Platforms to Be Purchased by Special/Corporate/Foundation/Professional/Government Agency Libraries in the Year Ahead



(Multiple responses permitted.)

Figure 17: Social Networking Services in Use at Special/Corporate/Foundation/Professional/Government Agency Libraries

	2011	2012	2013	2015	2016
<i>Sharing library web pages and subject guides (e.g., LibGuides)</i>	20%	30%	22%	22%	23%
<i>Social networking (e.g., Facebook, LinkedIn)</i>	26%	31%	27%	27%	20%
<i>Wikis or blogs</i>	31%	31%	27%	21%	20%
<i>Document-sharing web apps</i>	12%	22%	18%	18%	15%
<i>Patron reviews, ratings</i>	9%	16%	22%	10%	12%
<i>Tagging and rating</i>	7%	17%	16%	10%	11%
<i>Audio or video podcasts</i>	15%	16%	12%	10%	9%
<i>Photo or video-sharing web apps</i>	4%	8%	4%	6%	6%
<i>Don't know/unsure</i>	22%	17%	24%	17%	25%
<i>Other</i>	1%	4%	4%	1%	1%
<i>Don't offer social networking tools/opportunities</i>	32%	30%	22%	27%	32%

(Multiple responses permitted.)

LIBRARY STRATEGIES: GOING DEEPER WITH DIGITAL

Special library managers are increasingly focusing on building their digital service offerings, and this is likely to continue into the foreseeable future. While being more responsive to their customers, few see the need for libraries to operate in a manner more similar to businesses.

For special library managers, the priority continues to be on opening up access to patrons, and providing as many online resources as possible. This has been a leading priority in the 5 years this survey has been conducted. Customer service has also risen to the top, with a majority planning to focus greater efforts on improving their service levels. Close to half also intend to be marketing their services more broadly. In line with the leading request from patrons—greater technical information—47% also intend to keep focusing on providing tools for digital access, as well as training or education to go with it. (See Figure 18.)

Budgetary concerns remain top of mind for special library managers this year, with 76% indicating that maintaining their

levels of service with tight budgets is likely to continue as their greatest challenge. The rapidly changing information technology space is also seen as a challenge by a majority. (See Figure 19.)

Strategic planning and return on investment analysis are key business strategies that some libraries have undertaken to improve their financial picture. While close to half of special libraries have strategic plans or are developing such plans, there has been no appreciable growth in this capability, the survey finds. (See Figure 20.) Measuring return on investment is another key activity for enhancing the business side of library management. However, within the special library sector, fewer than one in four conducts ROI analysis. (See Figure 21.)

Figure 18: Special/Corporate/Foundation/Professional/Government Agency Libraries' Priorities for the Coming Year

	2011	2012	2013	2015	2016
<i>Increase availability of online pubs/digital access</i>	55%	55%	62%	67%	57%
<i>Improve/expand customer service</i>	41%	58%	42%	37%	54%
<i>Identify and reach out to new groups of patrons</i>	38%	42%	40%	37%	47%
<i>Provide assistance/education on information access tools/services</i>	47%	58%	38%	45%	47%
<i>Enhance discovery of collections</i>	38%	35%	27%	29%	46%
<i>Drive usage of current resources</i>	44%	41%	42%	39%	44%
<i>Repurpose physical space</i>	23%	30%	27%	28%	35%
<i>Join or increase participation in consortium/network</i>	20%	17%	19%	16%	22%
<i>Develop unique library collections</i>	21%	27%	13%	22%	26%
<i>Enhance user workflow tools</i>	12%	20%	18%	23%	24%
<i>Institute special programs for constituents/patrons</i>	15%	20%	14%	17%	14%
<i>Expand/upgrade facilities</i>	12%	18%	15%	16%	8%
<i>Provide support for online education/massive open online courses</i>	—	—	9%	7%	13%
<i>Don't know/unsure</i>	5%	3%	5%	8%	4%
<i>Other</i>	3%	8%	1%	1%	12%

(Multiple responses permitted.)

