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Ithaka S+R Library Survey 2010:

Insights from U.S. Academic Library Directors

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Executive Summary

The Ithaka S+R Library Survey of academic library directors in the United States was conducted in fall 2010. Our aim was to learn about the strategic direction library administrators are planning for their organizations as well as their views on service offerings and collections. This report of findings is intended to give the library community a better sense of important trends and help senior leaders benchmark their plans against their peer institutions.

Two hundred sixty-seven high-level library administrators at four-year colleges and universities completed the survey. The survey did not include community colleges. Findings indicate that academic library leaders have developed consensus on certain key strategic directions, such as the purchasing and management of journal collections and the prioritization of support for instruction and learning; however, on other topics, there are broad divergences that suggest strategy has yet to come into focus. In addition, there are some important divergences—as well as many consistencies—between the priorities of library directors, as expressed in this survey, and attitudes of faculty members as expressed in the Ithaka S+R Faculty Survey 2009.

Key Findings

On strategy and leadership:

- Most respondents do not think their libraries have conducted sufficient strategic planning to meet user needs for services and optimally manage collections. Thirty-five percent of respondents agreed with this statement, “My library has a well-developed strategy to meet changing user needs and research habits.” Slightly less than half said they have all the information they need to make informed decisions about when to deaccession print journals to which they have access digitally.
- Library directors envision a high-level strategic prioritization of their research and teaching support and facilitation functions (expected to be important to more than 90% of respondents in five years) in conjunction with a shift away, in some cases, from collections acquisitions and preservation functions (expected to shrink so they are important to 80% or less of respondents in five years).
- There are a number of important divergences between high-level strategies on the one hand and budget priorities on the other, suggesting that library directors are in some cases not able to fully execute the strategic direction they have in mind for their libraries.

On service offerings:

- Library directors at all types of institutions see supporting teaching and learning as one of their primary missions: 94% of respondents said that they see teaching information literacy skills to undergraduates as a very important role for their libraries. They would also like to work more closely with faculty members on supporting classroom instruction. However, a notably smaller share of faculty members values the library for its teaching

support role, raising questions about how the library best works within an institutional context to pursue this role.

- Library directors believe that it is strategically important that their libraries be seen by users as the principal starting point in the discovery process. While they recognize that faculty members and students increasingly rely on resources outside the library for discovery of information and content, they would like to invest more in discovery tools to aid users.

On collections:

- The library's role as a buyer of materials remains of primary importance, both in terms of how library directors prioritize their spending and how faculty members view the library. Electronic journals are a significant budget priority for many, and respondents envision a continued gradual rise in the amount that they spend on digital materials and commensurate reduction in expenditures for print materials. They expect in five years to essentially complete the transition to electronic format for journals acquisitions and at that point spend nearly half their books budget on electronic books.
- Most libraries have become comfortable with deaccessioning or moving offsite their print journal collections after they have reliable digital access to copies of these materials: 91% have already done so or are planning to do so in the future. This is not the case for books, at least not yet. However, a significant portion of respondents would be willing to consider deaccessioning or moving offsite their print books collections if the proper preservation and access infrastructure is put in place.

I. Introduction and Methodology

Introduction

Many studies have tried to re-imagine the future of the academic library and define a set of services that will secure its position at the center of scholarship and research. User needs and library collections are both changing rapidly, and librarians face increasing pressure to demonstrate how they will adjust to these changes and continue to demonstrate their value to colleges and universities. Paul Courant has written of the academic library's future: "One of our institutional imperatives is to make plain its value. If we fail, we are at risk for losing access to our own history."¹ The purpose of the Ithaka S+R Library Survey is to provide data that will focus these questions about the future of the library. We hope to provide libraries and their parent institutions with information on the library community's broad strategic directions, capturing areas of consensus while highlighting areas where additional debate appears to be ongoing.

Despite the broad proliferation of literature about the changing role of the library, there is still a great deal of apprehension about the future. Many library directors who responded to the survey expressed ambivalence about their libraries' strategic plans for meeting the needs of their communities. This echoes many of the widely discussed fears that academic libraries are becoming less and less relevant to users. The OCLC report *Research Libraries, Risk, and Systemic Change* identified risks to the library on several fronts: new resources will erode the traditional value of the library, the library might not adapt to these changes, and even if libraries come to occupy a new and valuable role, librarians might not effectively be able to communicate this role to users.² The Ithaka S+R Library Survey was meant to assess how library directors are addressing changing user needs and how they are putting new strategies in place at their institutions.

Our findings confirm a number of perceived trends in how libraries manage their collections and prioritize services. In the area of collections management, libraries are increasingly willing to replace print collections with digital ones, or to substitute digital purchases for print purchases. A decreasing emphasis on developing and maintaining print collections is matched by a correspondingly strong emphasis on the support of campus teaching and learning. Even so, there are areas of profound divergence among directors in their responses on key strategic questions, and other priorities on which directors and faculty members diverge. The Ithaka S+R Library Survey 2010 suggests just how much is in flux in the academic library landscape broadly, while also pointing to important areas of growing strategic clarity.

¹ Paul N. Courant, "Scholarship and Academic Libraries (and their kin) in the World of Google," *First Monday*, 11:8 (2006).

² James Michalko, Constance Malpas, Arnold Arcolio, *Research Libraries, Risk, and Systemic Change*, (Dublin, Ohio: OCLC Research, 2010), 9.

Methodology

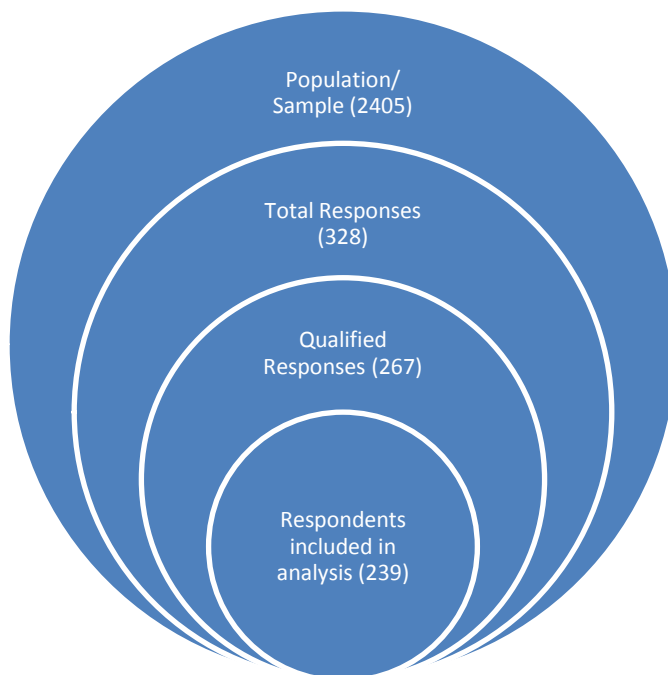
The survey questionnaire was mailed electronically to library directors at four-year colleges and universities (not including community colleges) in the United States that are part of one of the following nine Carnegie Classifications:

1. Research Universities (very high research activity)
2. Research Universities (high research activity)
3. Doctoral/Research Universities
4. Master's Colleges and Universities (larger programs)
5. Master's Colleges and Universities (medium programs)
6. Master's Colleges and Universities (smaller programs)
7. Baccalaureate Colleges (arts & sciences)
8. Baccalaureate Colleges (diverse fields)
9. Baccalaureate/Associate's Colleges

To reach the broadest possible audience, we obtained our sample of contact data from a commercial mailing list vendor. This vendor includes directors of school and departmental libraries in its database of academic library directors. We used the entire population provided by this vendor as our sample and therefore sent the survey to all 2,405 contacts provided on November 11, 2010, with a reminder email sent on November 30, 2010. The invitation letter identified Ithaka S+R as the source of the survey. On a strictly optional basis, we collected identifying information for those interested in participating in a pre-release webinar, which was the sole benefit of participation. We committed to ensuring the confidentiality of all responses.

At the response cut-off date of December 2, 2010, we had received a total of 328 responses to the survey. Survey respondents self-identified their position at their institution, and while most survey respondents were library directors, there were also some respondents who held other positions in their libraries. We included the data from the 28 respondents who were directors of branch libraries and the 40 respondents who were associate university librarians (or held other comparable positions), but we removed data from all other sources. The qualified responses therefore came to 267, for a response rate of 11%. For the purposes of the analysis presented in this report, we have excluded library director and associate director respondents from school and departmental libraries to focus exclusively on the 239 main campus library directors or associate directors.³

Figure 1: Survey Population



The analysis presented below breaks down responses by institutional size classification, grouping three Carnegie classifications into the “doctoral universities” category, three into the “master’s colleges and universities” category, and three into the “baccalaureate colleges” category. Of the 239 institutions included in the analysis, 79 are doctoral institutions, 66 are master’s institutions, and 94 are baccalaureate institutions.

³ The total population of this group (based on the number of institutions in the Carnegie classifications that we used) is 1,830. We cannot be sure what percentage of this group was included in our vendor’s sample, but we assume there was at least some error and it did not capture all 1,830 main campus library directors. Assuming that we reached all 1,830 institutions, our response rate among this population was at least 13.1%, but this is probably a low estimate.

This report does not include a complete account of the data from the survey, but rather a characterization of the key themes of the responses. The complete dataset, which will be stripped of the optional identifying information, will be offered for deposit with ICPSR later this year.

II. Strategy and Leadership

Academic libraries are in part defined by the array of services that they provide to their users and the collections they build, maintain, and preserve for them. On a single campus there can be a multiplicity of different types of users, so libraries are challenged to assess user needs, balance today's users against anticipated future needs, develop appropriate services for groups of users, and appropriately balance commitments of library resources.

The survey questionnaire was designed to be in dialogue with the previous research directions of the library community. Thought leaders and researchers from within the library community have issued a variety of proposals for the future of the academic library. David Lewis recommended that libraries make a strategic move away from a purchasing role towards a curatorial role. An important part of his approach is shifting resources (in terms of space, money, and staff resources) away from managing legacy collections and towards serving user needs; Lewis urges libraries to "reposition library and information tools, resources, and expertise so that they are embedded into the teaching, learning, and research enterprises."⁴ Other researchers have considered the future of library services from the user's perspective. The recent report *Assessing the Future Landscape of Scholarly Communication* uses a disciplinary framework to examine how researchers in various disciplines discover, use, and share content.⁵ This study focused largely on the need for many disciplines to reevaluate their publication and peer review models, but it also identified a general need for increased support for new research technologies like GIS, visualization, and complex distributed databases. Ithaka S+R's Faculty Survey 2009 offered another user-based perspective of the academic library.⁶ As the fourth in a series of faculty studies over the course of a decade, this program has gathered data about researchers' declining reliance on the library as a gateway to scholarly information and resources. Another approach to understanding users has been to study them from an anthropological perspective. The University of Rochester developed a major program to study faculty member and student needs, and the library worked with an anthropologist to examine behaviors and attitudes in direct support of its strategic planning.⁷

⁴ David W. Lewis, "A Strategy for Academic Libraries in the First Quarter of the 21st Century," *College & Research Libraries* 68 (5):418-434 (September 2007).

⁵ Diane Harley et. al., *Assessing the Future Landscapes of Scholarly Communication: An Exploration of Faculty Values and Needs in Seven Disciplines*, (Berkeley: Center for Studies in Higher Education, UC Berkeley, 2010).

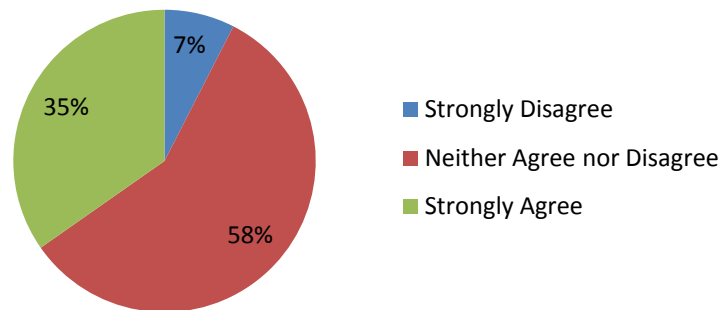
⁶ Roger Schonfeld and Ross Housewright, *Faculty Survey 2009: Insights for Libraries, Publishers, and Societies*, Ithaka S+R, April 2007.

