Ithaka S+R US Library Survey 2013

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Ithaka S+R is a strategic consulting and research service provided by ITHAKA, a not-for-profit organization dedicated to helping the academic community use digital technologies to preserve the scholarly record and to advance research and teaching in sustainable ways. Ithaka S+R focuses on the transformation of scholarship and teaching in an online environment, with the goal of identifying the critical issues facing our community and acting as a catalyst for change. JSTOR, a research and learning platform, and Portico, a digital preservation service, are also part of ITHAKA.

ITHAKA is interested in disseminating this report as widely as possible. Please contact us with any questions about using the report: research@ithaka.org.

Table of Contents

Preface

Today's academic libraries are experiencing broad challenges and opportunities alike. Local print collections are losing primacy as remotely accessed online resources increase in importance, new discovery services have changed the library's role as a gateway, and the introduction of computational research methods has yielded demand for innovative and customized services and relationships. Academic libraries' parent organizations, the colleges and universities, are grappling with their roles and responsibilities as online and hybrid pedagogies continue to develop and cost-of-education sensitivity yields growing scrutiny about the outcomes of their educational offerings. Amid these environmental changes, library leaders are being called upon to assert the value of their organizations while developing services and strategies that will offer sustained value.

Against this backdrop, Ithaka S+R's US Library Survey tracks the strategic direction and leadership dynamics of academic library leaders. Our purposes are to understand the strategies they are pursuing and the opportunities and constraints that they face, and also to compare their attitudes on key services against those of other campus stakeholders such as faculty members. In the previous 2010 survey cycle, we examined strategy, collecting, and services. For the 2013 survey, we worked with an advisory board that included librarians, a consortial leader, and a university leader to further develop the questionnaire, retaining key issues from 2010 while introducing a new emphasis on organizational dynamics, leadership issues, and undergraduate services.

Tracked systematically over time and analyzed where appropriate by institutional type, the project suggests the real diversity of American academic libraries as they face technological and other environmental changes in their different institutional settings. We hope the findings from this project will continue to serve the higher education community as it confronts the changing role of the library in service of the information needs of researchers, instructors, and students.

Deanna Marcum
Managing Director

Ithaka S+R

Executive Summary

The Ithaka S+R Library Survey 2013 examines strategy and leadership issues through the eyes of academic library deans and directors. In fall 2013, we fielded the Library Survey to the dean or director of the general or principal library at each four-year college and university in the United States. The survey did not include community colleges. We received 499 responses, or a response rate of 33%. Our aim in this project was to learn about chief librarians' visions and the opportunities and constraints they face in leading their organizations.

Key findings

This cycle of the US Library Survey illustrates the pronounced differences in academic library leaders by institutional type. Views on collections, services, and organizational positioning differ notably across Carnegie classifications. While there are also many areas of broad commonality, this diversity appears to be a key and perhaps growing characteristic for this community.

On vision and strategy:

- With almost complete unanimity, library directors showed a very strong commitment to the role that their libraries play in research skills and information literacy education for undergraduate students. Academic libraries' strong alignment around teaching and undergraduate education may have far-reaching implications for how they prioritize their other functions.

- Outside the doctoral universities, there was an especially steep decline in the share of respondents invested in the research support role.

- As in 2010, only a minority of respondents agreed that their library has a well-developed strategy for serving the changing needs of users. Those respondents whose libraries have taken on evidence gathering and other forms of assessment are more likely to be confident in their strategy for serving user needs.

On organizational leadership and constraints:

- Library directors' roles within their institution vary widely, with directors at larger institutions much more likely to feel themselves to be part of the senior academic administration than do directors elsewhere.

- There is a broad sense that directors' supervisors are at least somewhat less likely to support all library functions than are the directors themselves. The gap is pronounced in two areas: the preservation and archiving role outside of the research universities, suggesting possible tension between an expressed value of the library profession and the organizational priorities of smaller and less research-intensive colleges and universities; and the instructional support role at the doctoral institutions, where library leaders seem to have less institutional support for focusing resources on undergraduate needs than presents itself at other types of institutions.

On collections and formats:

- A minority of respondents, even at doctoral institutions, believes that purchasing print books to build research collections is important, while the large majority believes that building local print collections has declined in importance. By comparison, the vast majority of respondents see resource sharing as an important library function and there is ample evidence across institutional types of the importance of collaborative approaches to serving users' information needs.

- For journals, the shift from print to electronic collecting has been, from a budget allocation perspective, nearly completed. Library directors tend to be more comfortable than are faculty members with the print to electronic transition for scholarly journals.

- A possible format shift from print books to ebooks appears to be occurring at a more measured pace, with relatively small projected increases in ebook spending. Views about the importance of ebooks in their libraries have not measurably changed over the past three years. With respect to books, library directors may if anything be less aggressive in moving towards electronic formats than are faculty members.

On budget and staffing:

- Library directors see limited financial resources as a major constraint. Many of them concur about how they would spend new funds, if they were available. Along with staffing, investing more money in online or digital content, including both journals and ebooks, is of strong interest at all types of libraries. Other areas, such as increasing staffing in special collections and building repository- or publishing-related services for faculty members are more likely to be priorities at the doctoral institutions.

- Library directors' responses signaled the continuing and perhaps growing importance of staff relative to other major categories of expenditure. Many directors are concerned about limited staff capacity and skills and would spend newly available funding on staff positions or salary increases for existing staff.

- New hires are expected to concentrate in emerging and growing areas such as web services; digital preservation; and instruction, instructional design, and information literacy services, with declines expected in more established areas such as reference, technical services, and print collections management.

On undergraduates and information literacy:

- The near-unanimity in feeling that teaching undergraduate research skills and information literacy is an important library function is reflected in library directors' widespread confidence that it is principally the library's responsibility to foster these skills. Faculty members have a more mixed view of where this principal responsibility may reside.

- Two core undergraduate services of widespread importance were "providing reference instruction to undergraduate classes" and "providing a physical space for student collaboration." Beyond these, we did not identify other learning support services that have taken hold to the same degree.

- At those institutions that provide some form of academic instruction online, a substantial share of directors do not feel that their libraries are fully prepared to provide support students in online courses.

The current cycle of the Library Survey has allowed for the tracking of certain key questions over time, with clear trend lines beginning to emerge on issues such as the role of the library, evidence-based strategic planning, and library services. We look forward to further tracking of the issues in the survey over time, with the next cycle of this survey anticipated in 2016.

Introduction

The Ithaka S+R Library Survey 2013 covers library deans and directors at not-for-profit four-year academic institutions in the United States. This is the second cycle of the survey, which was first conducted in 2010. It is part of a larger program of survey research carried out by Ithaka S+R. The goal of the Ithaka S+R survey program is to provide data for informed planning and decision-making in academic institutions; it includes the Ithaka S+R Library Survey, the Ithaka S+R Faculty Survey, local surveys of faculty members and students, and planning tools for institutions. The full set of surveys brings together the perspectives of different stakeholder communities in order to give libraries holistic data-gathering and planning resources.

The Library Survey provides unique insights into the perspectives, priorities, and long-term plans of the leaders of academic libraries. By focusing on the chief executive of each academic library, this survey affords a special emphasis on high-level issues like strategy, leadership, budget, and staffing. These decision-makers play an important role in shaping the future of library services and collections at their colleges and universities. This report aims to provide academic librarians and higher education leaders with information about important issues and trends that are shaping the purpose, role, and viability of the academic library.

The results from the 2013 survey illustrate the incredible diversity of the library community, and they show the divergent strategies that different libraries are using to respond to user needs. For example, while some large research libraries are investing in data management and scholarly communications initiatives to serve their faculty members, other institutions are focusing on building teaching support services.

This report provides a first analysis of the data gathered through the survey questionnaire. In order to provide others the opportunity to make further analysis of these data, Ithaka S+R will deposit the dataset with ICPSR in 2014.

Methodology

Population

The list of institutions that Ithaka S+R used as a base for the 2013 sample in the U.S. was taken from the Carnegie Foundation's database of institutions, which was last updated in 2010. Nine of the Foundation's "Basic" classifications were used as the population for the survey:

1. Bac/Assoc: Baccalaureate/Associate's Colleges

2. Bac/Diverse: Baccalaureate Colleges—Diverse Fields

3. Bac/A&S: Baccalaureate Colleges—Arts & Sciences

4. Master's S: Master's Colleges and Universities (smaller programs)

5. Master's M: Master's Colleges and Universities (medium programs)

6. Master's L: Master's Colleges and Universities (larger programs)

7. DRU: Doctoral/Research Universities

8. RU/H: Research Universities (high research activity)

9. RU/VH: Research Universities (very high research activity)

The list of all not-for-profit institutions from these classifications contained 1570 colleges and universities in the United States. From this list of 1570, we excluded 62 institutions from our survey population. These institutions were excluded for a variety of reasons: many of them do not operate their own library, some had no active library director, and some institutions had either closed or lost their accreditation.

We identified one individual from each institution who had oversight over the library and its staff. The final list of contacts included 1508 people in the United States. This list actually represents 1516 institutions, because 8 of the "excluded" institutions share their library services with other members of a consortium, and therefore their library directors were in fact included in the survey.[1] While the respondents to this survey have a broad variety of different job titles, for simplicity we refer to them in this report as "library directors."

In our analysis, we break down the survey responses into three major groups: doctoral universities, master's colleges and universities, and baccalaureate colleges, each of which includes three of the categories listed above. We have used these institutional type categories to show the diversity of responses from different types of institutions. We recognize that there is great diversity even within each of the three type categories we have used for analysis.

Distribution

Ithaka S+R Managing Director Deanna Marcum sent an invitation email to 1508 contacts on October 2, 2013. Reminder emails were sent to non-respondents on October 16th and October 23rd, and the survey was closed on October 28th.[2]

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1   Contact information for the U.S. institutions came from two different sources: some of it was obtained from MDR, a commercial mailing list vendor, while the rest was assembled internally by Ithaka S+R. All of the MDR contact data was verified before the survey was deployed.
2   Among the 1508 institutions, there were several dozen emails that did not reach their intended recipients for a variety of reasons (including incorrect emails addresses, firewall protections, etc.). We have not excluded these institutions from our population when calculating the response rate to the survey.

Response Rate and Reporting

During the survey period, we received 499 completed responses. The chart below shows the number of responses, the population size, and the response rate for the three primary size-based subgroups.

FIGURE 1
Response Rate by Group

	Number of Responses	Number of Individuals Invited	Response Rate
Baccalaureate	186	612	30.4%
Master's	190	620	30.6%
Doctoral	123	276	44.6%
Total	499	1508	33.1%

The data presented in this report have not been weighted or otherwise transformed in any way, so we ask the reader to bear in mind that response rates differed to some degree by institutional type. At the institutional type level, Figure 1 shows that the response rate for doctoral institutions was higher than for other types of institutions. Throughout this report, we have reproduced the data by subgroup when there are notable differences among the baccalaureate, master's, and doctoral institutions.

The response rate also varies among the three Carnegie classifications that make up each of the subgroups. Figure 2 shows the response rate for each Carnegie group. Most are relatively even within their aggregate master's and doctoral groupings, but there was much higher response rate among larger baccalaureate institutions. This is an important artifact in interpreting both aggregate and baccalaureate findings throughout the study.