Figure 19: Special/Corporate/Foundation/Professional/Government Agency Libraries' Challenges Over the Next 5 Years

	2011	2012	2013	2015	2016
<i>Maintaining services with tight budgets</i>	81%	77%	73%	80%	76%
<i>Keeping up with changes in information technology</i>	55%	55%	64%	46%	57%
<i>Migrating print content to digital formats</i>	35%	44%	36%	38%	42%
<i>Identifying new sources of funding</i>	36%	31%	15%	32%	21%
<i>Keeping facilities open/at preferred operational levels</i>	24%	17%	22%	31%	25%
<i>Competing/keeping up with public online services/offersings</i>	19%	21%	14%	18%	27%
<i>Finding and retaining knowledgeable staff</i>	24%	24%	16%	17%	25%
<i>Other</i>	5%	9%	10%	3%	12%

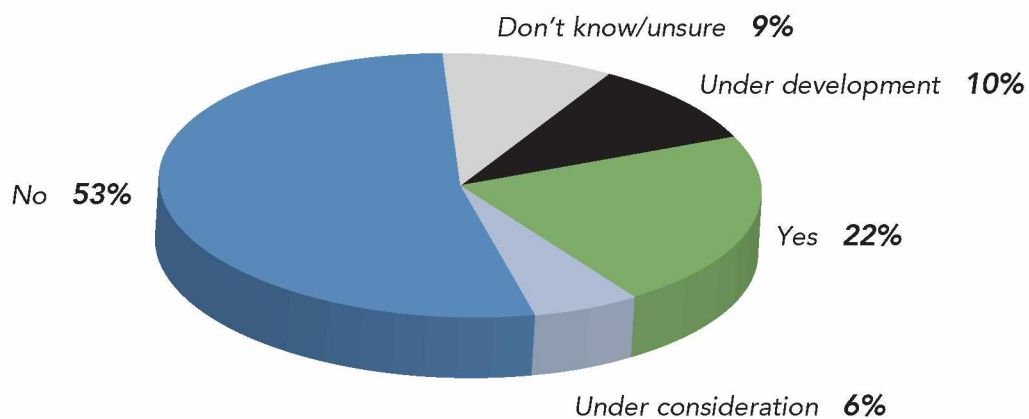
(Multiple responses permitted.)

Figure 20: Special/Corporate/Foundation/Professional/Government Agency Library—Have Strategic Plan?

	2011	2012	2013	2015	2016
<i>Yes</i>	18%	21%	19%	33%	21%
<i>Under development</i>	32%	31%	30%	22%	24%
<i>Under consideration</i>	11%	21%	9%	16%	15%
<i>No</i>	35%	23%	36%	26%	36%
<i>Don't know/unsure</i>	5%	4%	6%	4%	4%

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

Figure 20: Special/Corporate/Foundation/Professional/Government Agency Library—Measure Return on Investment?