⁷ Nancy Fried Foster and Susan Gibbons, *Studying Students: The Undergraduate Research Project at the University of Rochester* (Chicago: Association of College and Research Libraries, 2007). A group of academic libraries in Illinois have recently released preliminary findings from ERIAL, a similar anthropological exploration of student information needs and practices, as described in Jennifer Howard, "Overdue at the Library: Good Guides on How to Use It," *The Chronicle of Higher Education*, June 29, 2010, sec. Libraries, <http://chronicle.com/article/Overdue-at-the-Library-Good/66086/>.

This is only a sampling of the broad and varied literature about the future of library strategy and services. While much of this research has raised a sense of urgency about creating strategies for the future, not all of it has yielded recommendations that libraries can put into practice or standards that they can measure their priorities against. Library leaders are still unsure of how to best address user needs. As Figure 2 indicates, we found that 35% of respondents (and only 18% of those at baccalaureate institutions) agreed with the statement: “My library has a well-developed strategy to meet changing user needs and research habits.”⁸ The Ithaka S+R Library Survey was meant to develop a high-level view of how library services and strategies for meeting user needs are evolving at different libraries.

Figure 2: User Needs Strategy

My library has a well-developed strategy to meet changing user needs and research habits.



We used several types of questions to assess how academic libraries value the different roles that they play. The first approach was to describe a set of six high-level functions that capture an array of the services that an academic library provides. Ithaka S+R has asked versions of the same question of faculty in the Ithaka S+R Faculty Surveys that were conducted in 2003, 2006, and 2009, and the data from those surveys provides a point of comparison. We also asked respondents about budget and staffing priorities, to gauge libraries’ immediate plans and how these relate to stated high-level strategy.

A number of key themes emerged from the survey data. First, the library directors who responded have prioritized teaching and learning, and they see their libraries as an integral part of an undergraduate education. Most have identified supporting undergraduate information literacy as the primary role of their libraries. Second, directors think that supporting the discovery of content is an important facet of their interaction with users, but they are still unsure of the role it should play in their strategic planning and resource allocation.

⁸ Only 7.5% of respondents disagreed with this statement, indicating a lack strong opinion in either direction.

What Is the Role of the Library?

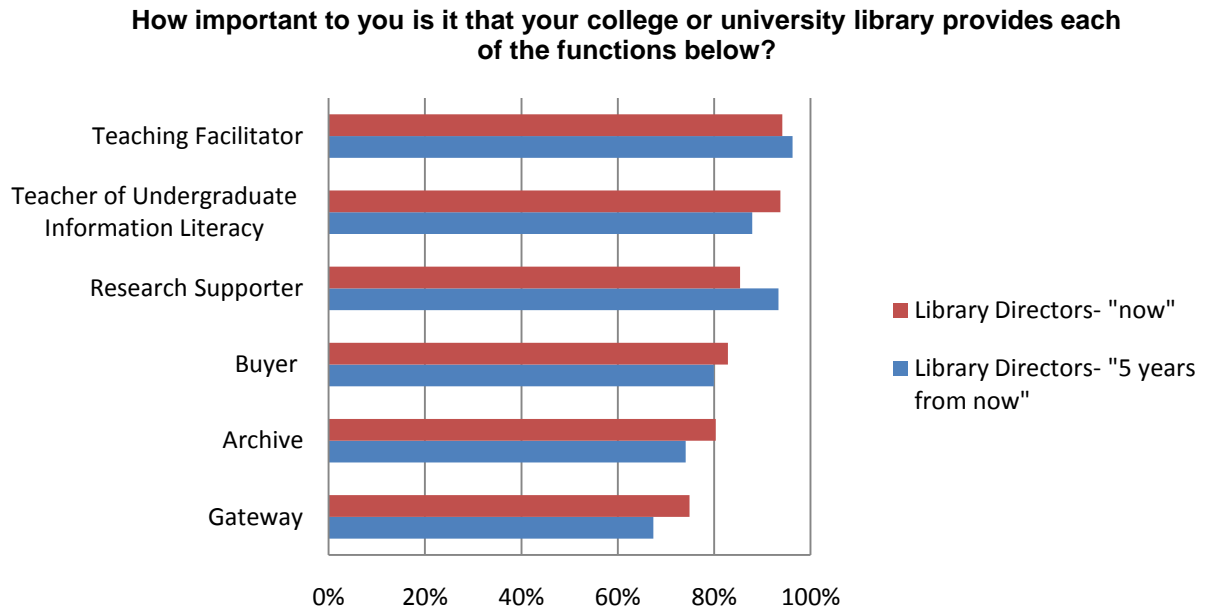
For broad functional comparison, we asked, “How important to you is it that your college or university library provides each of the functions below?” On a scale of 1 to 6, they rated the importance of six functions of the library:

- “The library supports and facilitates faculty teaching activities” (which we term “teaching facilitator”);
- “The library helps undergraduates develop research and information literacy skills” (“teacher of undergraduate information literacy”);
- “The library provides active support that helps increase the productivity of faculty research and scholarship” (“research supporter”);
- “The library pays for resources faculty members need, from academic journals to books to electronic databases” (“buyer”);
- “The library serves as a repository of resources; in other words, it archives, preserves, and keeps track of resources” (“archive”); and
- “The library serves as a starting point or ‘gateway’ for locating information for faculty research” (“gateway”).

Library directors broadly prioritize research and teaching support functions over traditional collections, preservation, and discovery functions. Still, over three-quarters of respondents view each of these functions as an important priority for their institution. Figure 3 indicates that teaching and learning functions topped out all the others, with a near consensus on teaching support and supporting undergraduate information literacy.

We also asked how important each of these roles will be in five years' time. Two functions are perceived as becoming more broadly important: research support and teaching facilitation (but not information literacy), as Figure 3 indicates.

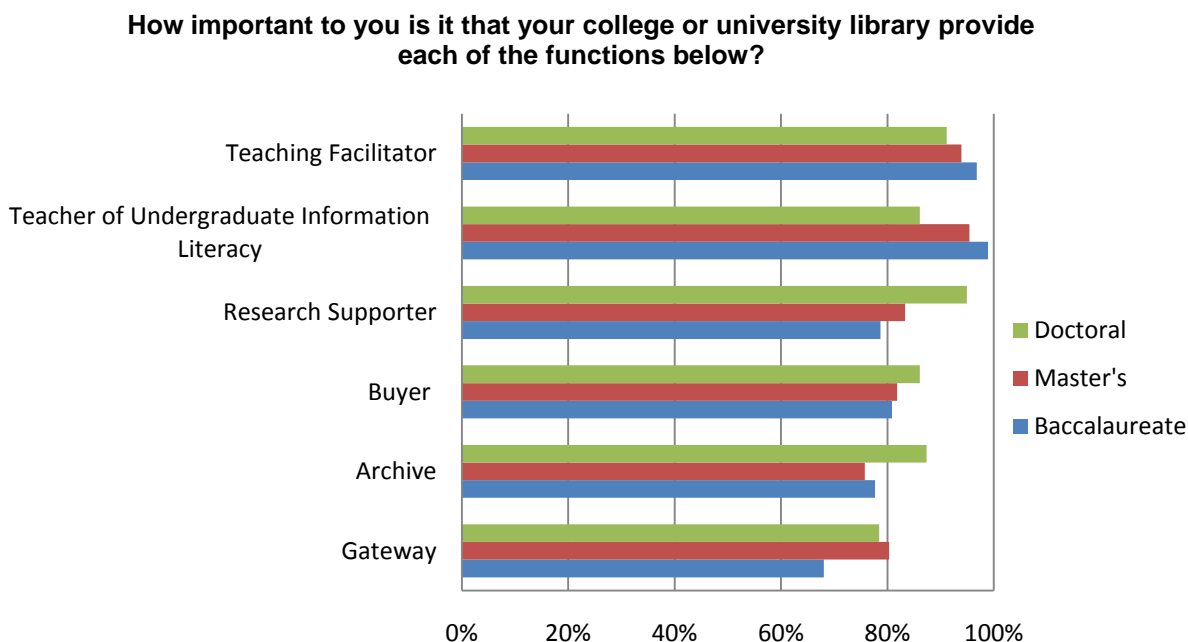
Figure 3: Roles of the Library



Percentage answering 5 or 6 on a scale of 1 to 6, where 6 represents "very important" and 1 represents "not at all important."

Even at doctoral institutions, supporting teaching was second only to supporting faculty scholarship (see Figure 4). The user-facing functions of the library ranked higher than collections development and maintenance, and respondents predicted that research and teaching support will only grow in importance over the next five years. Baccalaureate and master's institutions generally placed more emphasis on teaching, while doctoral universities place more emphasis on faculty research. This can be observed in the 'staircase' effect in the top three values in Figure 4.

Figure 4: Library Roles by Institution Type



Percentage answering 5 or 6 on a scale of 1 to 6, where 6 represents "very important" and 1 represents "not at all important."

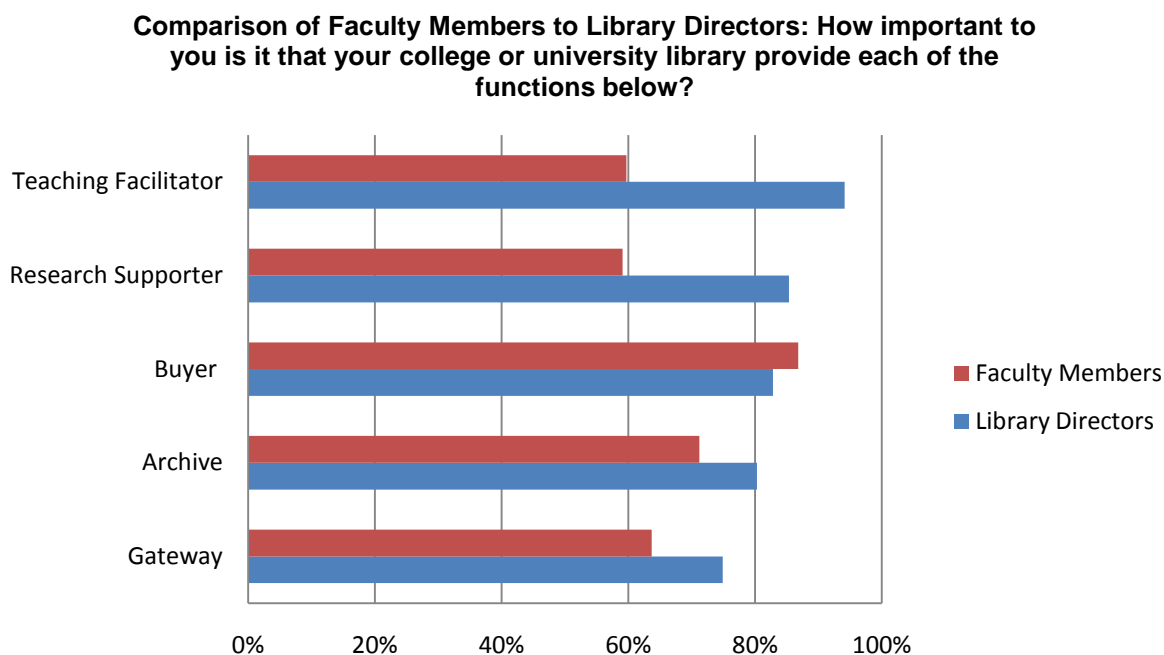
Within the library community, there is a strong focus on undergraduates as a key constituency for library services. Later in this report (beginning on page 21), we will examine some of the efforts to measure the pedagogical value of campus libraries, and we will also examine how they are realigning their portfolio of services to meet the needs of students.

This increasing focus on education does not mean that libraries have given up their other functions. Although the comparisons between the estimated importance of the "archive" and "buyer" roles now and five years from now reveal a slight decline in their relative importance to library leadership, a large majority of respondents still see these as important parts of their libraries' work.

When we compare the responses of library directors with data from the Ithaka S+R Faculty Survey 2009, we see that the two groups appear to have significantly different ways of thinking about the role of the library within the larger institution.⁹

The different profiles that emerge through these data are striking: on one hand, faculty respondents place strong value in the traditional functions of the library as an institution that collects and maintains collections for research, while library directors focus more on the services that they provide to users, including students, teachers, and researchers. Library directors predict user-facing values, specifically research and teaching support, will become more important in the next five years. Significantly, a smaller share of the faculty members supported the library directors' strong appreciation for the library's role in teaching and learning. We do not have trendline data for these services roles, as they are new to the 2009 and 2010 surveys. Through future surveys, we hope to learn whether the teaching and research support roles will change in perceived importance among faculty members.