FIGURE 2
Response Rate by Group

Bac/A&S: Baccalaureate Colleges--Arts & Sciences	39.2%
Bac/Diverse: Baccalaureate Colleges--Diverse Fields	25.2%
Bac/Assoc: Baccalaureate/Associate's Colleges	18.2%
Master's L: Master's Colleges and Universities (larger programs)	32.2%
Master's M: Master's Colleges and Universities (medium programs)	29.1%
Master's S: Master's Colleges and Universities (smaller programs)	26.9%
RU/VH: Research Universities (very high research activity)	42.6%
RU/H: Research Universities (high research activity)	47.9%
DRU: Doctoral/Research Universities	43.1%

Notes on the Questionnaire

While many questions in the survey were repeated from the 2010 version of the questionnaire, we made adjustments to the text of some of these questions. We have noted these changes and caution readers to be careful when comparing any data where the questions have changed.

While the order of the pages in the online survey was fixed, many elements of the survey (including questions, answer choices, and lists of items) appeared to respondents in a randomized order. The goal of this randomization was to reduce response bias.

Many of the survey questions used Likert-type scales to register responses. In 2013, we introduced a new scale format for new questions. In the old format, respondents rated items along a scale with 10 numerical points, where each extreme of the scale was represented as a text description (e.g. "very important" and "not at all important") and each of the numerical points from 1-10 represented a degree of severity along that scale. All of the questions that were carried over from previous surveys used this scale, in order to preserve the comparability of the data gathered in the 2013 survey. For questions newly introduced in the 2013 survey, we introduced an alternate scale format. In the new format, each

scale had only 7 points, and each was represented by a text description (e.g. "very important," "important," somewhat important," etc.). We have noted the cases where we have used the seven-point scale.

With all of the questions where we used Likert-type scales, we have grouped the responses when analyzing the data. For the ten-point numerical scales, we group responses into three groups: 1-3, 4-7, and 8-10. Thus, on a scale where "10" represents "Strongly Agree" and "1" represents "Strongly Disagree," we have identified respondents who answered 8-10 as those who strongly agree, respondents who answered 4-7 as being neutral, and respondents who answered 1-3 as those who strongly disagree. In a similar fashion, for the seven point scales, we have grouped the top two responses, the middle three responses, and the lowest two responses.

Acknowledgments

Strategy and Leadership

One of the foremost goals of this project was to understand library directors' perspectives as they set goals for their libraries, make strategic planning decisions, and work with other administrators at their colleges and universities. As in 2010, only a minority of respondents reported that they have well-developed strategies for serving the changing needs of users. Many of them struggle without the financial resources to enact the changes they would like to put in place in their libraries.

With almost complete unanimity, library directors showed a very strong commitment to the role that their libraries play in information literacy education for undergraduate students. In addition, many directors believe that their immediate supervisor also sees this as the most crucial service that the library provides. Academic libraries' strong alignment around teaching and undergraduate education may have far-reaching implications for how they prioritize their other functions.

Although library directors at most institutions feel a relatively high level of alignment with their "immediate supervisor" in the institutional administration, there are some areas where they hold different opinions about the role of the library. In particular, respondents at all types of institutions perceive that they place greater value on their libraries' role as a repository of resources than do their immediate supervisors. Library directors' roles within their institution vary widely, with directors at larger institutions much more likely to feel like part of the senior administration.

Perceptions of the Role of the Library

The survey included a version of a question about the role of the academic library that Ithaka S+R has regularly asked respondents to its triennial Faculty Survey. We asked: "How important to you is it that your college or university library provides each of the functions below or serves in the capacity listed below?" Respondents rate the importance of the following six roles of the library:

1. "The library serves as a starting point or "gateway" for locating information for faculty research."

2. "The library pays for resources faculty members need, from academic journals to books to electronic resources."

3. "The library serves as a repository of resources; in other words, it archives, preserves, and keeps track of resources."

4. "The library supports and facilitates faculty teaching activities."

5. "The library provides active support that helps increase the productivity of faculty research and scholarship."

6. "The library helps undergraduates develop research, critical analysis, and information literacy skills."

These six roles simplify the many activities of many libraries to examine at a high level how respondents prioritize the library's various functions.

There have been some shifts in the responses to this question between the 2010 and 2013 Library Surveys. Most notably, the percentage of respondents who rated research support for faculty members as "very important" declined from 85% to 68%. There was a decline in the share of directors who rated this function as important at all types of institutions, but the drop was smallest among doctoral institutions; 86% of respondents from doctoral institutions rated this function as very important in 2013, down from 95% in 2010. Other groups saw steeper declines. After the third cycle of the survey (anticipated for 2016), it will be possible to have more confidence in whether these data show evidence of long-term changes.

In the area of "information literacy," library directors' responses indicated a resounding dedication to undergraduate education at all types of institutions: 97% of respondents reported that helping undergraduates "develop research, critical analysis, and information literacy skills" is very important at their institution. As Figure 4 shows, this response was relatively even across all types of institutions. The shift between 2010 and 2013 resulted primarily from differences in the responses from directors at doctoral institutions. In 2010, 86% of respondents from that group rated this function as highly important, compared with 94% in 2013.

"How important to you is it that your college or university library provides each of the functions below or serves in the capacity listed below?" Percentage of respondents rating each as "very important," over time.
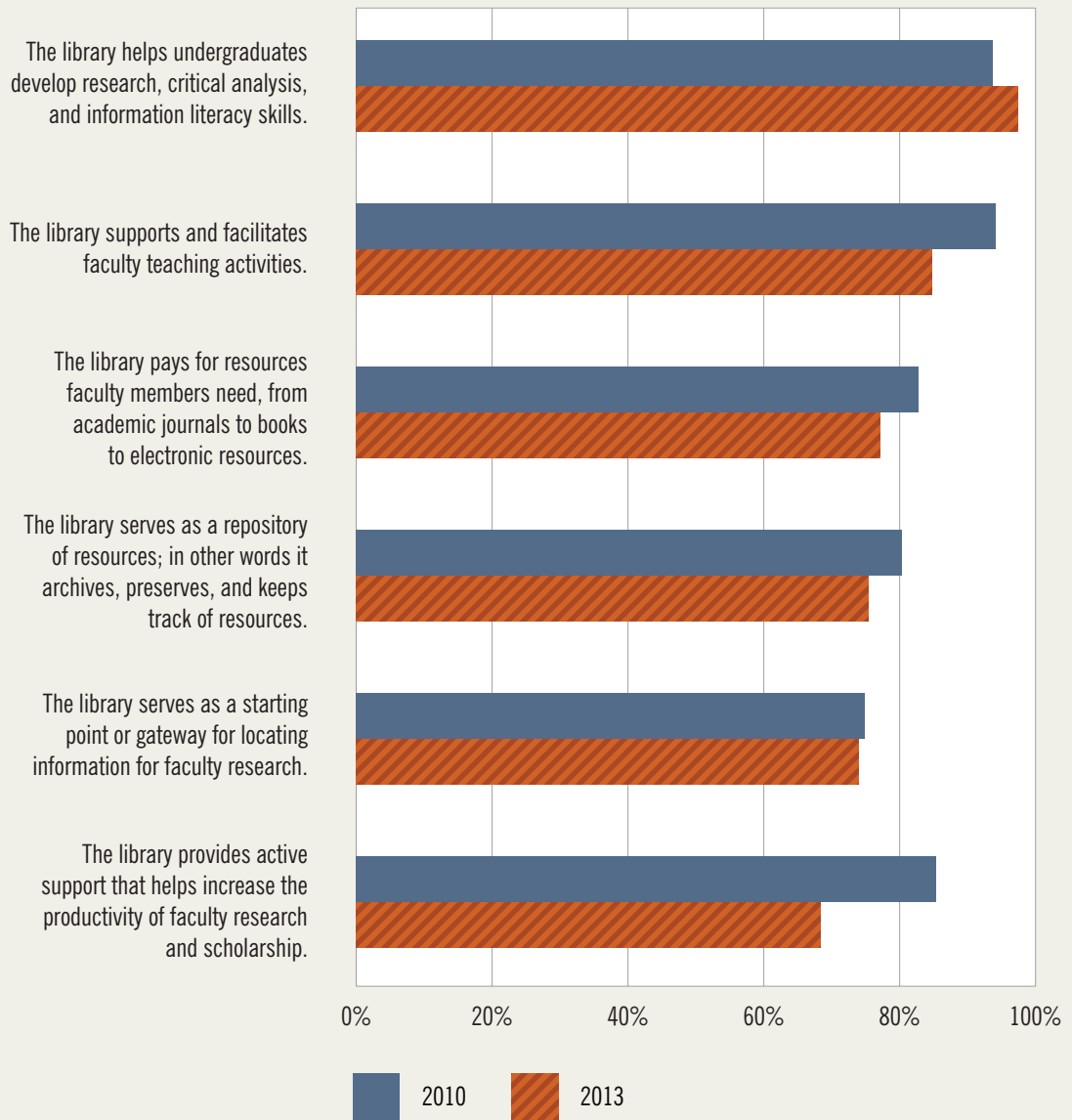
The differences among types of institutions were similar to those exhibited in the 2010 survey. In both surveys, a greater percentage of respondents from doctoral institutions rated the "research," "buyer," and "archive" roles as important. These ratings probably reflect the more significant role that some of these institutions take on in these areas. The responses on the "gateway" role, while consistent with the 2010 data, are more difficult to explain. As in the 2010 survey, a very slightly higher percentage of respondents from master's institutions rated the "gateway" role as very important than did respondents from other groups.

In almost all cases, the trends among each library type group mirrored the overall changes from 2010 to 2013; for example, the overall decline in the number of respondents rating the "teaching" role as important matched similar declines among baccalaureate, master's, and doctoral institutions. However, in two cases, doctoral institutions stood out from the overall trends. Slightly more respondents from doctoral institutions rated the "buyer" and "archive" functions as important in 2013 than in 2010. Among these respondents, the percentage who rated the "buyer" role as important increased from 86% to 90%, and the percentage who rated the "archive" role as important increased from 87% to 93%.