DEMOGRAPHICS

Figure 22: Respondents' Titles

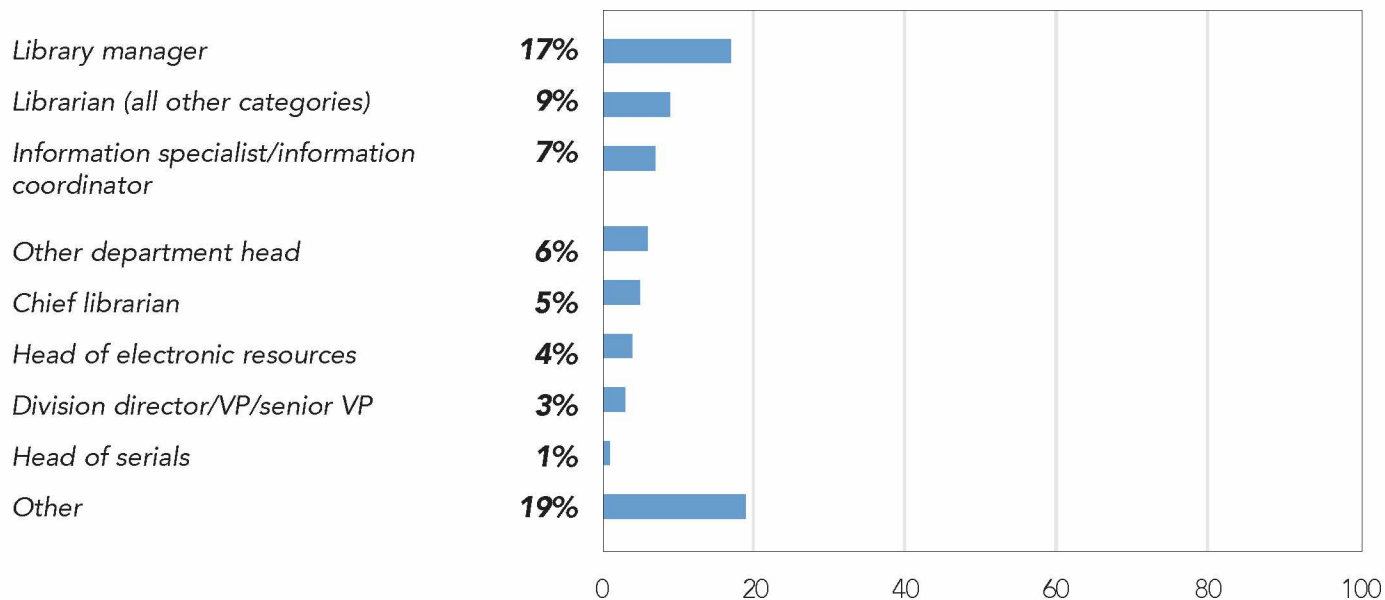


Figure 23: Size of Population Served

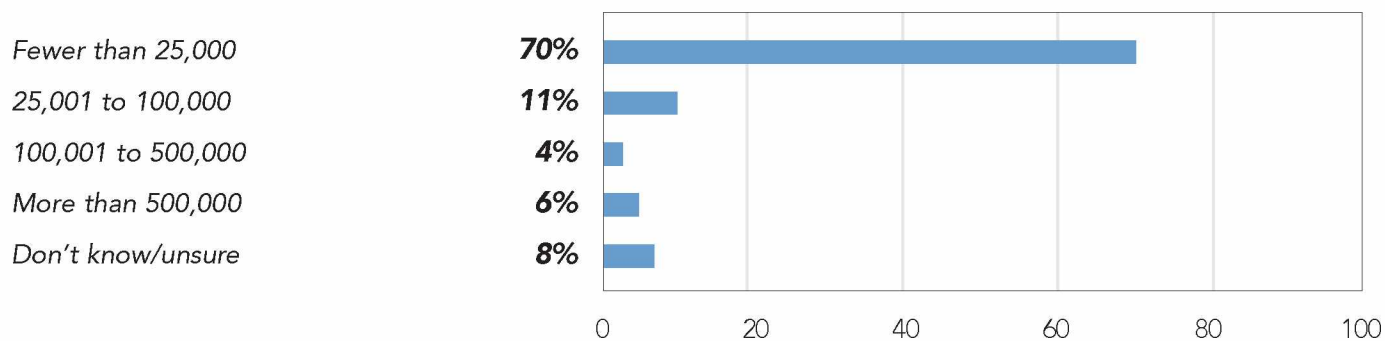


Figure 25: Types of Library Infrastructures Surveyed

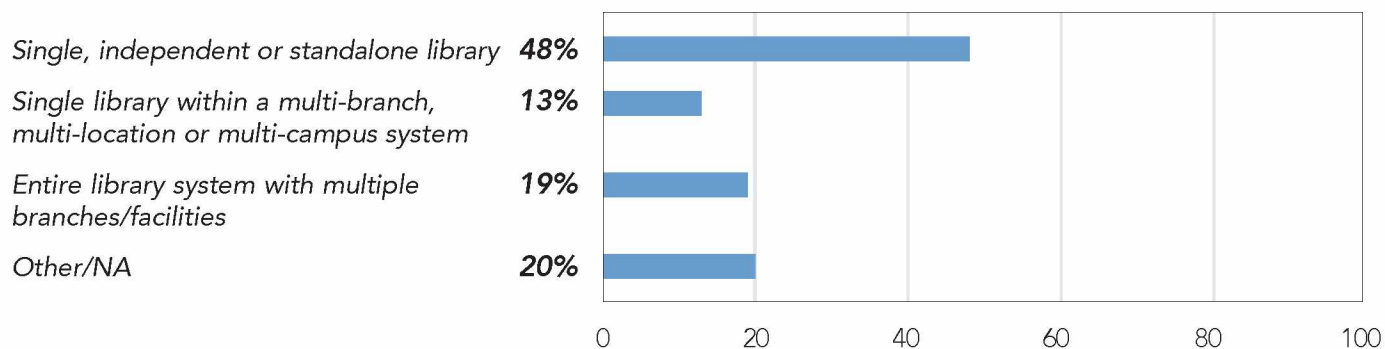
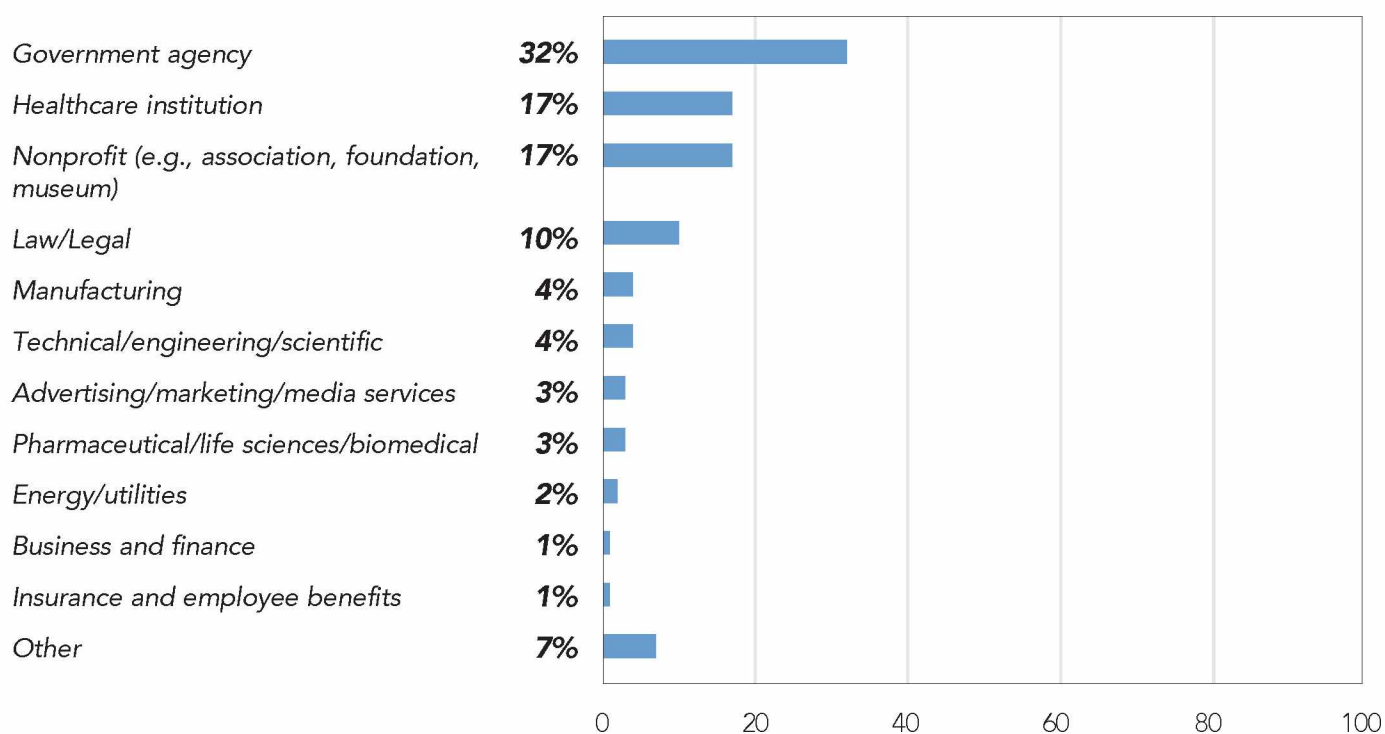


Figure 26: Type of Library Surveyed



ACKNOWLEDGEMENTS

“Libraries Achieve Equilibrium Between Digital and Print as Budgets Advance: The Library Resource Guide Benchmark Study on 2016 Special, Corporate, Professional, and Government Agency Library Spending Plans,” was produced

by Unisphere Research. Unisphere Research is a division of Information Today, Inc. Unisphere Media, 121 Chanlon Road, New Providence, NJ 07974; 908-795-3702. www.infotoday.com

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 in the September–November 2015 time period. A total of 827 valid responses were gathered. This report is based on the responses of 120 respondents with special libraries.

ABOUT THE RESEARCHERS

LRG’s “Benchmark Study on Library Spending” was conducted by Unisphere Research, the research arm of Information Today, Inc. Since 2004, Unisphere has completed more than 125 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, EMC, SAP, Symantec, Teradata, Informatica, VMware, Tableau Software, Mark Logic, 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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