Figure 5 Library Roles: Comparison with Faculty



Percentage answering 5 or 6 on a scale of 1 to 6, where 6 represents "very important" and 1 represents "not important at all."

As might be expected, library directors generally assigned higher value to the functions of the library; all roles of the library had over 75% of all library directors reporting that they were very important. The only instance in which a role was of equal or greater importance among faculty than among libraries was in the case of the library's function as a buyer of materials. Moreover,

⁹ Note that the "undergraduate information literacy" option is newly introduced with this survey and was not offered in the Faculty Survey 2009, so there is no basis for comparison on this response.

as described below, library directors' budget priorities are largely lined up with the needs of faculty members—purchasing materials ranked highly among areas for new investment. This suggests that library directors are in tune with faculty members' desire for more materials, even if these fall in different places in a ranking of important library activities.

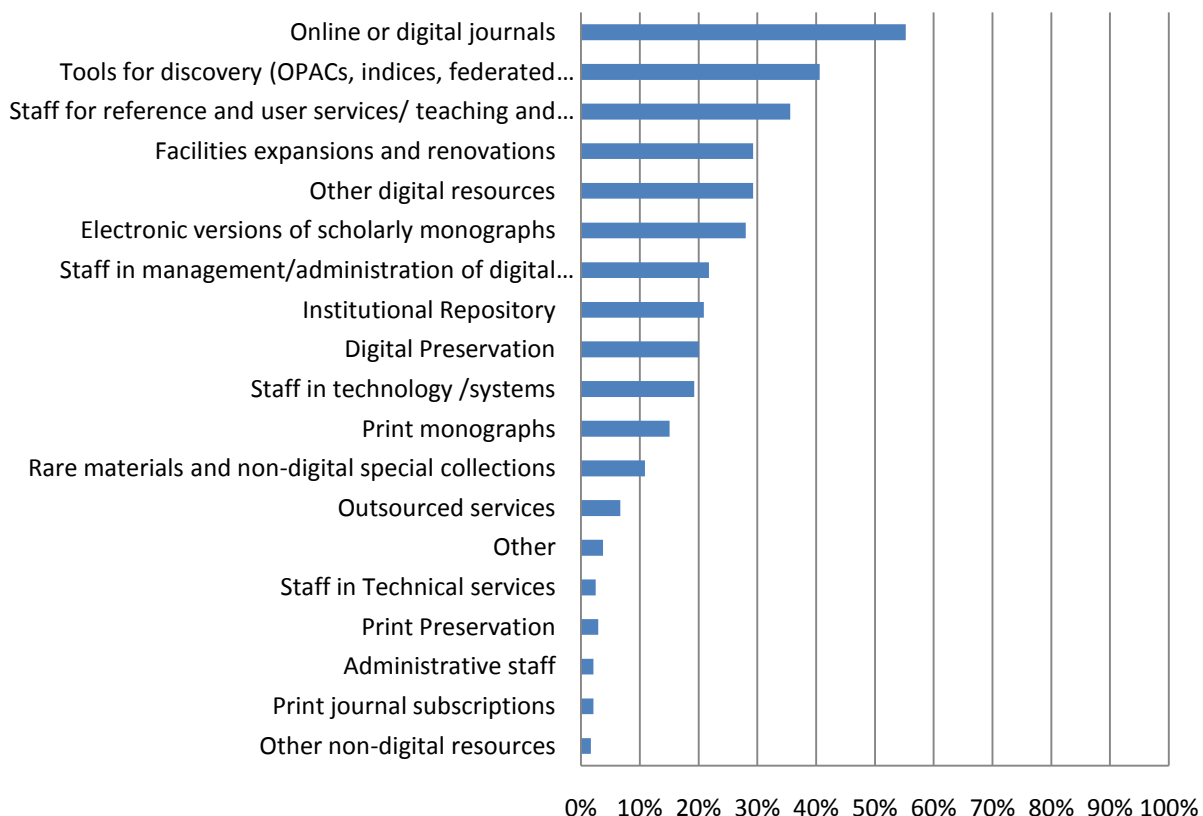
What Are Library Budget Priorities?

In order to gauge immediate spending priorities, we asked respondents how they would spend an unexpected 10% budget increase; they selected up to three areas (from a list of possible options) in which they would invest the money, with findings illustrated in Figure 6.¹⁰ The most overwhelming response was in the area of online or digital journals; 55% of respondents said that they would invest more money in this area. This was in stark contrast to the 2% who said that they would like to buy more print journal subscriptions. The fifth and sixth priorities—"other digital resources" and "electronic versions of scholarly monographs"—were also related to licensing or purchasing online materials. Other key areas included "tools for discovery (OPACs, indices, federated search, etc.)" with 41%, "staff for reference and user services/teaching and learning" with 36%, and "facilities expansions and renovations" with 29%.

¹⁰ The online survey tool permitted respondents to select more than 3 responses to this question. Thus, the response rate sums to 348%, when it should sum to 300%. While some respondents are in effect "overrepresented," this question still gives a good sketch of budget priorities at academic libraries.

Figure 6: Budget Priorities

If you received a 10% increase in your library's budget next year in addition to the funds you already expect to receive, in which of the following areas would you allocate the money? Please check up to three areas in the following list that you would invest in.



In our interpretation of the data, we identified several areas where academic libraries' budget priorities did not seem to match their high-level strategies discussed above. The first of these areas was the library's role as a buyer of materials. While this ranked as the fourth most important role, respondents' top spending priority as to obtain access to more digital journals, and three of the top six areas for investment were collections-related. It is unclear whether this is just a rhetorical issue or whether it points to a more fundamental strategic divergence that should receive further examination.

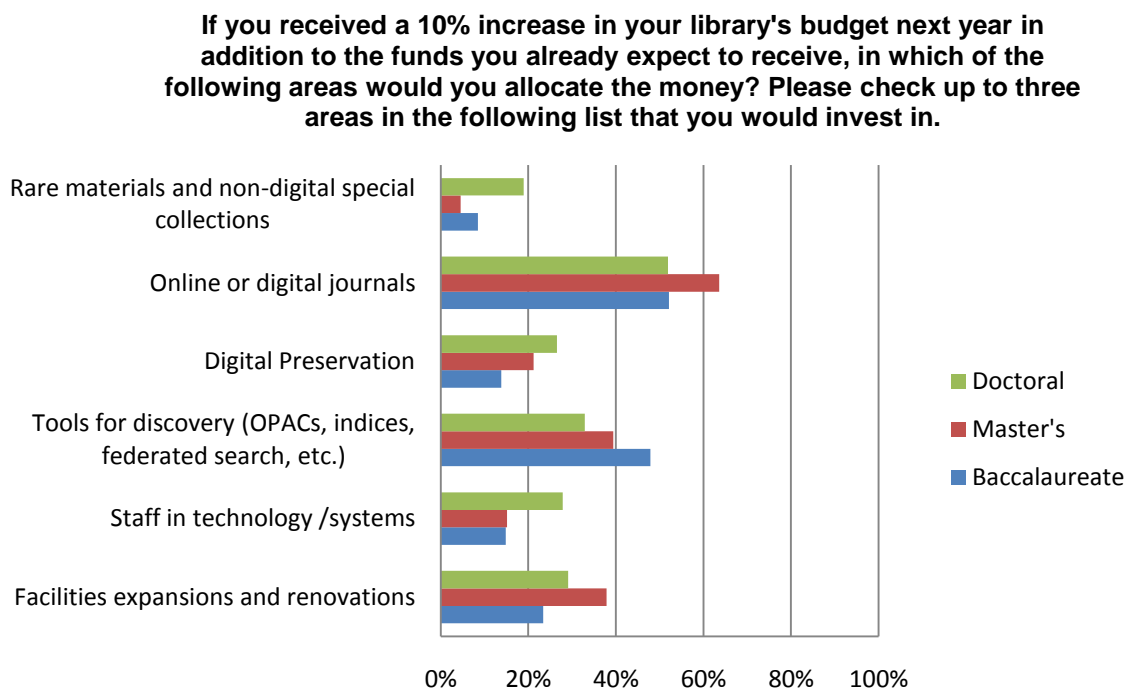
Similarly, a substantial proportion (41%) of library directors would like to invest more money in tools for discovery, but fewer respondents rated the "gateway" role of the library as important than they did any other role. We will cover these and other divergences in responses around the discovery / gateway role at greater length below (beginning on page 23).

Library directors identified services roles as most important, yet "Staff for reference and user services / teaching and research support" was the third most popular category for increased

spending.¹¹ Perhaps they feel well enough staffed to support these functional priorities, or perhaps they see other resources beyond staff as important for provision of such services.

There were some key differences in budget priorities among different types of institutions, as illustrated in Figure 7, though it is worth noting that the top three priorities remained the same (and in the same order) at all sizes of institutions. Respondents from doctoral universities showed a stronger interest in investing in digital preservation and in staff in technology and systems. They were slightly more interested in allocating more money to staff for reference, user services, teaching, and research support (42% selected this option compared with 36% overall). Although these institutions are much more likely to build special collections, only 19% would prioritize investing more money in this area now. This number may be low because of the current economic climate, or it may reflect a tendency to rely on special gifts and not regular budget funds to support these collections, but it might also call into question the assumption that larger academic libraries look to special collections as a key strategy in providing unique value to users.

Figure 7: Budget Priorities by Institution Type



The data suggest that libraries at master's institutions do not feel they currently have the appropriate resources in digital journals or in facilities. The priority that they placed on these

¹¹ Teaching might have garnered more enthusiasm if the question had been designed differently. As it was worded, there was only one option that allowed respondents to express a desire to invest in teaching staff. There may be other important areas in teaching and learning beyond staff resources. Respondents might have also interpreted "facilities expansions and renovations" and "tools for discovery" as being directly related to the student experience in the library.

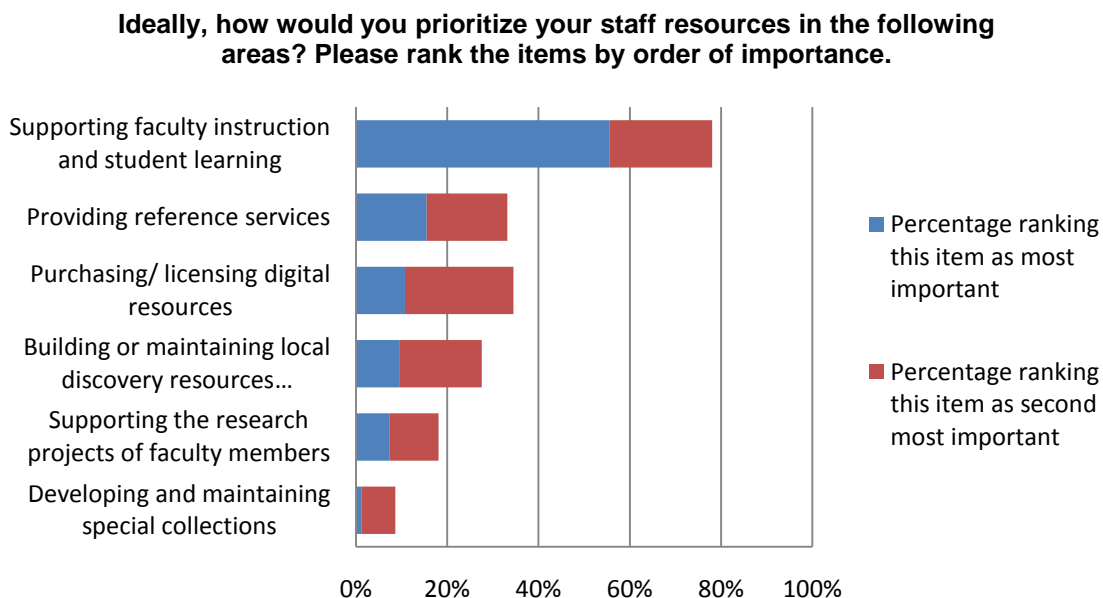
significantly exceeded their peers: 64% want to invest more money in online or digital journals (compared to an average of 55%) and 38% want to invest more in facilities expansions or renovations (compared with an average of 29%).

Respondents at baccalaureate colleges are more interested than those from other types of institutions in building or purchasing tools for discovery. Unsurprisingly, respondents from these institutions are less interested than most other institutions in digital preservation and institutional repositories.

What Are Directors' Staffing Priorities?