"How important to you is it that your college or university library provides each of the functions below or serves in the capacity listed below?" Percent age of respondents rating each as "very important," by institution type.
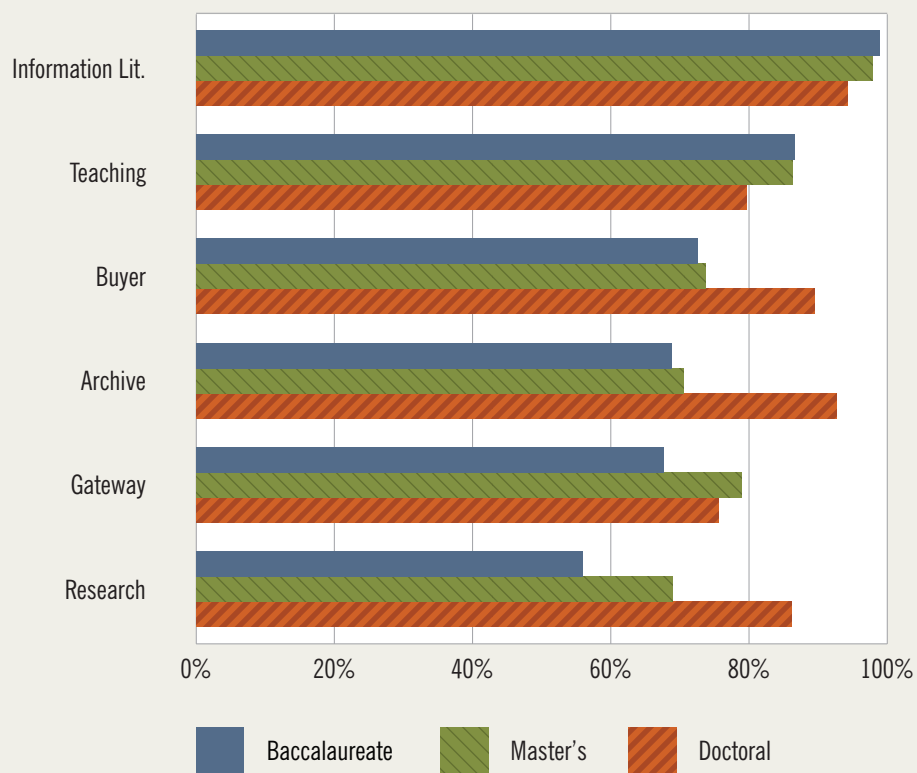

In the 2013 survey, we introduced a version of this question that asked library directors how they think their immediate supervisors prioritize the roles of the library. A consistently lower share of respondents believes that their direct supervisors value a given role than expresses value in it herself or himself.[3] There were some notable differences among types of institutions; on the whole, gaps in the perception of importance of various roles were much greater at doctoral institutions than at baccalaureate and master's institutions. A correlation matrix includ-

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3   Since we did not gather any data from any of the "immediate supervisors" to which this question refers, this question can only speak to the opinions of library directors.

ing the six pairs of items revealed that respondents' priorities are strongly and positively correlated with their perceptions regarding their direct supervisors' priorities. Respondents who rated a role as a high priority were significantly more likely to rate that role as a relatively high priority for their direct supervisor.[4]

"How important to you is it that your college or university library provides each of the functions below or serves in the capacity listed below?" Percentage of respondents rating each as "very important" compared with the number who reported that their immediate supervisor would rate it as "very important."

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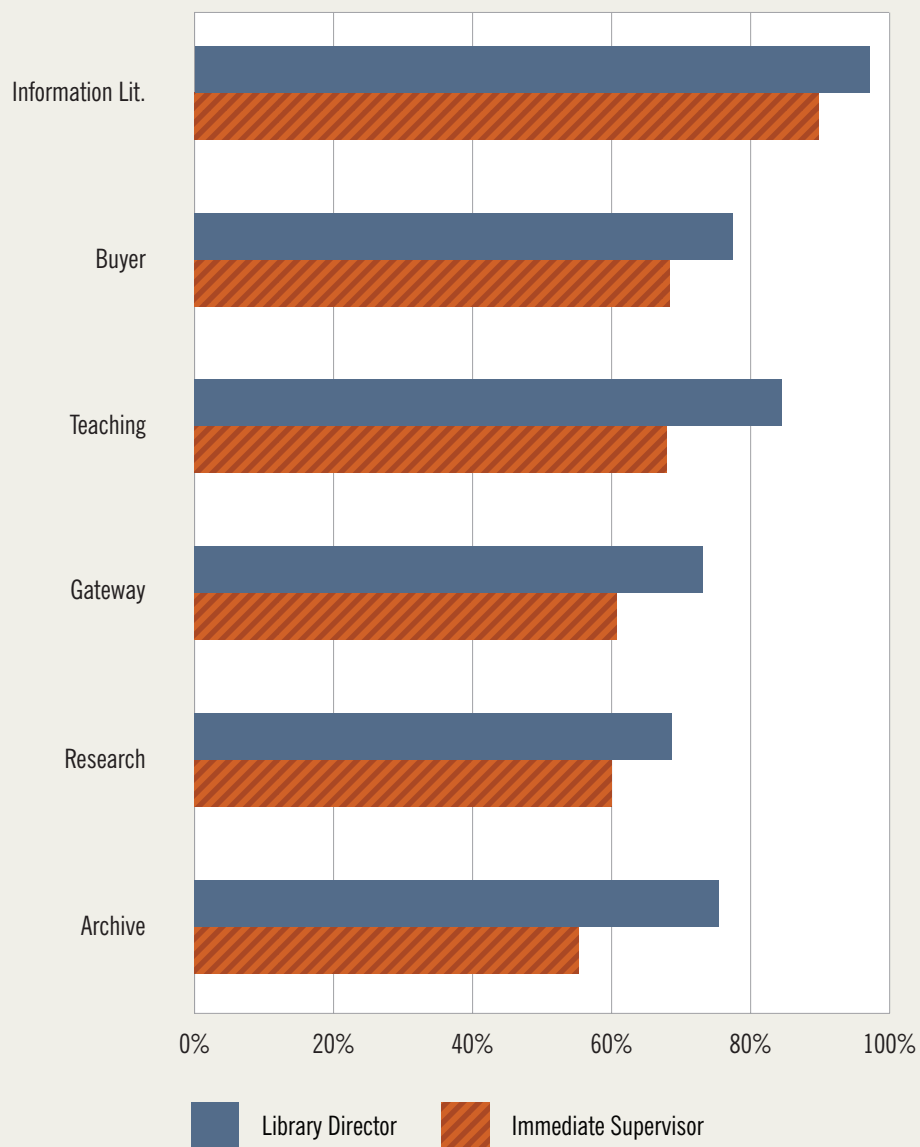
4   Correlation is used to determine the relationship between two variables, assuming linearity. The correlation matrix between the six pairs of questions (variables) resulted in r values ranging from .50 - .68 and p = 0.000 for all six correlations.

The area where there was the least difference in perceived priorities was the "information literacy" role, where library directors' own assessment of that role's uniform high importance matched their perceptions of the importance that their supervisors place on it. Among baccalaureate institutions, the data from the two questions was similarly matched on the "research" role.

For both baccalaureate and master's institutions, the area of the greatest perceived differences among library directors and their supervisors was the "archive" role. For example, 71% of library directors at master's institutions rated the archive function as "very important," while only 52% said that their immediate supervisors see it as very important. This may help to explain some of the challenges of generating resources for preservation at some types of institutions even if values favoring preservation were uniform across the library profession.

At doctoral institutions, where a higher percentage of library directors rated each role as very important, there were much greater differences between the share of library directors who rated each role as very important and the share of them that ascribed a perception of very important to their immediate supervisors. The largest gap was in the "teaching" role, which 80% of respondents from doctoral institutions rated as "very important," but which only 54% of respondents said was very important to their immediate supervisors. This may indicate that, while library directors at these institutions have focused an increasing number of their resources on undergraduates, they still think they are perceived of primarily as resources for research. Slightly smaller gaps existed for the archive and research roles.

Strategic Planning and Organizational Change

The survey included a variety of questions that touch on academic libraries' planning processes and their strategies for meeting the changing needs of scholars and students. The results show that library directors are, in the aggregate, slightly more confident in their plans to meet changing user needs than they were in 2010. However, library directors at almost all institutions still feel hampered by lack of money and staff, and this may seriously limit their ability to carry out new initiatives. Library planning processes vary widely by institution, but at many institutions they appear to be centered primarily on library staff.

FIGURE 6
"My library has a well-developed strategy to meet changing user needs and research habits." Percentage of respondents who strongly agreed, over time.
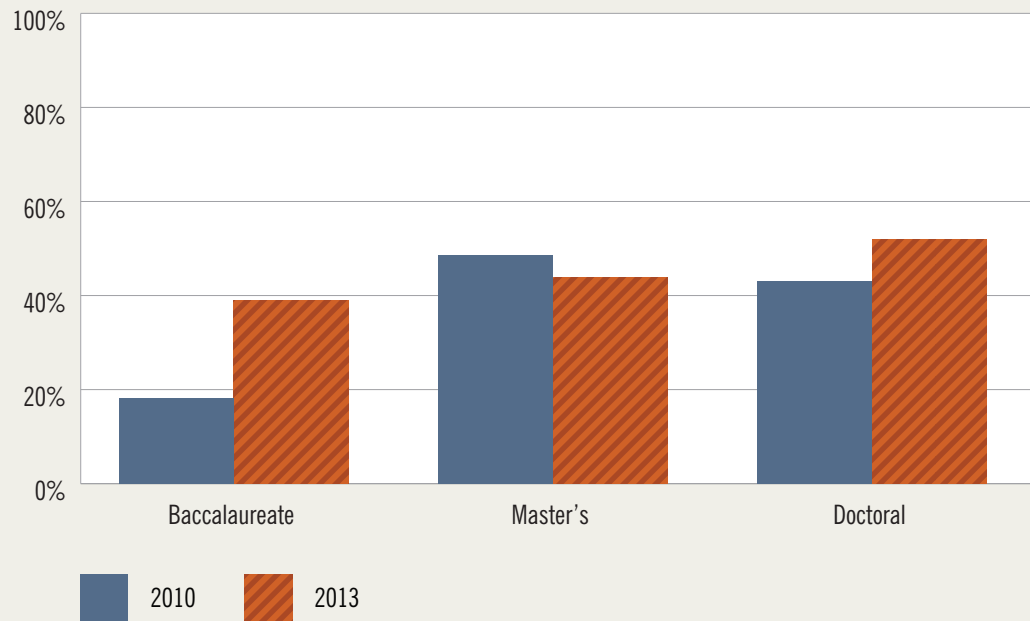

In 2010, we asked library directors to respond to the statement: "My library has a well-developed strategy to meet changing user needs and research habits." Many library directors neither strongly agreed nor disagreed with this statement. The statement was repeated in the 2013 survey, and there were some shifts in how respondents reacted to it, with a marked increase in the share agreeing strongly with the statement among baccalaureate respondents and a less conclusive pattern at the other institution types, as illustrated in Figure 6. It is difficult to account for the apparent discrepancies in the responses among types of institutions, and it is also unclear whether the changes between 2010 and 2013 are representative of long-term trends. We will continue to track the response to this statement in future cycles of the survey.

With many library directors expressing some ambivalence about their strategy to meet user needs, to what extent is this driven by a lack of strategy and to what extent by an insufficient understanding of changing user needs? In one question, we asked directors about the involvement of various constituencies in libraries' strategic planning processes. The full text of the question and the results are shown in Figure 7.[5] Respondents reported that library directors, librarians and other professionals, and other library staff are most closely involved with library planning at many institutions, followed by provosts and chief academic officers, who are of course the supervisors of many if not most library directors. Each of these four populations plays an important role at the institutions of more than

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5   This question used a seven-point, non-numerical scale (see methodology section).

half of respondents. The involvement of other individuals or groups outside the library (such as faculty members and students) varies widely by institution, with certain constituencies playing little role in library planning at some institutions.

"How involved is each of the following campus stakeholders in the development of your library's strategic priorities?" Percentage of respondents rating each group as very involved.
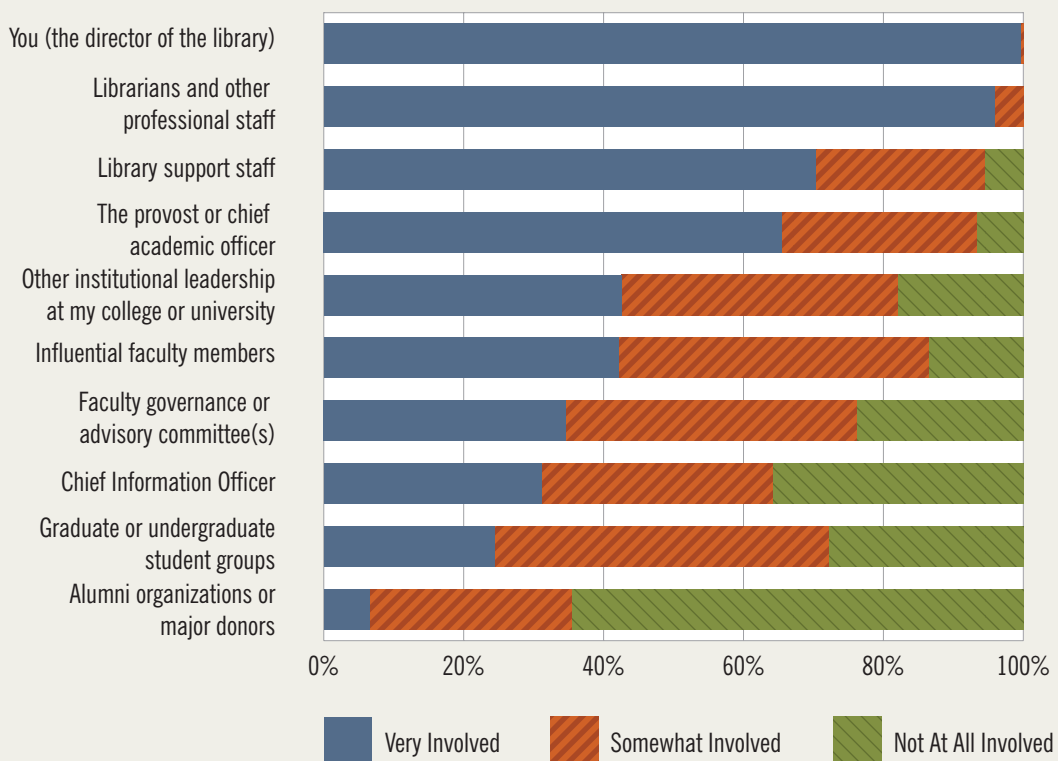

Leaders seeking to establish a "well developed strategy" require not only organizational priorities but also a variety of other resources that, when absent, may serve as real constraints. In recognition of this dynamic, we asked: "What are the primary constraints on your ability to make desired changes in your library?" Respondents could select up to three different items from a list of possible constraints, and for one of their three choices, they could select "other" and write in an item that did not already appear on the list. The full results are shown in Figure 8. The responses show that nearly 90% of library directors feel constrained by their lack of financial resources. The second most commonly selected item, "lack of staff skills in key areas," along with the responses to the "other" category, many of which made reference to insufficient staffing, point to the related issue of staff shortages and limitations.

"What are the primary constraints on your ability to make desired changes in your library? Please select up to three items that have the greatest impact at your institution, or leave the question blank if none of the items apply." Percentage of respondents selecting each item.
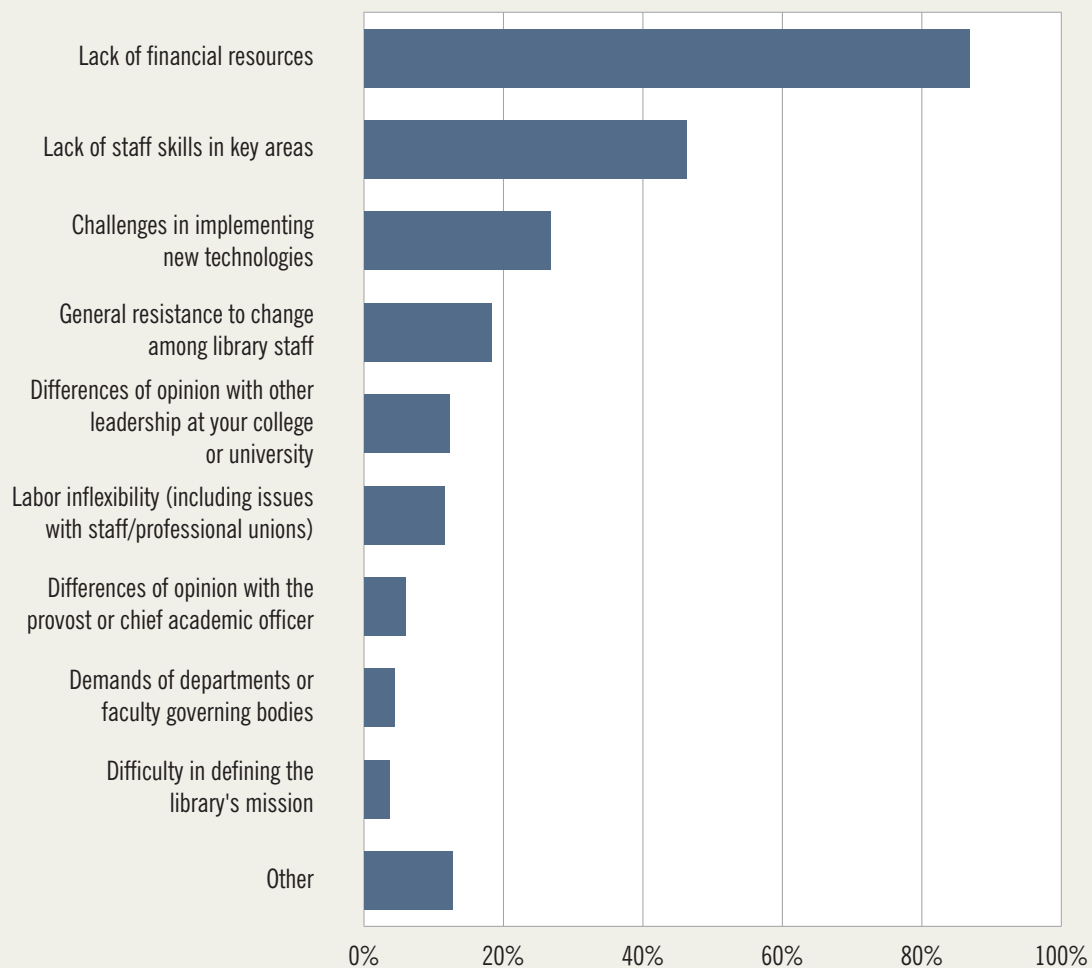
The differences among institutions of different types show the diversity among types of libraries on issues related to staffing. "Lack of staff skills in key areas" was selected by respondents from all types of institutions, but it appears to be much more of an issue at doctoral institutions: 58% of respondents from doctoral institutions selected this item, versus only 42% and 43% from baccalaureate and master's institutions, respectively. Labor inflexibility was primarily an issue at larger institutions, with 17% of doctoral institutions selecting this item. "General resistance to change among library staff" was selected by a striking 26% of respondents from master's institutions, compared with 20% at doctoral institutions and only 9% at baccalaureate institutions.

The comments that directors wrote in response to open-ended questions demonstrate some of the diversity among academic libraries in terms of their plans for the future. On one end of the spectrum, some respondents expressed the extreme

constraints under which they operate. One director wrote: "[It is] difficult to provide good information on some of the questions because they implied intent on our part. Our reality is dictated almost entirely by inadequate and declining staff and collections allocations." On the other hand, some directors reported that they have had the opportunity to innovate extensively in their libraries, especially in areas such as data management and preservation.

Incorporating Data into Decision-Making

Ithaka S+R used the survey to investigate how libraries gather, analyze, and use data in their decision-making at their institutions. There were several questions in the survey devoted to this theme. These questions were designed to transcend the category of "library assessment" and instead focus on the larger question of how directors use data to inform the changes that they make within their libraries. Respondents reported that they use a broad variety of methods to gather information about their libraries and their institutions. Most library directors believe that their data gathering activities are useful in informing a broad range of library activities, but there is a segment of directors that remains unhappy with their ability to deploy data effectively. Notably, many library directors do not think that their libraries' data gathering programs are helpful in advocating for increased funding.

First, we asked library directors to report what types of assessment they have done in the recent past. Figure 9 shows the percentages of respondents who reported that they had used each type of assessment or data gathering in the past two years. The data show some variation in data use across institution types, with more doctoral institutions indicating that they use each type of assessment than any other type of institution (in most cases). There has been almost no measurable change in the ways that libraries gather data since the 2010 survey.

We also asked library directors to rate how effective their data collection, analysis, and assessment activities have been in helping them accomplish a range of activities. The activities included items such as "deciding how to prioritize collections spending," "designing new library services," and "advocating for increased funding or grants." The full text of the question is included in Figure 10.[6] For almost all of the individual activities identified in the question, the percentage of library directors who reported that their data gathering has been effective ranged between 40% and 60%. There were some notable differences based on institution type: higher percentages of respondents from doctoral institutions reported that data is useful in configuring the library's physical space or designing new services, while higher percentages of respondents from master's institutions reported that data is useful in understanding patrons' needs and demonstrating the value of the library to administrators. The activity that stood out among the others in this question was "advocating for increased funding or grants." Library directors at all types of institutions reported that this was the area where data collection is least useful.

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6   This question used a seven-point, non-numerical scale (see methodology section).