In parallel with the question about budget priorities, we asked respondents to rank staff priorities in their libraries. As with the role of the library, supporting teaching and learning was by far the most important priority, with 56% of respondents ranking this as the most important staff function.¹² This was especially striking given its position relative to supporting faculty research, which ranked fifth among the available options. Prioritization of staff resources to reference services remained most important to the second highest share of respondents. Commensurate with the results of the question about budgets, “purchasing/licensing digital resources” and “building or maintaining local discovery resources” ranked as fairly important staffing priorities. There was no substantial variation among different sizes of institutions.

Figure 8: Staff Resources

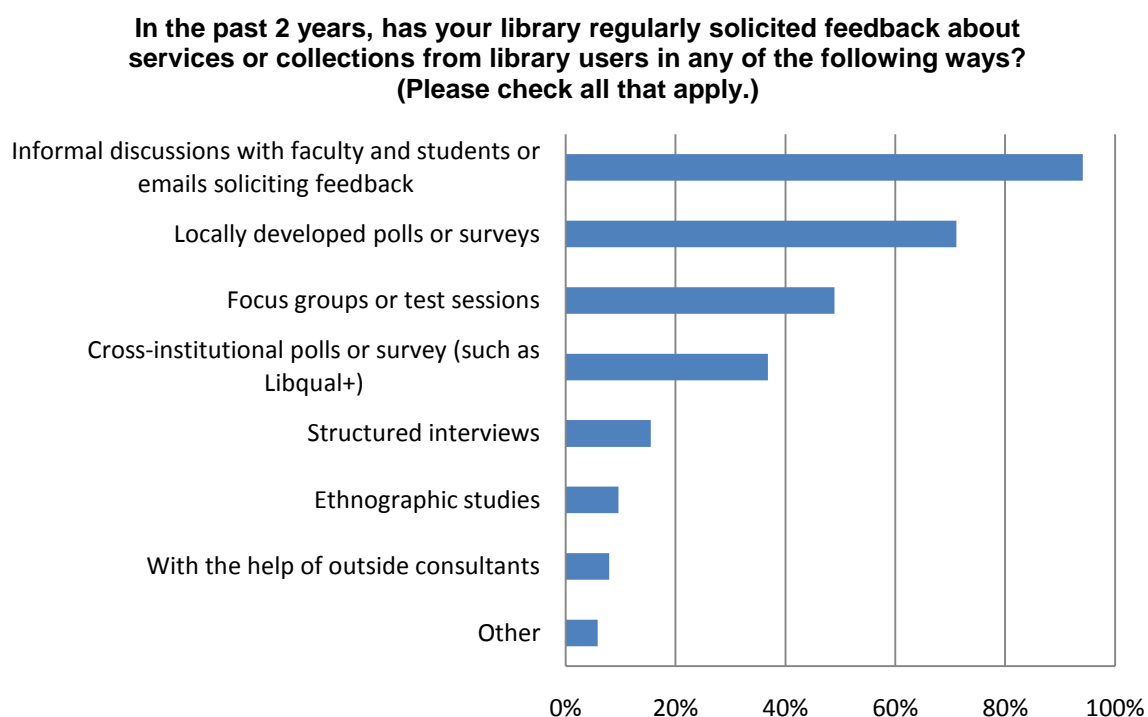


¹² The list of possible choices in this question was far from exhaustive, so it is best to interpret the results as a ranking of relative rather than absolute importance.

How Do Libraries Assess User Needs?

Many libraries have developed formal means of evaluating their users' needs through instruments such as focus groups, cross-institutional surveys, and local surveys (see Figure 9). Only 13% of all respondents reported that they have not gone beyond informal discussions with faculty members and students in their assessment methods. Still, these assessment methods have not necessarily convinced library directors that they are equipped to meet user needs: As mentioned above, 35% of respondents (49% at Baccalaureate institutions) agree with the statement "My library has a well-developed strategy to meet changing user needs and research habits."

Figure 9: User Needs Assessment



Summary of Key Findings

Most respondents do not think their libraries have conducted sufficient strategic planning to meet user needs for services and optimally manage collections. Thirty-five percent of respondents agreed with this statement, "My library has a well-developed strategy to meet changing user needs and research habits," and 47% said they have all the information they need to make informed decisions about when to deaccession print journals that they have access to digitally.

Library directors envision a high-level strategic prioritization of their research and teaching support and facilitation functions (expected to be important to more than 90% of respondents in

five years) in conjunction with a shift away, at least in some cases, from collections acquisitions and preservation functions (expected to shrink so it is important to 80% or less of respondents in five years).

There are a number of important divergences between high-level strategies on the one hand and budget priorities on the other, suggesting that library directors are in some cases not able to fully execute the strategic direction they have in mind for their libraries.

III. Core Library Services

While we asked respondents about many of the different types of services, two areas in particular seemed to be going through broad changes in which academic libraries are redefining and enhancing their roles. Below we analyze these two subjects—teaching and discovery—in greater detail. First, in response to library directors' overwhelming enthusiasm for teaching facilitation and information literacy, we examined some of the services related to these areas. Second, library directors' willingness to invest new funds in discovery, along with their continued commitment to securing a role for the academic library in this area, led us to make a closer examination of how they are approaching discovery strategy.

How Can the Library Enhance Teaching and Learning?

Some of the literature in the library community suggests that libraries are increasingly concerned with the role they play in teaching, and researchers are looking for new ways to measure and interpret that value. The recent *Value of Academic Libraries* report written by Megan Oakleaf (on behalf of ACRL) suggested that academic libraries might soon be assessed in terms of how they contribute to teaching and learning.¹³ In the report, Oakleaf summarized the work of thought leaders in the field: "In the past, academic libraries functioned primarily as information repositories; now they are becoming learning enterprises. This shift requires academic librarians to embed library services and resources in the teaching and learning activities of their institutions. In the new paradigm, librarians focus on information skills, not information access; they think like educators, not service providers."¹⁴ The question that remains is how libraries are striving to meet this new mission. Oakleaf proposed an extensive research agenda that would give librarians a means of measuring their success in advancing teaching, learning and student success at their institutions. Measuring the impact of the library in this area is not easy. At the end of their study of longitudinal survey data from undergraduates, George Kuh and Robert Gonyea concluded, "Library use does not appear to contribute directly to gains in information literacy and other desirable outcomes. This is not

¹³ Association of College and Research Libraries (researched by Megan Oakleaf), *The Value of Academic Libraries*, (Chicago: Association of Research Libraries, 2010).

¹⁴ *Ibid.* 37.

surprising, as rarely does any single experience or set of activities during college affect student learning and personal development one way or the other.”¹⁵

While libraries have turned their attention to teaching, most of the available data suggest that undergraduates do not look to academic libraries as their preferred way to access information. The OCLC report *College Students' Perceptions of Libraries and Information Resources* found that undergraduate students identified librarians and library resources as highly trustworthy sources of information, but that they rely much more heavily on search engines for the discovery of content; search engines serve as the starting point for 89% of information searches.¹⁶ Furthermore, libraries' physical collections are of low value to a significant subset of students; a third of college students reported that they use the library less than a few times a year.¹⁷ With statistics like these providing a context, we tried to understand how libraries are approaching their work with undergraduates.

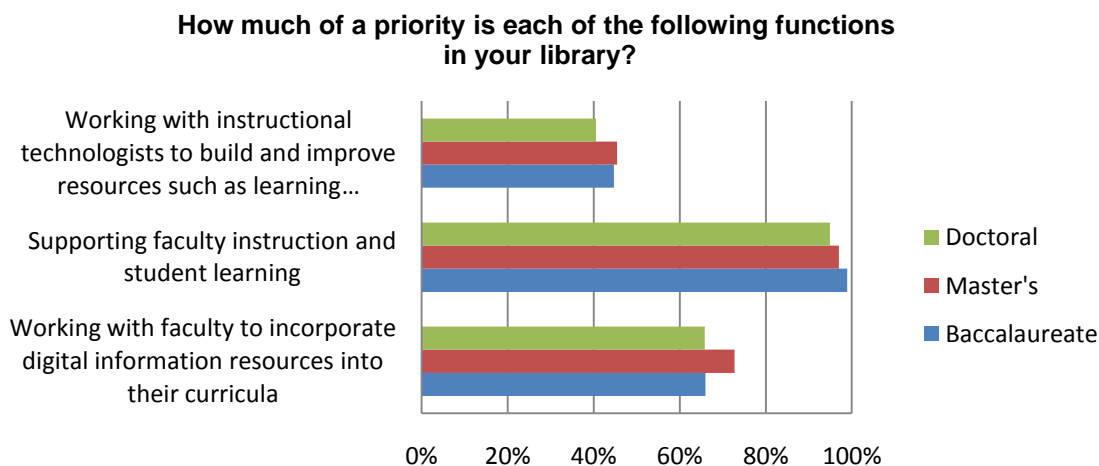
The Ithaka S+R Library Survey confirmed that academic libraries consider teaching and learning a top priority. While nearly all respondents (97%) said that “supporting faculty instruction and student learning” was very important to them, this did not mean that they place uniformly high value on services that touch on student learning experiences, as Figure 3 illustrates. We asked library directors about the importance of several of these activities. A majority of respondents (68%) said that it was important for their staffs to work with faculty to incorporate digital information resources into their curricula. Fewer library directors want their staff to be strongly involved in managing and enhancing teaching technology: only 44% of respondents said it is important to work with instructional technologists to build and improve resources such as learning management systems. Only 29% said that these are important at their libraries. These three roles do not capture all of the ways that students and librarians can interact with one another, but they suggest that at least some libraries have yet to refine the role that they will play in their institutions' teaching focus. The survey did not focus specifically on teaching services within libraries, and more research is needed into how this libraries plan to deliver them in the future.

¹⁵ George Kuh and Robert Gonyea, “The Roles of the Academic Library In Promoting Student Engagement in Learning,” *College and Research Libraries* 64 (4): 256-282 (July 2003). In addition to the growing literature on information literacy, there are new tools to help institutions assess student skills, such as SAILS (Standardized Assessment of Information Literacy Skills) and the Research Practices Survey (RPS).

¹⁶ Cathy De Rosa et. al., *College Students' Perceptions of Libraries and Information Resources*, (Dublin, Ohio: OCLC, 2006) 1-7.

¹⁷ *Ibid.* 1-2.

Figure 10: Services for Teaching and Learning



Percentage answering 5 or 6 on a scale of 1 to 6, where 6 represents "high priority" and 1 represents "not at all a priority."

Library directors expressed great willingness to invest more staff resources in “supporting faculty instruction and student learning” (see Figure 8 above); 76% said this was their first priority when they consider staffing questions.¹⁸ However, the survey did not capture exactly how this high-level priority translates into providing value for undergraduate education, nor did it identify what services this staff time supports.¹⁹ For example, some baccalaureate institutions might consider all of their activities to be indirectly supporting students. The question of how specific library activities support teaching and information literacy is another important area for future research and discussion.

What Is the Emerging Strategic Environment for Content Discovery?

Discovery has exploded as a theme for libraries in the past several years, as the online catalog and other traditional library-provided discovery points have faced stiff competition from consumer web search engines and their academic offerings. Libraries studying the issue have typically taken a user perspective and attempted to expose content as broadly as possible.²⁰ As one solution, “web-scale discovery services” have gained increasing prominence as a possible solution. In an environment of changing user behaviors, increasing information literacy requirements, and growing risks of preferential routing by search and discovery tools married organizationally with content offerings, the library’s strategic stewardship of its users’ discovery

¹⁸ Among doctoral universities there was less of a clear-cut top priority, but 45% still ranked teaching and learning as their top priority, compared with 18% who ranked research support for faculty as their top priority.

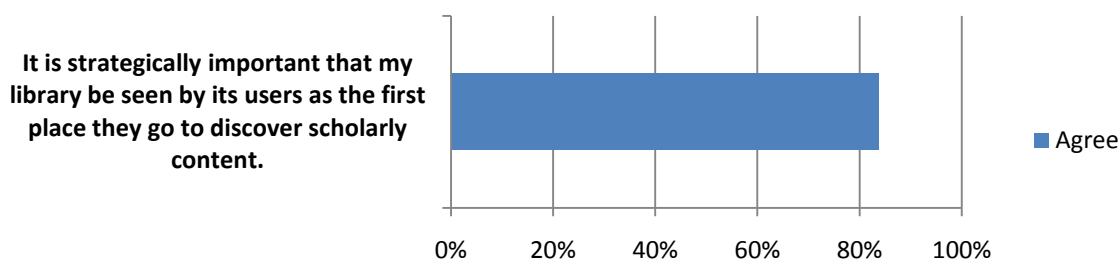
¹⁹ The priorities identified in this question clearly do not perfectly map to staff time. Consider, for example, while only 29% of respondents said that reference services were important, in this question they still identified it as the second highest priority in terms of staff time.