FIGURE 9
"In the past 2 years, has your library regularly solicited feedback about services or collections from library users in any of the following ways? Please check all that apply." Percentage of respondents who selected each item, by institution type.
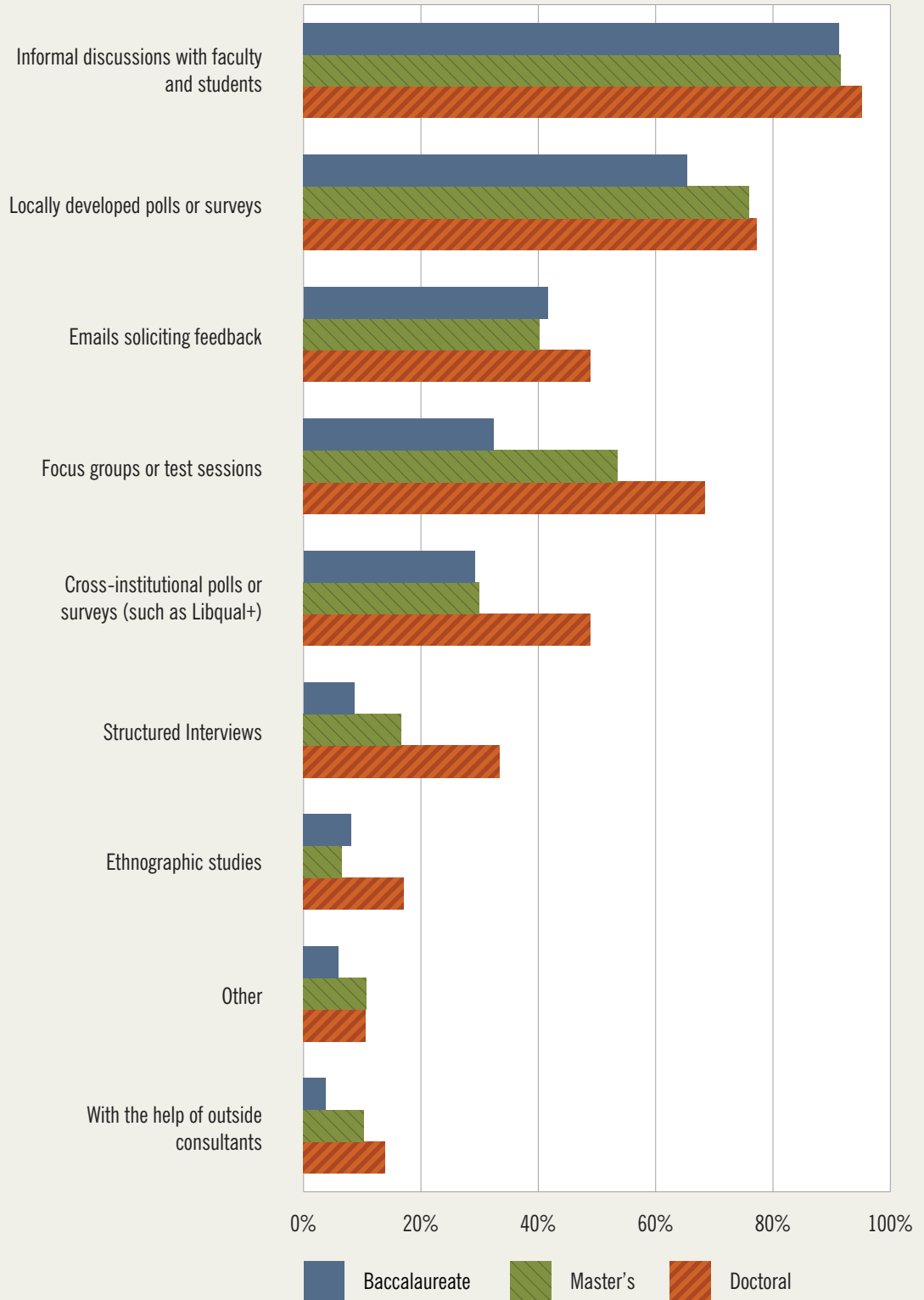
Interestingly, all six items in this question are positively correlated with the item: "My library has a well-developed strategy to meet changing user needs and research habits," shown in Figure 6 above.[7] This is compelling evidence suggesting that there may be a causal link between data-gathering and confidence in strategic planning. In addition, responses of "very effective" to each item in the question shown in Figure 10 were positively correlated with similar responses to each of the other items in the question. In other words, library directors who strongly agreed with this statement were more likely to rate each of the individual aspects of their assessment program as effective.[8] This suggests that library directors who are satisfied with one aspect of their assessment program tend to be similarly satisfied with its other aspects.

"How effective have your library's current data collection, analysis, and assessment activities been in helping you to do each of the following?" Percentage of respondents rating each item as very effective, by institution type.

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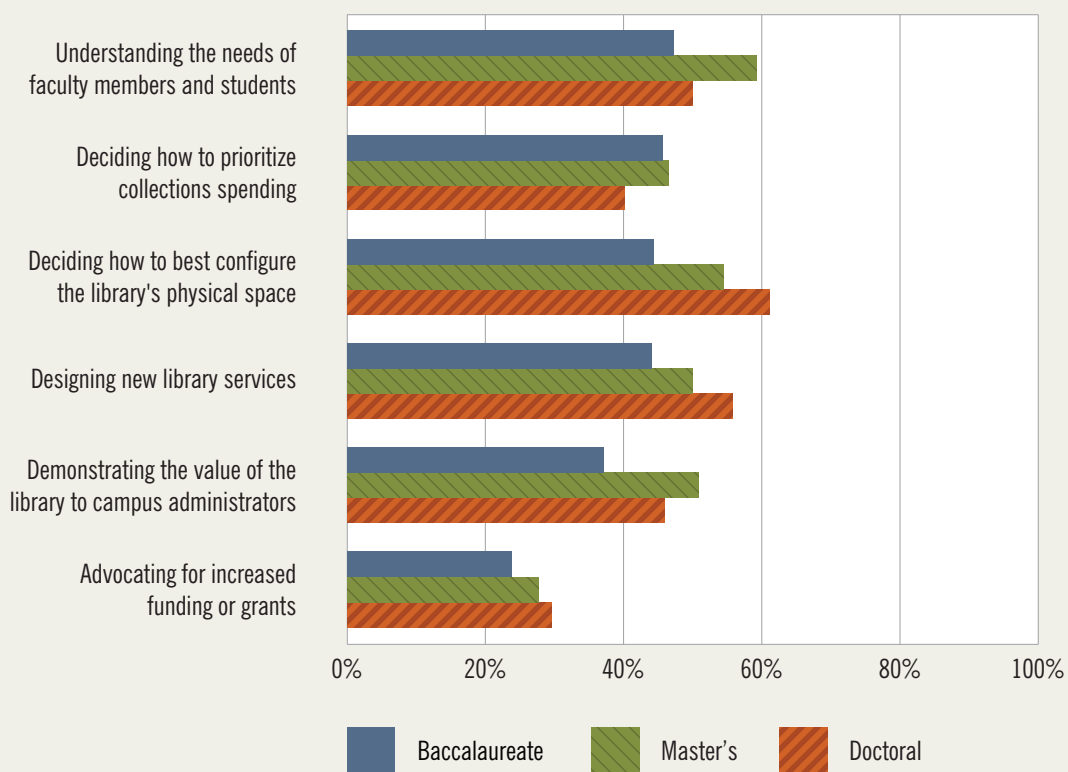
7   R values ranged from .19 - .44 for the correlations for each of these six items with the item: "My library has a well-developed strategy to meet changing user needs and research habits," with p = 0.000 for all correlations.
8   R values ranged from .34 - .56 for the correlations between each of these six items, with p = 0.000 for all correlations.
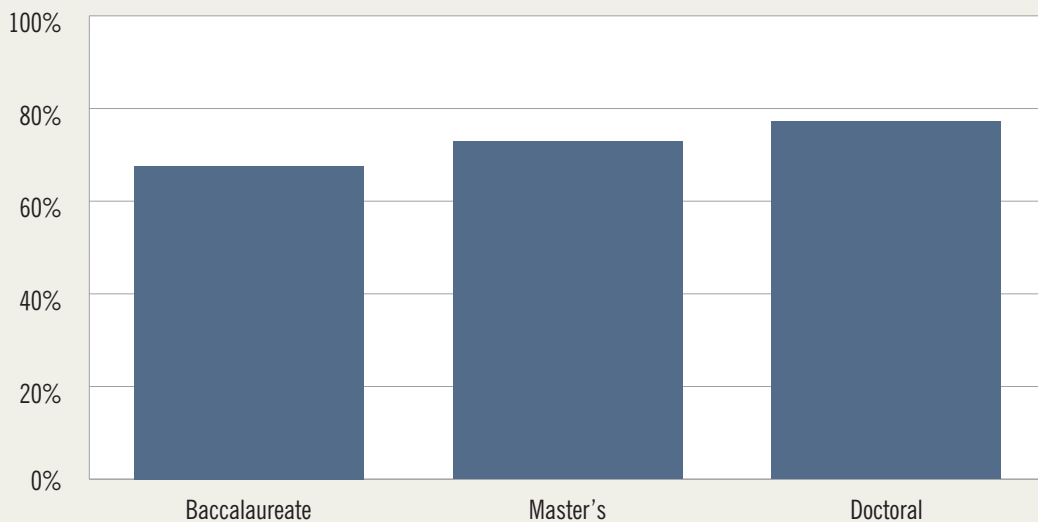
The Role of the Library Director

Issues of organizational strategy and constraints are also connected to the role of the library director as a manager and an institutional administrator. While regarding specific functions there was much overall alignment between the directors and their perceptions of their direct supervisors' views, we also investigated this issue in several other ways.

On several questions newly added in the 2013 cycle, library directors reported a relatively high level of alignment with their immediate supervisors. Respondents were presented with the statement: "My direct supervisor and I share the same vision for the library." Among respondents from baccalaureate institutions, 68% of respondents strongly agreed with this statement, and even higher percentages of respondents from master's and doctoral institutions strongly agreed. There was a positive and significant correlation between agreement with this statement and a perception that one's immediate supervisor places high value on the various roles of the library shown in Figure 5. [9]

FIGURE 11
"My direct supervisor and I share the same vision for the library." Percentage of respondents who strongly agreed.

Library directors at larger institutions reported greater affinity with the rest of the administrators at their college or university. Figure 12 shows the number of respondents who agreed with the statement: "I am considered by academic deans and other senior administrators to be a member of my institution's senior academic leadership." There is a substantial institution type pattern here, suggesting that the average director has a qualitatively different role at a baccalaureate

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9   R values ranged from .32 - .40 for the correlations between this statement and each of the six items shown in the question in Figure 5, with p = 0.000 for all six correlations.

institution than she or he would at a doctoral institution; it is not just a difference in scale of the operation and the importance of the research support responsibilities.

"I am considered by academic deans and other senior administrators to be a member of my institution's senior academic leadership." Percentage of respondents who strongly ageed.
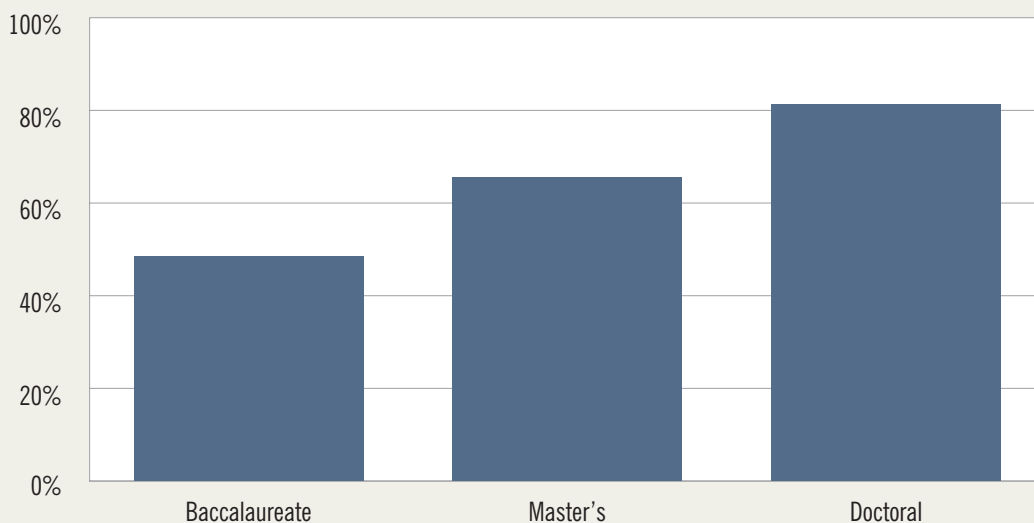
Finally, the survey explored the role of library directors in fundraising and development. Respondents' involvement in these areas varies widely based on the type of institution where they work, with directors at larger research institutions generally playing more of a role in fundraising. Figure 13 shows the percentage of their time that respondents reported that they devote to these activities. The average and the median together suggest that for a small share of directors at all types of institutions, but especially doctoral universities, the time devoted to these responsibilities is actually quite notable.