²⁰ See the recent strategic planning exercise from the University of Minnesota, that culminated in University of Minnesota Libraries, “Discoverability: Phase 2 Final Report,” September 27, 2010 (Cody Hanson and Heather Hessel, project co-chairs)

experience has probably never been more important. Ithaka S+R has been examining the academic library's changing role in content discovery through faculty and library survey projects dating back nearly a decade. In the Library Survey 2010, we gave greater attention to this topic in an effort to understand library priorities and practices for discovery.

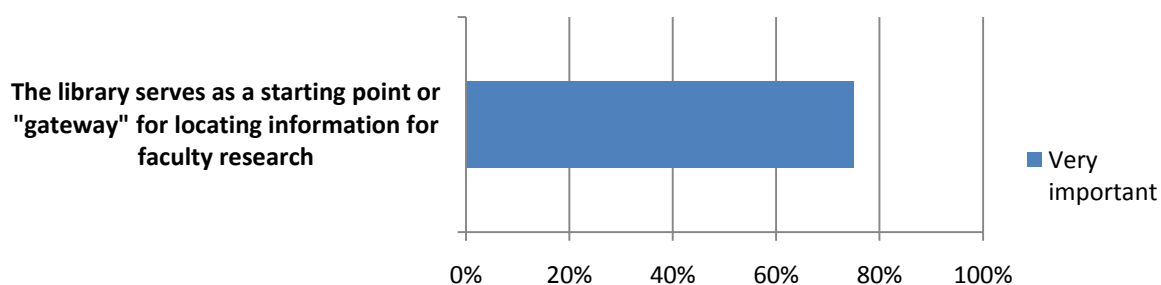
The responses to two different questions that appeared in different contexts within the survey suggested more than three-quarters of respondents agree that it is important that the library be seen as, or serve as, a starting point or gateway for faculty specifically or users generally. As Figure 2 shows, 84% of respondents agree that "It is strategically important that my library be seen by its users as the first place they go to discover content," with only a trivial share disagreeing with the statement. And, although of importance to the lowest share of six possibilities offered (as we saw in Figure 3), Figure 13 illustrates that over 75% of respondents agreed that it was important that "The library serves as a starting point or 'gateway' for locating information for faculty research."

Figure 11: Strategic Value of Discovery



Percentage answering 8, 9, or 10 on a scale of 1 to 10, where 10 represents "strongly agree" and 1 represents "strongly disagree."

Figure 12: Gateway Role

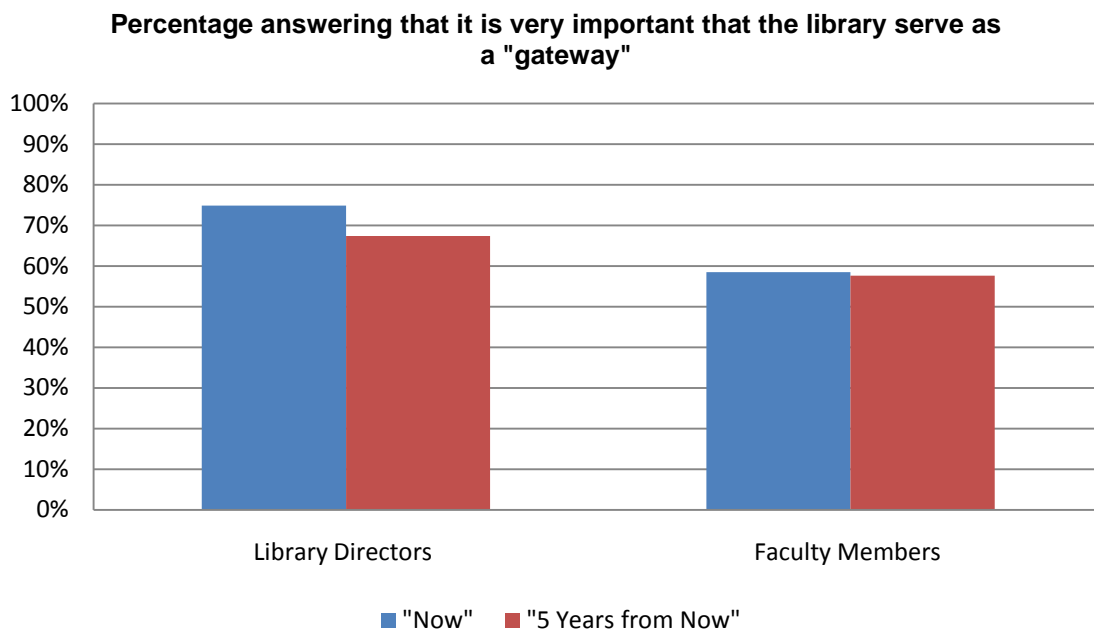


Percentage answering 8, 9, or 10 on a scale of 1 to 10, where 10 represents "strongly agree" and 1 represents "strongly disagree."

However, in comparison to library directors, approximately ten percentage points fewer of respondents to the Faculty Survey 2009 agree that the library's starting point or 'gateway' role is

important (see Figure 13).²¹ A declining share of both groups thinks that this role will be an important one for libraries five years from now. While library directors are convinced of the strategic significance of this role for their organizations, they indicate that its importance is likely to decline.

Figure 13: Changes in Gateway Role



In the Ithaka S+R Faculty Survey 2009, only 21% of respondents reported that they began their research process at either the library building or the library’s online catalog, a notable decline since this survey began tracking that question, with outside electronic research resources and general web search engines growing in importance as starting points.²² While some argue that licensed electronic resources, in particular, should be seen as library starting points, the fact remains that a declining share of library directors and faculty members alike perceive the role of the library as a starting point or ‘gateway’ to be important.

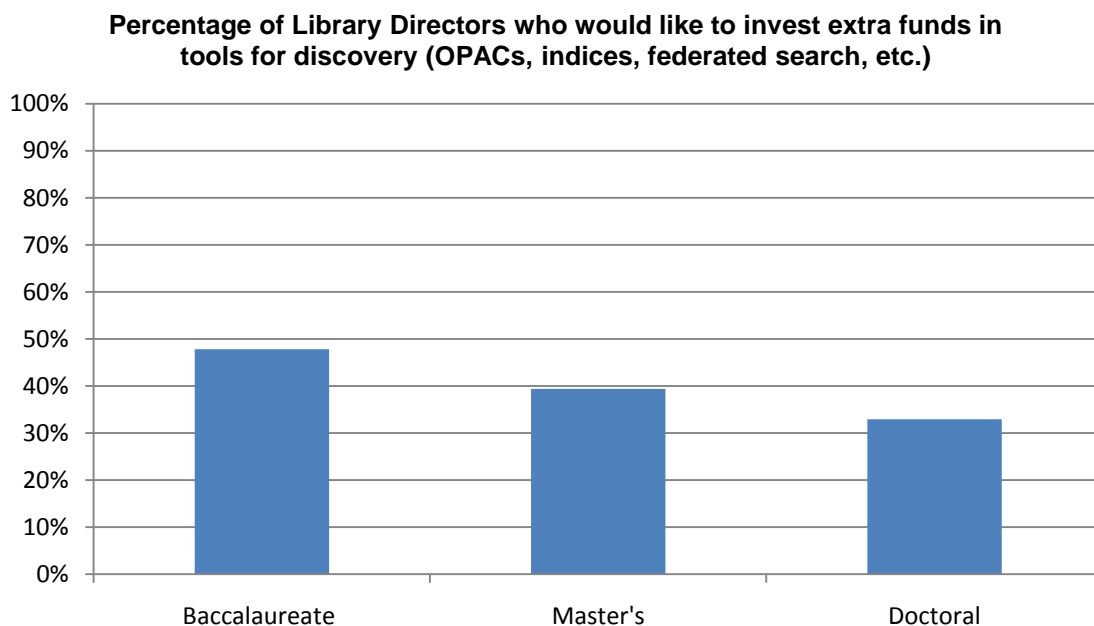
Perhaps because of this dynamic, many libraries are prepared to invest significant resources in this function in the coming years. As we saw earlier, more than 40% of respondents (the second largest group) would direct additional financial resources towards providing more tools for discovery. There is an important difference among institutional types, with roughly half of baccalaureate institutions prepared to direct additional financial resources to discovery tools as contrasted with notably lower shared of master’s and doctoral institutions, as illustrated in Figure

²¹ In the Faculty Survey, this question was measured on a 10-point scale rather than a 6-point scale, and so we compare 8-9-10 with 5-6, respectively.

²² The Ithaka S+R Faculty Survey 2009 found that 47% of faculty members start their research with a specific electronic resource and 31% being with a general-purpose search engine. Schonfeld and Housewright, 5. Broadly similar patterns were documented among undergraduates as well in De Rosa et. al., 1-7.

14. In the ranking of how respondents prioritize staff resources, building local discovery resources was fourth out of 6 choices.

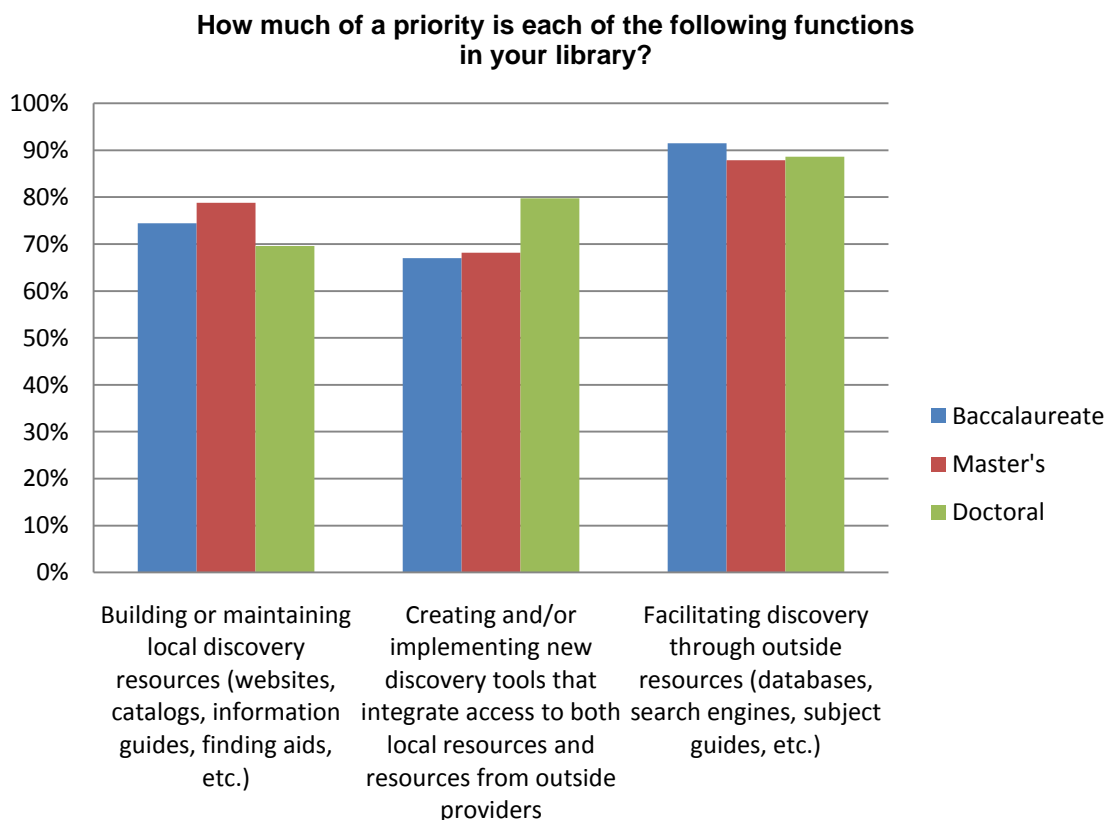
Figure 14: Investment in Discovery Tools



We asked how much priority libraries place on local discovery tools versus those provided by an outside vendor (such as a web-scale discovery service), or those that might blend outside resources with local tools. More respondents rated “facilitating discovery through outside resources” as important than rated local discovery tools as important. As Figure 15 illustrates, “building local discovery resources” and “creating or implementing discovery tools that integrate access to both local resources and outside resources” were approximately evenly rated.²³ While library directors see recognition for a starting point role as strategically important to the library, the greatest share of respondents prioritizes discovery resources that come from outside their libraries. Still, there was no overwhelming preference for local discovery resources over outside discovery resources or vice versa; libraries appear to be pursuing a mixed strategy on this issue. Virtually no respondents failed to select at least one of these three strategies as very important for their library. There are some notable differences across institutional types, as illustrated in Figure 15.