"Approximately what percentage of your time do you spend on fundraising and development activities?" Average and median responses, by institution type.

	Average	Median
Baccalaureate	5.2%	3.0%
Master's	7.0%	5.0%
Doctoral	16.0%	10.0%

Budgets and Staffing

The survey yielded data about budget and staffing priorities that offer an interesting point of comparison with the priorities library directors identified in the strategy questions described above. Respondents shared their top spending priorities and their plans for how they intend to change staffing in the near future.

Library directors' responses signaled the high value that they place on their staff and a general desire to increase hiring in the near future. Many library leaders indicated that they would like to spend newly available funding on staff positions or salary increases for existing staff. Many of their new hires are expected to be in emerging areas such as web services and digital preservation, rather than in more established areas such as reference, technical services, and print collections management, though each institution's staffing needs are highly specific. Directors at doctoral institutions foresee more widespread changes than those at master's and baccalaureate institutions. The responses support the idea that in library directors' views, human resources remain a foundational aspect of libraries' effective functioning. In fact, staff may be growing in importance relative to other major categories of expenses.
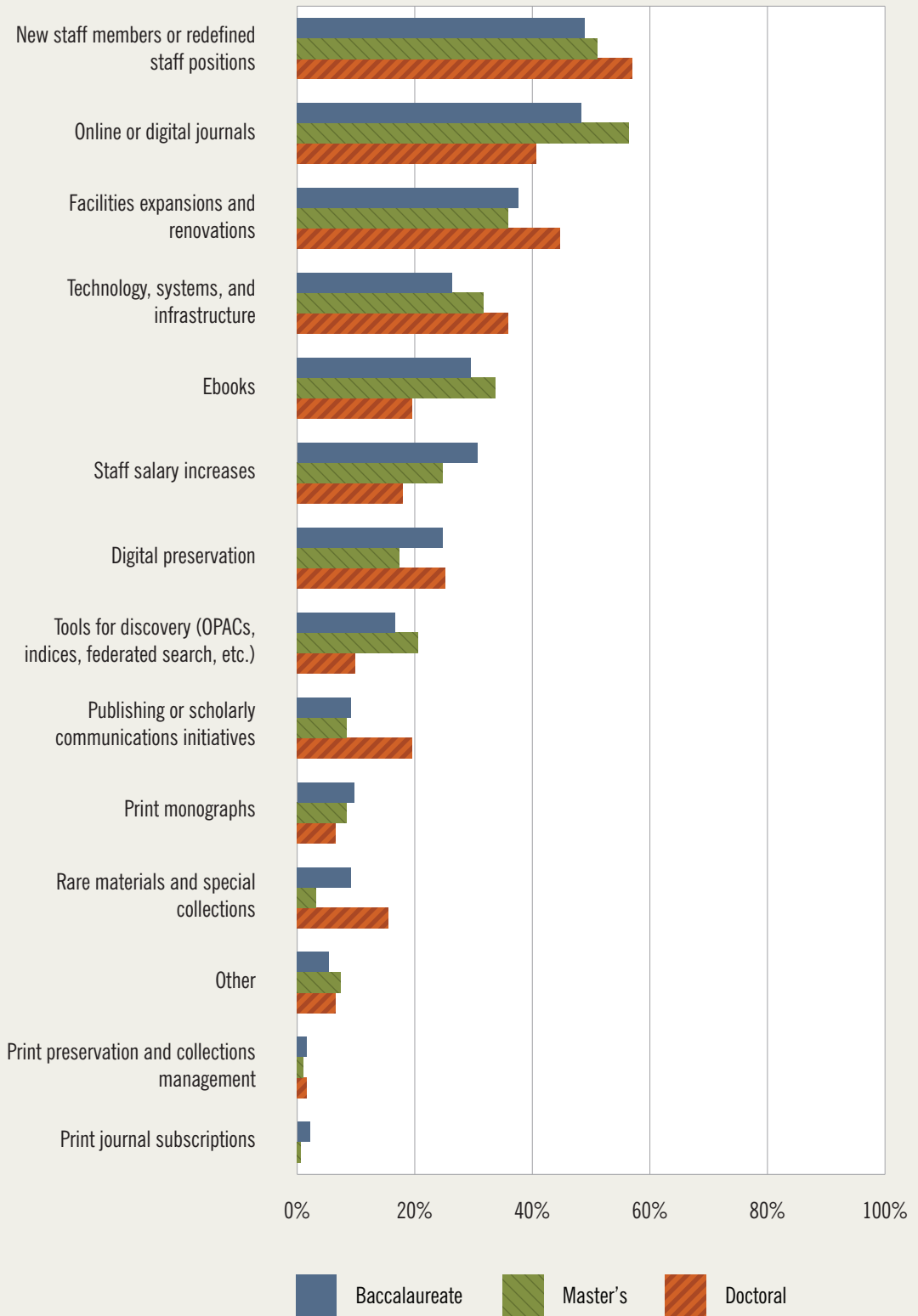
As shown above in the section on strategic planning, most directors of academic libraries feel constrained by budget pressures. Respondents identified a diverse array of areas where they would spend additional funds if they became available. Along with staffing, investing more money in online or digital content, including both journals and ebooks, was of strong interest at all types of libraries. However, the great diversity among different types of libraries is readily apparent in their different approaches to services and collections strategies. For example, many libraries (especially those at doctoral institutions) are placing greater emphasis on increasing staffing in special collections and building repository- or publishing-related services for faculty members.

Budget Increase Question

The questionnaire contains an item that, although unrealistic as a scenario for many academic libraries, is a useful tool for understanding leaders' attitudes towards resource allocation. In this question, we ask respondents to indicate how they would spend a budget increase of 10% relative to their currently expected funding for the upcoming year. The goal of this question is to determine how library directors wish to invest unclaimed resources, as a proxy for their perceptions of current limitations and prospective innovation investments. Respondents were asked to select up to three choices from a list of fourteen options. The full text of the question and the options available to respondents appear in Figure 14. There were several interesting themes that were evident in the data; these included, among others, a strong interest in investing in library staffing, ongoing needs to devote resources to building digital collections, a declining appetite for new investments in discovery tools, and an interest in physical and technological infrastructure.

FIGURE 14

"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 that you would invest in." Percentage of respondents who selected each item, by institution type.

Legend: Baccalaureate | Master's | Doctoral

Categories:
- New staff members or redefined staff positions
- Online or digital journals
- Facilities expansions and renovations
- Technology, systems, and infrastructure
- Ebooks
- Staff salary increases
- Digital preservation
- Tools for discovery (OPACs, indices, federated search, etc.)
- Publishing or scholarly communications initiatives
- Print monographs
- Rare materials and special collections
- Other
- Print preservation and collections management
- Print journal subscriptions

The results from this question illustrate a strong interest in investing more money in staff positions at all types of institutions; 52% of respondents said that they would invest the additional money in this area. In addition, a substantial percentage of respondents said that they would invest new money in staff salary increases. At baccalaureate institutions, where the share was highest, 31% of respondents said that they would spend additional money in this area. The need to invest in staff was underlined in comments left by a number of respondents. One library director wrote: "My library is significantly understaffed, so this limits what we can do to support faculty and students beyond the 'basics' of library instruction and reference/research consultation."[10]

In the area of "discovery tools," there was an incredible shift in the responses relative to a similar question in the 2010 survey. Then, 41% of respondents said that they would like to invest the additional money in tools for discovery, while in 2013 only 16% of respondents said they would like to invest more in this area. This may suggest that many of the libraries that wanted to make more investments in discovery systems and services have already done so, and thus the level of new spending in this area will level off or decline in the future. Interest remains stronger among master's and baccalaureate institutions than among doctoral institutions.

Many respondents said that they would invest additional funds in "facilities expansions and renovations" and "technology, systems, and infrastructure." A higher percentage of respondents from doctoral institutions selected these items than did respondents from other institutions.

At the same time, two areas often characterized as essential priorities for research libraries saw relatively modest shares of respondents prepared to prioritize them for new spending. Among doctoral institution respondents, 15% would allocate additional resources to acquiring rare materials and special collections while 19% would do so for publishing and scholarly communications services. As we will see, these areas are more likely to be supported via increased staffing than through direct spending.
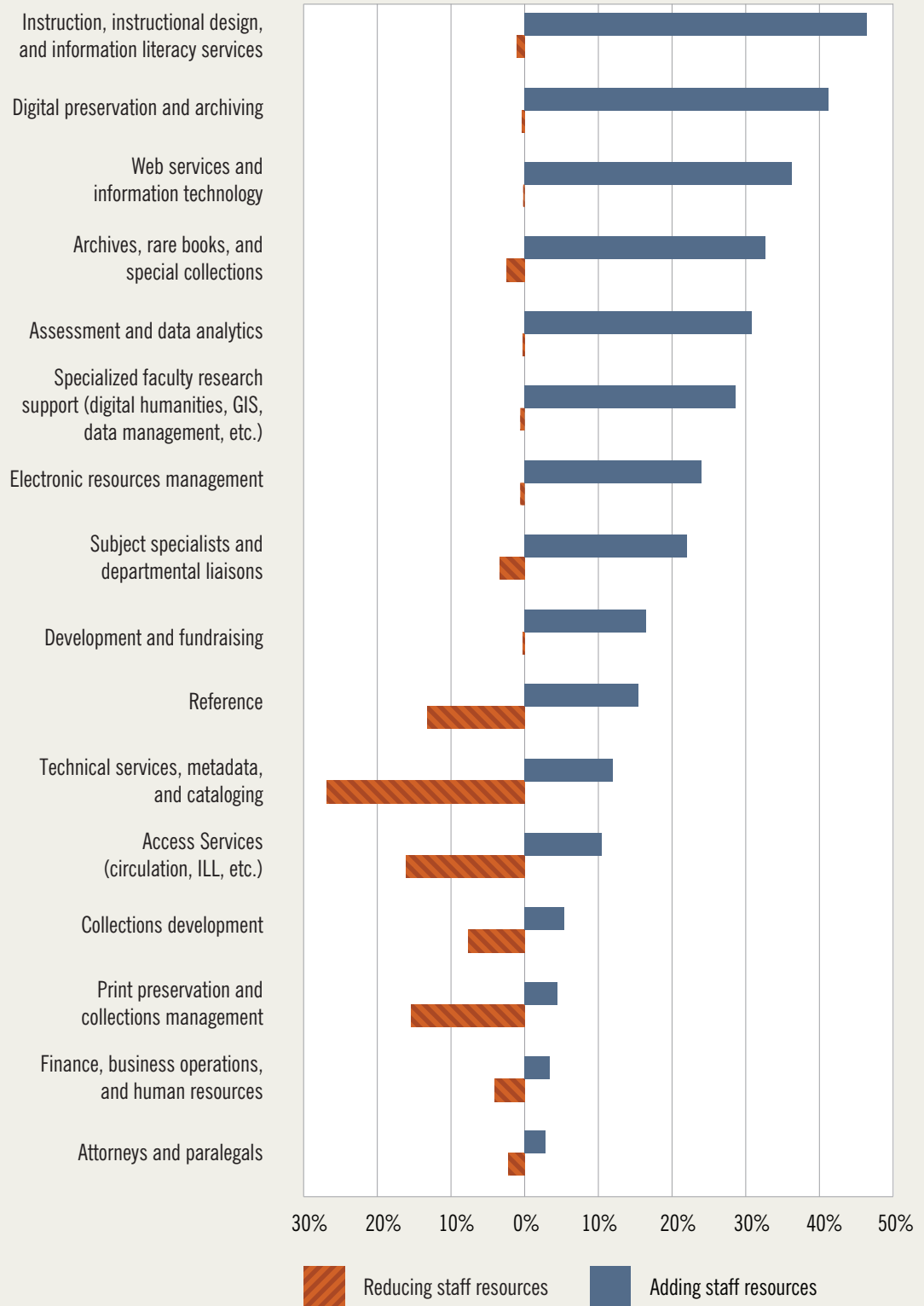
Staffing Priorities

The staffing question in the 2013 survey asked respondents to predict whether they would increase or decrease their staffing levels in a variety of areas. For each functional area, respondents had a choice of indicating whether they expected to add staff resources, make no change, or reduce staff resources. (The full text of the question is included in Figure 15.) Unlike the budget increase question above, this was not a hypothetical question, since it asked respondents to forecast changes that they think are likely to occur in the next five years. The results show a strong interest in increasing staffing levels in many comparably new or technology-related functions in the library, with some decreases foreseen in other areas, particularly those related to processing and managing print collections.