²³ Library directors who said that they would like to invest more money in discovery resources rated all of these functions as slightly more important: 77% said that local discovery resources are important (versus 74% overall), 79% said that integrated discovery tools are important (versus 72% overall), and 94% said that outside discovery resources are important (versus 90% overall).

Figure 15: Local and Outside Discovery



Percentage answering 5 or 6 on a scale of 1 to 6, where 6 represents "high priority" and 1 represents "not at all a priority."

Summary of Key Findings

Library directors at all types of institutions see supporting teaching and learning as one of their primary missions: 94% of respondents said that they see teaching information literacy skills to undergraduates as a very important role for their libraries. They would also like to work more closely with faculty members on supporting classroom instruction. However, a notably smaller share of faculty members values the library for its teaching support role, raising questions about how the library best works within an institutional context to pursue this role.

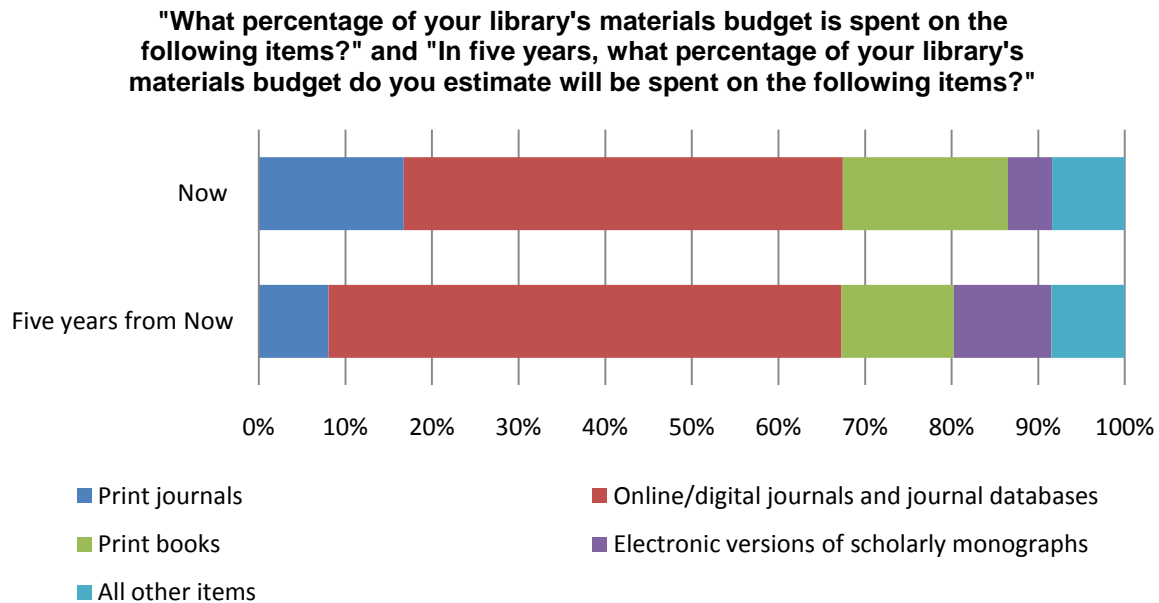
Library directors believe that it is strategically important that their libraries be seen by users as the principal starting point in the discovery process. While they recognize that faculty members and students increasingly rely on resources outside the library for discovery of information and content, they would like to invest more in discovery tools to aid users.

IV. Library Collections Development and Management

Libraries across the country are interested in rethinking how they develop and manage collections in an effort to better provide for user needs by freeing up space and redirecting staff and acquisitions budget towards emerging priorities and away from print collections. Yet, even while libraries plan to shift their attention gradually from collections to services, there are key outstanding strategic questions about how print collections will be managed and developed in the future. The print-to-electronic transition is progressing in a way that affects libraries' acquisitions as well as the collections that they currently hold. Journals, books, and other materials are available electronically, and in the case of journals, many users have come to prefer using them in an electronic format. We asked library directors about how they are approaching their collections development and management decisions in this evolving environment. We focused on two key groups of materials: books and journals, but we also asked questions about government documents (omitted from this report but available on request) and the impact of open access models on collections development.

We asked for an estimate of how the materials budget is allocated today and how it will be allocated in the future, with findings illustrated in Figure 16. Respondents predicted a steady shift towards digital materials over the next five years. They reported that 6% of their materials budgets will be shifted from print books to electronic books (bringing books expenditures in five years to 46% digital and 54% print), and 9% will be shifted from print journals to electronic journals (bringing journals expenditures to 88% digital and 12% print). Notably, notwithstanding the significant shift in expenditures away from monographs and towards journals over the past decades, respondents did not foresee any growth in their spending on journals at the expense of spending on books. For journals, respondents report that their libraries are winding down print acquisitions and will build principally electronic-only collections, but for books they appear to be entering a "dual format" era.

Figure 16: Library Materials Budgets



We also asked library directors about their current strategies and future plans for the management of their print collections. At the highest level, there is an important divergence between the way most academic library leaders view collections management issues for journals and for books, as illustrated in Figure 17 and 18. While a majority of respondents can envision ceasing to hold hard-copy journals collections in the near future, only a small minority can envision a similar dynamic for scholarly monographs.

Figure 17: Print to Electronic Transition: Journals

Within the next five years, the use of online or digitized journals will be so prevalent among faculty and students that it will not be necessary to maintain library collections of hard-copy journals.

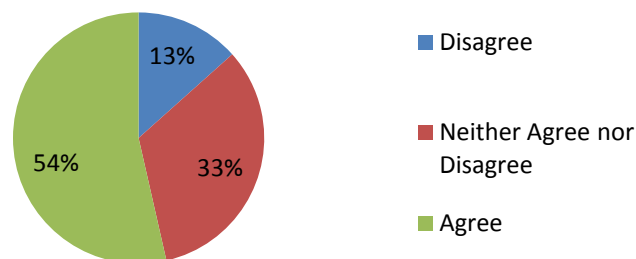


Figure 18: Print to Electronic Transition: Books

Within the next five years, the use of electronic versions of scholarly monographs will be so prevalent among faculty and students that it will not be necessary to maintain library collections of hard-copy books.



Is the print to electronic transition inevitable for scholarly journals?

There is an emerging consensus among library directors and faculty members that the existing access and preservation infrastructure indicates that libraries need not purchase current issues of scholarly journals in print format when they are available electronically. Print subscriptions budgets have been a target of library spending cuts in recent years, and few library leaders would like to restore those budgets: only 2% of respondents said that they would like to invest new money in print journals. They also predicted that five years from now, print journals will make up only 8% of their collections spending, compared with the 61% that will be spent on digital journals. In a reflection of this shift, digital journals remain the most important budget priority for libraries. The format transition in library journal purchasing among American academic libraries is drawing to a conclusion, with almost no institutions prioritizing print journal spending.

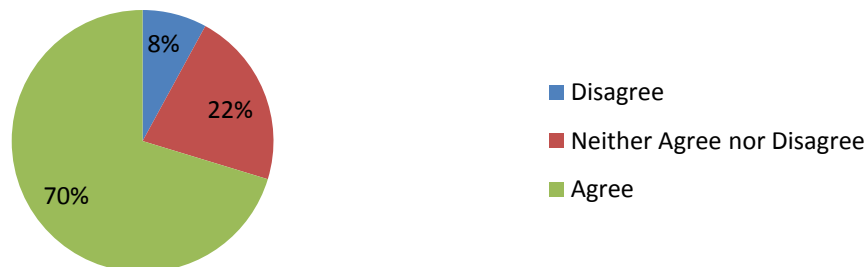
Ithaka S+R asked similar questions about print journals of faculty members in the Faculty Survey 2009, and a large majority (73%) said that they would be comfortable if their libraries no longer acquired current issues in print form so long as they are available electronically.²⁴ The latter figure has climbed from just over 50% when Ithaka S+R asked this question in 2003. Faculty members are increasingly in agreement with library directors that academic libraries need not be in the business of buying and collecting print journals.

Respondents to the survey to a large extent agreed with the idea that publishers can cease the print versions of their journals when available electronically (70% agreement). Library directors are significantly more enthusiastic on this matter than even the most enthusiastic disciplinary grouping of faculty members—scientists—which has about a 50% level of agreement using a slightly different scale.

²⁴ The exact statement was: "If my library cancelled the current issues of a print version of a journal but continued to make them available electronically, that would be fine by me."

Figure 19: Electronic Journal Publishing

I am completely comfortable with journals my library subscribes to ceasing their print versions and publishing in electronic-only form.



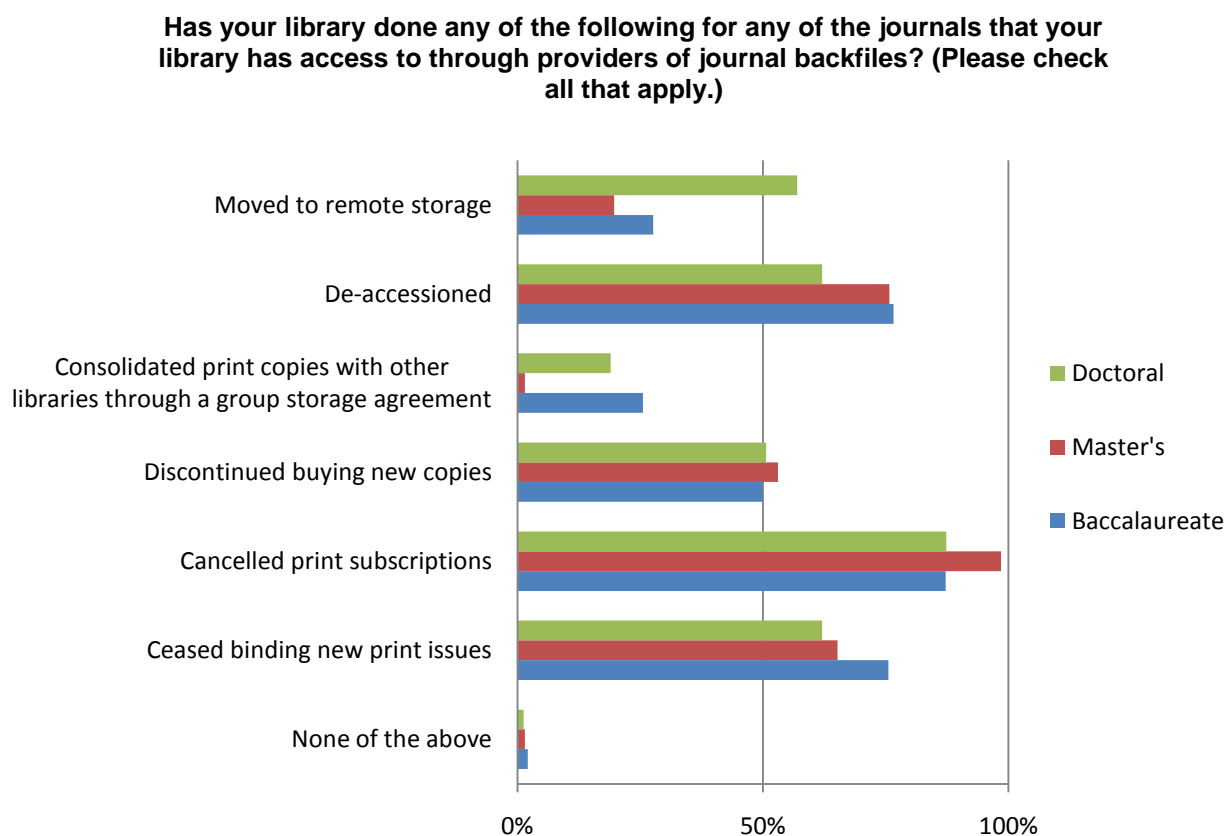
Most libraries are moving away from print journals by deaccessioning or moving journals offsite, ceasing their print subscriptions, or not binding new issues. While more libraries have taken these steps, there is still some ambivalence about how best to approach collections management decisions. Moving journals out of campus libraries, either by moving them to an offsite location or deaccessioning them altogether, has become an important collections management strategy at a large number of libraries. Among all respondents, 54% said that they do not believe that it will be necessary to maintain hard-copy journal collections after five years.²⁵ A large majority of respondents (82%) said that they have either deaccessioned hard-copies of journals or moved them to a remote storage facility. Furthermore, half of the 19% of libraries that have not already taken these steps have plans to deaccession journals in the future.

While most libraries have begun to move away from a reliance on print collections, few have articulated a specific strategy or policy for deaccessioning print journals, and an even smaller number have joined print sharing networks to capitalize on efficiencies at the network level. Only a minority (35%) of library directors said that their libraries have a formal plan for how to deaccession print journals that they have access to electronically and less than half respondents (47% of) agreed with the statement: “I feel confident that I have all the information I need to make informed decisions about whether to retain or de-accession print journal collections after my library has access to digital copies.” The lack of standards and policies means that collections management decisions at many libraries are made on a case-by-case basis, rather than as part of a strategic process of evaluating collections and access. This raises questions about whether libraries can ensure proper preservation of materials and whether they are best tailoring their decisions to meet the needs of their user communities. Given that 91% of libraries are now actively pursuing or considering a program to deaccession journals, the issues surrounding strategic print collections management decision-making are of crucial importance.

²⁵ This figure was only slightly lower among doctoral institutions, at 51%.

In the past, libraries were not always confident about discarding print copies of journals that they have access to through aggregation services and commercial publishers. However, as more and more journals are now digitally preserved in electronic archives, libraries have become more comfortable withdrawing print copies of journals from a variety of providers.²⁶ Library directors reported that the journals they move offsite are most likely to be drawn from the titles that they have access to through JSTOR (67%), Project MUSE (36%), EBSCO (24%) and Elsevier (22%).²⁷

Figure: 20 Print Journal Collections Management



Unsurprisingly, large research institutions follow more moderate print collections management patterns. A large number of them (57%) use offsite storage facilities for journal collections. Perhaps because they have this option available to them, they are somewhat less likely to have ceased binding new issues or to have deaccessioned journals.²⁸ Despite their higher commitment to print retention and preservation, many of these large doctoral institutions have

²⁶ Schonfeld and Housewright, *What to Withdraw? Print Collections Management in the Wake of Digitization*, Ithaka S+R, September 2009, 7.

²⁷ Other providers included Sage (19%), Oxford University Press (16%), Wiley (16%), Proquest (16%), and Cambridge University Press (11%). An additional 14% said that they had deaccessioned or moved offsite journals that were not listed in the survey, and another 11% said that they did not know or were not sure of what actions their library had taken. Note that Ithaka S+R is part of ITHAKA, the not-for-profit organization that provides JSTOR as a service.

²⁸ Only 62% of doctoral institutions have stopped binding new issues, compared with an overall average of 68% of all institutions, and only 62% have deaccessioned journals, compared with an overall average of 72%.

adopted one or more of the same strategies being used at smaller institutions. While they are more likely than other institutions to have made explicit plans for print collections management, less than half (42%) have a written policy. Additionally, doctoral universities are much more likely to take into account the actions that their peer libraries have taken with their own journals collections; 21% of doctoral institutions agreed with the statement “My decisions about the management of my library's print journal collections are not influenced by the decisions that other libraries make about their print journal collections,” while 49% of master’s institutions and 37% of baccalaureate colleges did the same.

Another striking difference among institutions is that almost no master’s colleges and universities have entered into group storage agreements, while about a fifth of other institutions report having done so.

On some campuses faculty and students have reacted very negatively to the withdrawal of print journals.²⁹ However, respondents to the survey reported that faculty reactions to withdrawing or deaccessioning journals have been mostly neutral or positive. Only 12% of institutions that had withdrawn or deaccessioned hard-copy journals reported negative reactions among faculty members and students, compared with 29% who reported positive reactions. (This was not true at doctoral institutions, where positive and negative reactions were about equal at 20%.) A small majority of respondents said that faculty and student impressions of their libraries’ collections management decisions had become increasingly positive over time, while less than 1% said that they had become increasingly negative. This might be because 64% of the libraries that responded to the survey had taken active steps to educate users about the reasoning behind their collections management decisions.

The library community has focused more attention on opportunities for collaboration in the preservation of print journals. Collaborative approaches to print collections management carry the promise of freeing up valuable library space, saving money on the maintenance of collections, and ensuring long-term preservation of print journals (and, in some cases, monographs). These group storage agreements help libraries make local decisions because they are usually accompanied by formal policies for identifying proper preservation standards for print materials at the network level.³⁰ WEST and other group storage projects systematize print collections management in a way that simplifies the decisions of individual libraries. However, there are still relatively few libraries (18%) that choose to participate in them. Among survey respondents, baccalaureate institutions were most likely to participate (with 26%) followed by doctoral institutions. Only one master-degree granting institution from the pool of respondents participates in a group storage agreement.³¹

²⁹ Jennifer Howard, “In Face of Professors’ ‘Fury,’ Syracuse U. Library Will Keep Books on Shelves,” *Chronicle of Higher Education*, November 12, 2009.

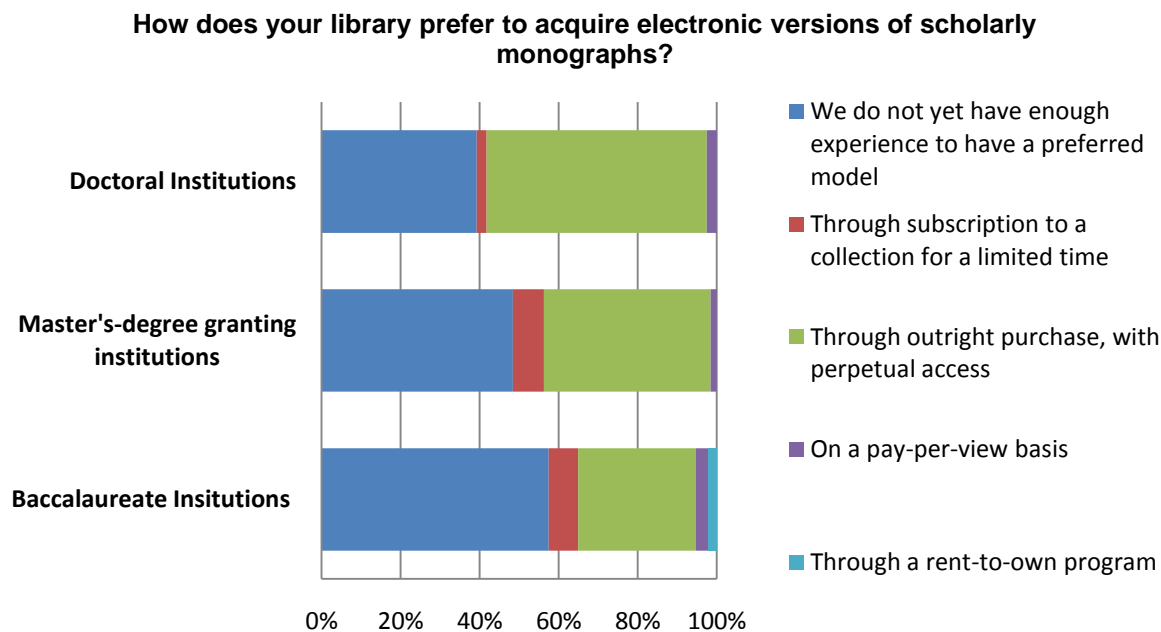
³⁰ The Western Regional Storage Trust (WEST), for example, has categorized journals into “title categories” based on their format, digital preservation status, and the extent of duplication across member libraries. With this framework in place, WEST can make informed decisions about which titles individual libraries can deaccession and which titles need to be placed in “dim” or “dark” archives to ensure long-term preservation. See Emily Stambaugh, “Heading West: Circling the Wagons to Ensure Preservation and Access,” *Against the Grain* 22 (5):18-20 (November 2010).

³¹ The high proportion of baccalaureate institutions that participate in print sharing agreements might be inflated by the large number of library directors from private liberal arts colleges who responded to the survey.

What models are emerging for access to electronic books?

The same overwhelming transition that has occurred for journals has yet to occur for books. Unlike for digital journals, there is no widely accepted access model for electronic books.³² Some have argued that favoring “access” instead of “ownership” will eventually result in an arrangement that is costly to libraries and does not ensure long-term preservation.³³ Many libraries (49%) do not yet have a preferred access model, with smaller institutions falling even more clearly in this direction, but there is a strong trend towards favoring one-time purchase models that guarantee perpetual access. Other methods of purchasing access to electronic books, such as rent-to-own programs, pay-per-view fees, or subscription models where libraries pay to access content for a limited time, were favored by only a small segment of the respondents. It seems that library directors seem to think of electronic books in the same way that they think of print books: they would like to purchase them once and have access to them as part of their research collection in perpetuity. This access model was particularly popular at doctoral institutions, where a clear majority (56%) would prefer to “buy” perpetual access.

Figure 21: Purchasing References for E-Books



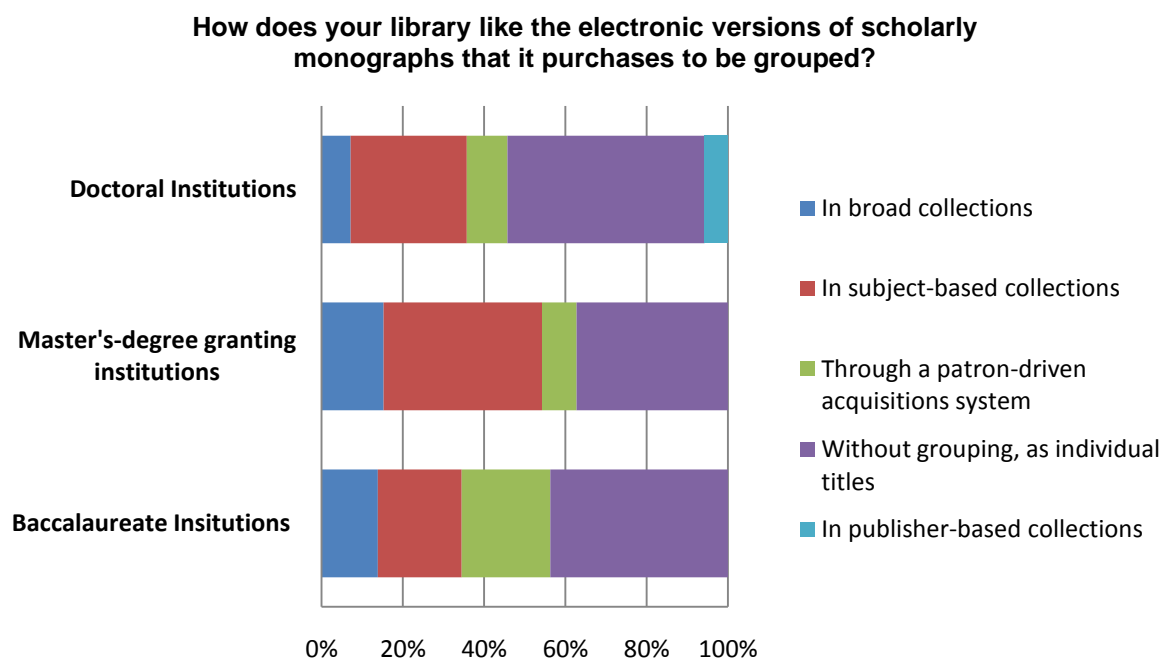
There is a broader range of opinion about how libraries would like the electronic book material that they buy to be grouped. Nearly half of doctoral institutions (49%) prefer purchases of individual titles. Master’s colleges and universities are more likely to want to purchase curated collections, either in subject based groupings (39%) or in broad collections (15%). Baccalaureate institutions showed the strongest interest in patron-driven acquisitions, with 22%

³² In the survey questionnaire, digitized and born-digital electronic books were referred to consistently as “electronic versions of scholarly monographs.” In this report, “electronic books” is used to describe both digitized and born-digital books.

³³Daniel Goldstein, “Library, Inc.,” *Chronicle of Higher Education*, October 17, 2010.

reporting that this is their preferred purchasing model. These libraries probably expressed this preference because they are more focused on serving the specific needs of undergraduates, rather than building general research collections. While individual titles hold the most appeal as a purchasing option, many libraries might also prefer to buy pre-curated electronic book content. The use of approval plans to select books (in both print and electronic formats) does not appear to be increasing or decreasing in any meaningful way. Approval plan spending is dominated by larger institutions; 65% of doctoral universities report spending more than 10% of their book acquisition budgets through approval plans, while only 20% of other institutions do the same. On the whole, libraries seem to favor a mix of options for purchasing electronic book content.