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10 This comment came in response to a question at the end of the survey that invited library directors to comment on any issue related to the survey.

FIGURE 15

"To the best of your knowledge, will your library add or reduce staff resources in any of the following areas over the next 5 years?" Percentages of respondents predicting reduction or addition of staff resources in each area.

Instruction, instructional design, and information literacy services

Digital preservation and archiving

Web services and information technology

Archives, rare books, and special collections

Assessment and data analytics

Specialized faculty research support (digital humanities, GIS, data management, etc.)

Electronic resources management

Subject specialists and departmental liaisons

Development and fundraising

Reference

Technical services, metadata, and cataloging

Access Services (circulation, ILL, etc.)

Collections development

Print preservation and collections management

Finance, business operations, and human resources

Attorneys and paralegals

30%   20%   10%   0%   10%   20%   30%   40%   50%

Reducing staff resources   Adding staff resources

Taken as a whole, respondents predicted increases in library staffing across many functional areas. "Instruction, instructional design, and information literacy services," "digital preservation and archiving," and "web services and information technology" led the way, with more than a third of respondents predicting that they would increase staffing in each of these areas. While there may in fact be a period of increased hiring on the horizon, it is important to note that the question does not provide any information about the magnitude of the changes that have been predicted, only the share of respondents whose institutions might make changes. The data provide only one way of looking at how staff resources are allocated, so their predictive power should not be overestimated.

There were some substantial variations in responses across types of institutions. These differences reflect not only the disparate needs of different types of institutions, but also the differing dynamics of managing a very large organization versus managing a very limited number of staff members. For the top item, "instruction, instructional design, and information literacy services," master's institutions had a slight lead over other institutions; 53% of respondents from this group indicated that they would increase staffing in this area, compared with 44% of respondents from doctoral institutions and 42% of respondents from baccalaureate institutions.

In most of the areas listed, more library directors from doctoral institutions predicted that they would increase staff over the next five years than did respondents from other types of institutions. Directors from doctoral institutions led the way in the next five of the top six categories shown in Figure 15. Among these respondents, 61% said that they would add staff in digital preservation and 62% said that they would add staff in specialized faculty research support, versus 35% and 23% of respondents from master's institutions, the institutional type with the next highest percentage response. High percentages of respondents from doctoral institutions also predicted increases in staffing in special collections (46%, versus 30% among baccalaureate institutions, the group with the second highest response), web services and information technology (58%, versus 32% among master's institutions, the group with the second highest response), and assessment and data analytics (50%, versus 27% among master's institutions, the group with the second highest response).

There were three functions where there were substantially more respondents who predicted that they would decrease staffing than there were respondents who said that they would increase staffing: technical services, metadata, and cataloging; access services (circulation, ILL, etc.); and print preservation and collections management. Again, more respondents from doctoral institutions predicted changes here than did respondents from other types of institutions. Among directors from doctoral institutions, large percentages said that they would decrease their staffing in technical services (35%), access services (33%), print preservation (20%), and reference (28%).

Undergraduates and Information Literacy

As shown above in the section on the role of the library, almost all respondents rated the library's role in helping students develop "research, critical analysis, and information literacy skills" as very important. The survey included a set of questions that further explored library services as they relate to this role. In particular, we asked about the perceptions of academic libraries' roles in information literacy education and the specific services that they offer to support undergraduates.

Beyond some very basic core library functions such as classroom instruction, the services that libraries offer to support undergraduates vary widely by institution. We tried to capture some data about a handful of these services, and the results show some of the diversity in libraries' services strategies. The survey placed an emphasis on services for online courses, an area where many libraries do not yet feel confident that they can provide a rich set of services.

While many library directors identify information literacy and instruction as a core part of their libraries' missions, comparisons to the 2012 Faculty Survey show that faculty members are much less likely to think of this as an important role for the library. The causes and the implications of this gap in perceptions are complex, and the survey data can only go so far in explaining them. The results below provide a starting point for discussions about perceptions of the library.

Undergraduate Services and Online Learning

The survey included questions about a variety of specific services related to undergraduates and online courses. Many of these appeared as items within the "library functions" question, in which we asked respondents to rate the priority that their institutions give to a variety of specific library functions. The list of 24 functions that they rated was a non-comprehensive selection of academic libraries' activities.[11] Figure 16 shows the items from that question that were related directly to teaching and learning.

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11   The full results of this question can be seen in Appendix I. This question used a seven-point scale.

"How much of a priority is each of the following functions in your library?" Percentage of respondents rating each a high priority, by institution type.
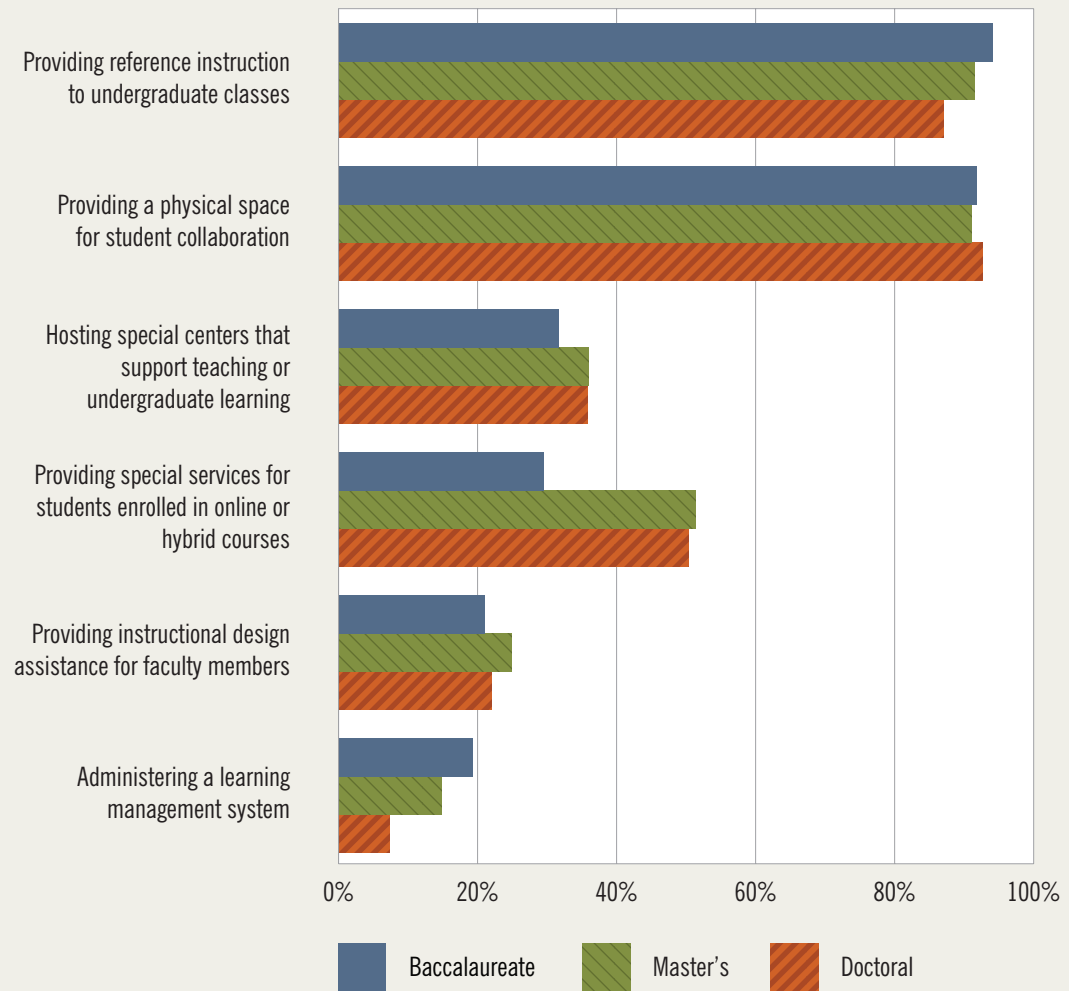

The results from this question underscore the uniformly high value that library directors place on the academic library's role in at least certain aspects of undergraduate education. Among all 24 items in the library functions question, the two that were rated as a high priority by the largest percentage of respondents were "providing reference instruction to undergraduate classes" and "providing a physical space for student collaboration." The response to these questions was roughly similar at all types of institutions.

Some other types of library services for serving undergraduates are slightly less widespread. The responses to each of these items demonstrate the diverse approaches that individual academic libraries are taking to providing support for undergraduate education. None of these particular models represents the dominant approach at this time. For example, about a third of respondents from each institutional type group rated "hosting special centers that support teaching or

undergraduate learning" as a high priority. Similarly, about 20% or less of library directors said that providing instructional design assistance or administering a learning management system is a high priority in their libraries.

About half of respondents from doctoral and master's institutions (and far fewer from baccalaureate institutions) said that they place a high priority on "providing special services for students enrolled in online or hybrid courses." These ratings must be placed in context of the number of institutions that offer such courses. Among baccalaureate institutions, 62% of respondents said that their institutions offer some form of online course, compared with 87% of respondents from master's institutions and 94% of respondents from doctoral institutions. Thus, only a fraction of libraries at institutions with one or more online courses have prioritized special services for students in those courses. This may reflect the fact that at some colleges and universities online learning has come to occupy a much more central role in instruction than at other institutions.