Figure 22: Grouping Purchases of E-Books



The print to electronic transition for books started more recently and it is not yet clear if it is on the same ultimate trajectory as for journals. Extensive questions remain about the technologies and interfaces that researchers will use to access electronic books, how libraries will ensure that print and digital versions are preserved, and how users will adapt to electronic formats. Studies have shown that electronic books hold the potential to vastly reduce library costs: Paul Courant and Matthew Nielson have documented that maintaining a local copy of an electronic book costs less than half of what it costs to keep a book in a high-density offsite storage facility, and in a remotely provisioned digital environment the differential would be only compounded.³⁴ However, the proper system-level infrastructure does not yet exist to allow libraries to take advantage of these efficiencies as they have for journals. As illustrated above, respondents do not anticipate an imminent format transition for books, perhaps because they are waiting for user needs to evolve or more trusted options for access and preservation become available.

³⁴ Paul Courant and Matthew Nielson, "On the Cost of Keeping a Book," *The Idea of Order: Transforming Research Collections for 21st Century Scholarship*, (Washington, D.C.: Council on Library and Information Resources, 2010), 101.

Some libraries have taken cautious steps towards relying more heavily on electronic book collections and less on print book collections. While remote storage facilities are mostly a strategy employed by large research universities, 15% of those institutions reported that they had moved more than 5% of their print book collection to an offsite facility because they have access to them electronically. A surprisingly high number of respondents (14%) said they had deaccessioned more than 5% of their print book collections because they have access to them electronically.³⁵ This strategy was most important to master's institutions, perhaps because they face space pressures but are not as likely to maintain offsite facilities.

Electronic books have not yet had the same effect on collections management strategies that online journals have had. Faculty members are generally uncomfortable with the idea of deaccessioning print books. In the Ithaka S+R Faculty Survey 2009, only 4% of respondents agreed with the statement "Within the next five years, the use of e-books will be so prominent among faculty and students that it will not be necessary to maintain local collections of hard-copy books."³⁶ Library directors share faculty members' position (only 7% of them agreed with the statement). This extreme statement was posed for benchmarking purposes, and it indicates that there will be no imminent sudden transition to electronic books.

While they are not yet comfortable with a format transition, most library directors are comfortable with the idea of eventually deaccessioning print book collections under the proper conditions. We presented them with a concept statement for how electronic versions of books and monographs might be handled in the future. This statement was drafted at the request and assistance of attendees of a LYRASIS forum to define a future for books collections in a digital environment.³⁷

Suppose there existed a robust system for preservation of and access to historical monograph collections. In such a system, the millions of books digitized through the Google library digitization project would be readily available in digital form for use by your community. Digital preservation would be assured by a trusted third party archive, and the paper source materials would be preserved in a suitable number of print archives. Ultimately, discovery and accessibility would be greatly improved while preservation would be assured.

In this scenario, 74% of respondents said that the withdrawal of print books would be an important strategy for their libraries in the future. Only 33% of libraries went as far as to say that they would be likely to withdraw their print book collections.³⁸ A large majority of libraries (84%) said that they would be more likely to withdraw their print book collections if they could access print copies of books through a trusted sharing network. The responses to the concept

³⁵ This was most common at master's institutions (23%), followed by doctoral institutions (11%) and baccalaureate institutions (10%).

³⁶ Schonfeld and Housewright, *Faculty Survey 2009*. The statement that appeared in the Library Survey was identical except that it referred to ebooks as "electronic versions of scholarly monographs."

³⁷ See Robert Kieft and Lizanne Payne, "A Nation-Wide Planning Framework for Large-Scale Collaboration on Legacy Print Collections," *Collaborative Librarianship* 2 (4): 229-233 (2010).

³⁸ The question did not specify whether it referred to parts of their collections or their entire monograph collection.

statement shows that digitized or digital versions of books and monographs could play a valuable role for libraries in the future, provided that access, discoverability, and digital as well as print preservation are properly managed. Print sharing networks that provide on-demand access would also add further value in this scenario. Of course, this concept statement presented an ideal situation for preservation of and access to digitized and born-digital books. It is not an indication that all libraries are prepared for an immediate format transition, but rather that a significant number of them are open to the idea of relying more heavily on digital book collections if the proper circumstances are in place.

On the other hand, 26% of respondents said that the withdrawal of print books would not be an important strategy for them. Even in such a preservation scenario, there are library directors who would not elect to withdraw print collections, perhaps because they feel these collections add unique value or because they do not face any significant space pressures at their libraries. Baccalaureate colleges were more uncomfortable with the idea of withdrawing print book collections than other groups. Only 61% of respondents from baccalaureate colleges thought withdrawing print book collections might be an important strategy at their institution in the future, compared with an average of about 80% of all other respondents.

The concept statement in the survey might become a reality in just a few years, but until then there are key concerns that hold libraries back from withdrawing or deaccessioning print book collections. A number of other researchers have examined the conditions that would have to be in place to allow libraries to withdraw print books. A recent OCLC Research study on the future of the cloud-sourcing research collections concluded, "There is sufficient material in the mass-digitized library collection managed by the HathiTrust to duplicate a sizeable (and growing) portion of virtually any academic library in the United States, and there is adequate duplication between the shared digital repository and large-scale print storage facilities to enable a great number of academic libraries to reconsider their local print management operations"³⁹ The main obstacle to this is the lack of a licensing option for the books that make up the HathiTrust archive, only 17% of which are in the public domain.⁴⁰ The report concluded that NYU's Elmer Holmes Bobst Library, which was the focus of the study, could overcome this obstacle with a hybrid of digital access and the use of a shared print repository. However, with so few libraries participating in shared print repositories, this remedy does not provide libraries with an immediate solution to the access problem. Other providers of both front list and backlist ebooks have yet to build up enough trust among libraries; Lisa Spiro and Geneva Henry write: "Although the e-book industry is maturing, those concerns still hold, since much content is not yet available electronically, business models are unsettled and multifarious, and universally satisfactory solutions for reading long-form scholarly works on a screen have not yet emerged."⁴¹

³⁹ Constance Malpas, *Cloud-sourcing Research Collections: Managing Print in the Mass-digitized Library Environment*, (Dublin, Ohio: OCLC Research, 2011).

⁴⁰ *Ibid.* 25.

⁴¹ Lisa Spiro and Geneva Henry, "Can a New Research Library be all Digital?" *The Idea of Order: Transforming Research Collections for 21st Century Scholarship*, (Washington, D.C.: Council on Library and Information Resources, 2010).

Open Access

The survey offered several questions related to open access but not a thorough treatment of attitudes on this topic. Open access was a popular strategy among respondents, but its impact was difficult to measure. The rising price of materials continues to be a concern at all types of academic libraries. A majority of respondents (64%) said that high prices constrain their ability to provide the materials that the faculty members at their institutions demand. While higher than would be desired, this figure is perhaps somewhat lower than an observer might have predicted. In addition, only about a third of library directors think that faculty members have become more aware of the cost of library materials over the past decade (Figure 23).⁴²

Figure 23: Faculty Awareness of Cost of Library Materials

Faculty members are more aware of the costs of library materials now than they were ten years ago.



As a community, library directors are comfortable guiding users to open access materials, and they think their libraries play an important role in communicating with researchers about the issues and opportunities surrounding open access. Library directors believe that academic libraries have an important role to play in communicating the role of open access to scholars. A large majority (83%) of respondents agreed with the statement: "Academic libraries should take an active role in educating faculty members about open access (Figure 24)." Moreover, they agree that open access journals that are linked from their website are part of their research collections (Figure 25).

⁴² 35% agreed with, 51% were neutral towards, and 14% disagreed with the statement: "Faculty members are more aware of the costs of library materials now than they were ten years ago."

Figure 24: Educating Faculty about Open Access

Academic libraries should take an active role in educating faculty members about open access.

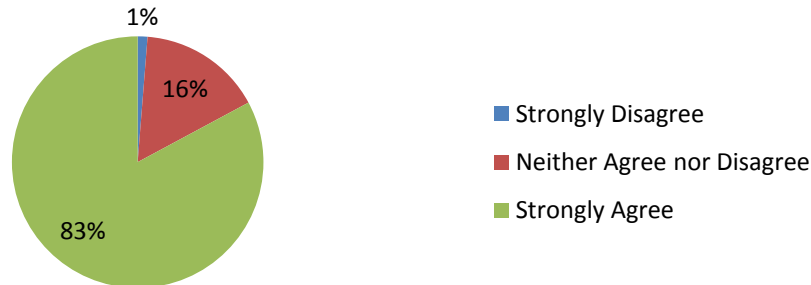
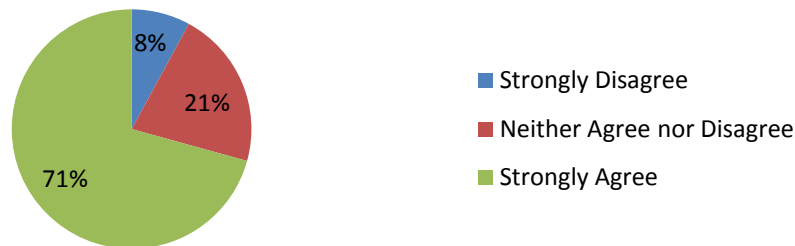


Figure 25: Open Access Journals as Part of Collections

Open access journals that are linked from my library's website are part of its research collection.



Some have argued that institutional repositories have an important role to play in the future of providing open access to research outputs. Of responding library directors with an institutional repository, 53% see providing open access to materials as the key function of their repository, though the percentage of respondents who agreed with this statement was much higher among doctoral institutions (at 66%).⁴³ For comparison, in the 2009 Ithaka S+R Faculty Survey, 40% of respondents to that survey said that when they are looking for a journal to publish their research, it is important that the journal provide articles freely on the internet.⁴⁴ However, without more questions about repositories it is difficult to judge what other key functions drive the foundation of most institutional repositories.

⁴³ Survey-takers were asked to respond to this question only if they have a repository at their institution; 53% of respondents self-reported that they have institutional repositories.

⁴⁴ Schonfeld and Housewright, *Faculty Survey 2009*, 25-6.

Summary of Key Findings

The library's role as a buyer of materials remains of primary importance, both in terms of how library directors prioritize their spending and how faculty members view the library. Electronic journals are a significant budget priority for many, and respondents envision a continued gradual rise in the amount that they spend on digital materials and commensurate reduction in expenditures for print materials. They expect in five years to essentially complete the transition to electronic format for journals acquisitions and at that point spend nearly half their books budget on electronic books.

Most libraries have become comfortable with deaccessioning or moving offsite their print journal collections after they have reliable digital access to copies of these materials: 91% have already done so or are planning to do so in the future. This is not the case for books, at least not yet. However, a significant portion of respondents would be willing to consider deaccessioning or moving offsite their print books collections if the proper preservation and access infrastructure is put in place.

V. Conclusion

In attempting to take stock of numerous elements of library strategy, services, and collections, the Ithaka S+R Library Survey found essential consensus on one key issue: Academic library directors identified their libraries' mission with the support of teaching and learning. More research is needed as to how libraries are contributing to the teaching needs of their institutions, especially given how many library directors do not feel they have strategies to meet user needs. The disconnect between faculty members and library directors with regard to the library's role in teaching and learning underscores the need for more communication with user populations at all levels.

In collections management, the past two to three years have been a period of dramatic change not only for journals collections but increasingly for monographs, and in combination with recent fiscal realities, is leading to a broader willingness to rethink collections. Most library leaders are now very comfortable with decisions to cancel print journal subscriptions, move print journals to offsite storage facilities, and deaccession journals to which they have access electronically. While books might someday follow the same pattern, there is no indication that this transition is imminent. However, many libraries are approaching print collections management without putting a plan or an overall strategy in place. This suggests the local leadership and decision-making on this issue may not effectively support long-term access to and preservation of print collections following their digital availability, notwithstanding the many community initiatives underway.

The Ithaka S+R Library Survey's snapshot of the strategic perspective of academic library directors offers another data point charting efforts in this community to adapt to an increasingly electronic environment. Strategy and leadership, at times clearly quite focused, are also in some cases deserving of re-examination. As campus-specific and community-wide developments continue, Ithaka S+R intends to continue to monitor changes in library strategy, services, and collections, to continue to provide data and analysis that inform the community dialogue about the future of the library.

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