"My library is fully prepared to support students who are enrolled in our institution's online classes." Percentage of respondents who strongly agreed. (Base: institutions with online course offerings.)*
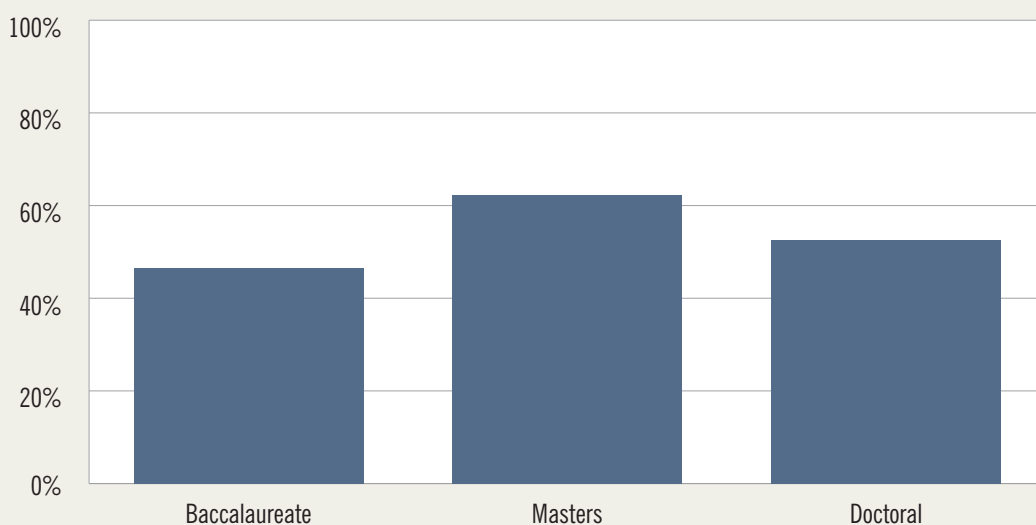

*This question was asked only of respondents who answered "yes" to the following question: "In addition to traditional face-to-face courses, some institutions now offer a variety of online education models, such as fully online credit-bearing courses, hybrid credit-bearing courses that include a mix of face-to-face and online instruction, and massive open online courses (MOOCs). Does your institution offer any online courses that fall into any of these categories?"

To those respondents who identified their institutions as having online course offerings, we presented the following statement: "My library is fully prepared to support students who are enrolled in our institution's online classes." The results are shown in Figure 17. Library directors' perceptions of readiness to support online learners are mixed, with substantial percentages of respondents indicating that they do not strongly agree with this statement.

The Library's Role in Undergraduate Education

As a group, library directors exhibited a strong sense of responsibility for teaching information literacy skills, though not all faculty members think of this as part of the role of the library. The 2013 survey included a number of strongly worded statements that address the issue of who holds responsibility for developing undergraduates' research skills. These questions either matched or closely replicated a series of questions from the 2012 Faculty Survey. These questions were posed in the form of statements, and respondents were asked about the extent to which they agree or disagree with each statement. In 2012, 22% of faculty members agreed with the statement: "Developing the research skills of undergraduate students related to locating and evaluating scholarly information is principally my library's responsibility." (See Figure 18. Note that in both Figure 18 and Figure 19, "blank" bars indicate that a question was not asked on one survey or another.) Among library directors, 72% of respondents agreed with this statement.

Percentage of respondents agreeing with each statement.
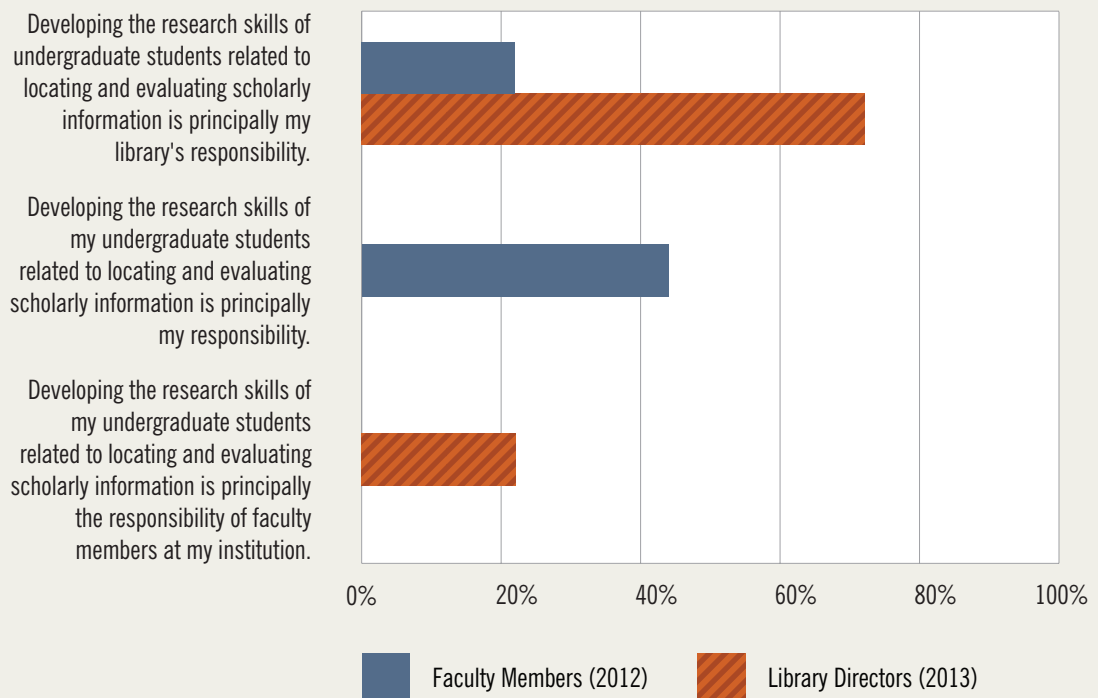
On the other hand, we also asked faculty members about their own role in developing students' research skills. In the Faculty Survey, 44% of respondents agreed with the statement: "Developing the research skills of my undergraduate students related to locating and evaluating scholarly information is principally my responsibility." In the Library Survey, 22% of respondents agreed with the similar statement: "Developing the research skills of my undergraduate students related to locating and evaluating scholarly information is principally the responsibility of faculty members at my institution."[12]
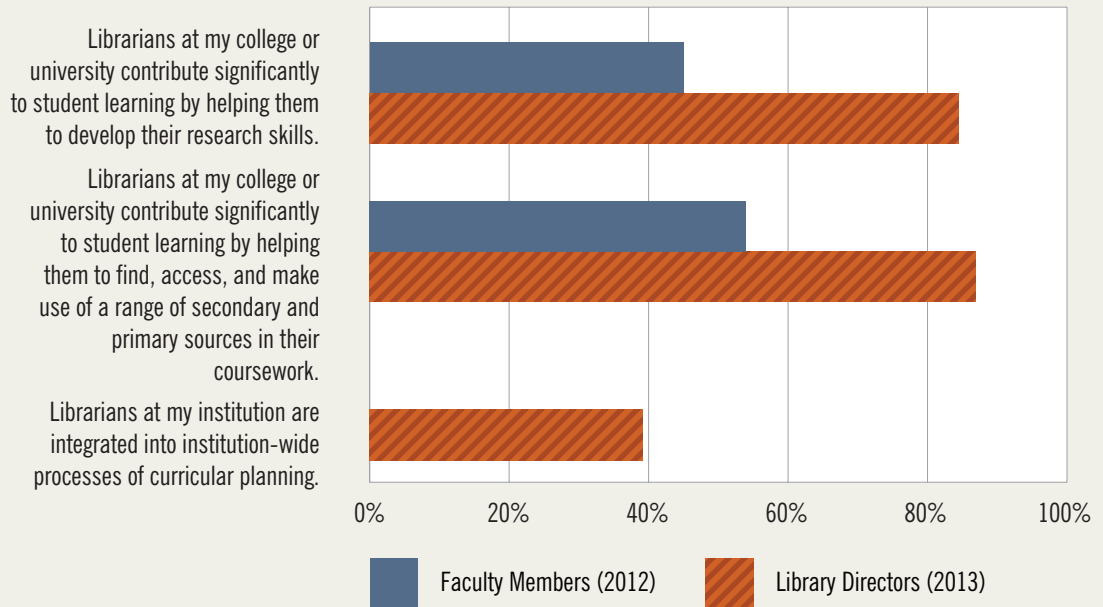
Several other statements revealed further differences among faculty members and library directors in their opinions of the impact that that libraries have on developing students' information literacy skills. As Figure 19 shows, there were significant differences in the percentages of library directors and faculty members who agreed that librarians help students to "develop their research skills" and help them "make use of a range of secondary and primary sources in their coursework." Faculty members were much less likely to agree with these statements than were library directors.

The final item in Figure 19 shows the percentage of library directors who agreed that librarians at their institutions are "integrated into institution-wide processes of curricular planning." Fewer than 40% of directors agreed with this statement. This response seems to indicate that, at least at some institutions, library directors do not feel that they are working in concert with the rest of their institutions in the area of undergraduate education. Unfortunately, the statement gives little insight into whether library directors are satisfied or dissatisfied with their current role in curricular planning.

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12 The juxtaposition of the Faculty Survey and Library Survey data in this case must be approached with caution. There are significant differences in wording and in the scope of the question—library directors were asked about all of the students at their institution, while faculty members were only asked about the students that they personally teach.

FIGURE 19

Percentage of respondents agreeing with each statement.

Librarians at my college or university contribute significantly to student learning by helping them to develop their research skills.

Librarians at my college or university contribute significantly to student learning by helping them to find, access, and make use of a range of secondary and primary sources in their coursework.

Librarians at my institution are integrated into institution-wide processes of curricular planning.

Faculty Members (2012)   Library Directors (2013)

Collections

The survey data provide a window into the creative and ever-changing strategies with which academic libraries approach the management and development of their collections. Respondents point to a future where academic libraries rely more on both electronic materials, but where they also develop rich collaborative agreements with other libraries. Some library directors at all types of institutions are placing less emphasis on building local print book collections for research and are instead looking to other ways of providing the materials that scholars need. As individual libraries tend to shape collections to serve their users, their individual choices may have real implications for the larger picture of preservation and access for scholars and students.

Library directors reported that they are decreasing the percentages of their budgets that they spend on print materials in favor of ebooks and digital journals, and they predicted that this shift will continue for the foreseeable future. As shown above in the section on budgets, many library leaders want to invest in more digital content in the near future. However, the format shift from print books to ebooks appears to be occurring at a measured pace, with relatively small projected increases on ebook spending during the next five years. Moreover, library directors' opinions about the importance of ebooks in their libraries have not measurably changed over the past three years.

There are several areas where library directors' and faculty members' opinions about collections management policies diverge at least to some degree. Library directors tend to be more comfortable than are faculty members in measurements regarding a print to electronic transition for scholarly journals. With respect to books, however, library directors may if anything be less aggressive in moving towards electronic formats than are faculty members. While making these comparisons is somewhat crude, it suggests some possible considerations for library leaders in how to balance user attitudes and practices against their own perspectives.

Collections Strategies

The responses to questions about collections strategies gave evidence of dramatic changes in the way that library directors think about their collections, while at the same time they highlighted the divergent approaches that various types of libraries are taking to collections management. The data from the "library priorities" question shown in Figure 20, along with some of the strongly worded statements from throughout the survey, highlight a number of major themes: the diversity of libraries' collections strategies, the growing interdependence of academic libraries, and the decline in the perceived importance of print book and journal collections.

FIGURE 20

"How much of a priority is each of the following functions in your library?" Percentage of respondents rating each a high priority, by institution type.
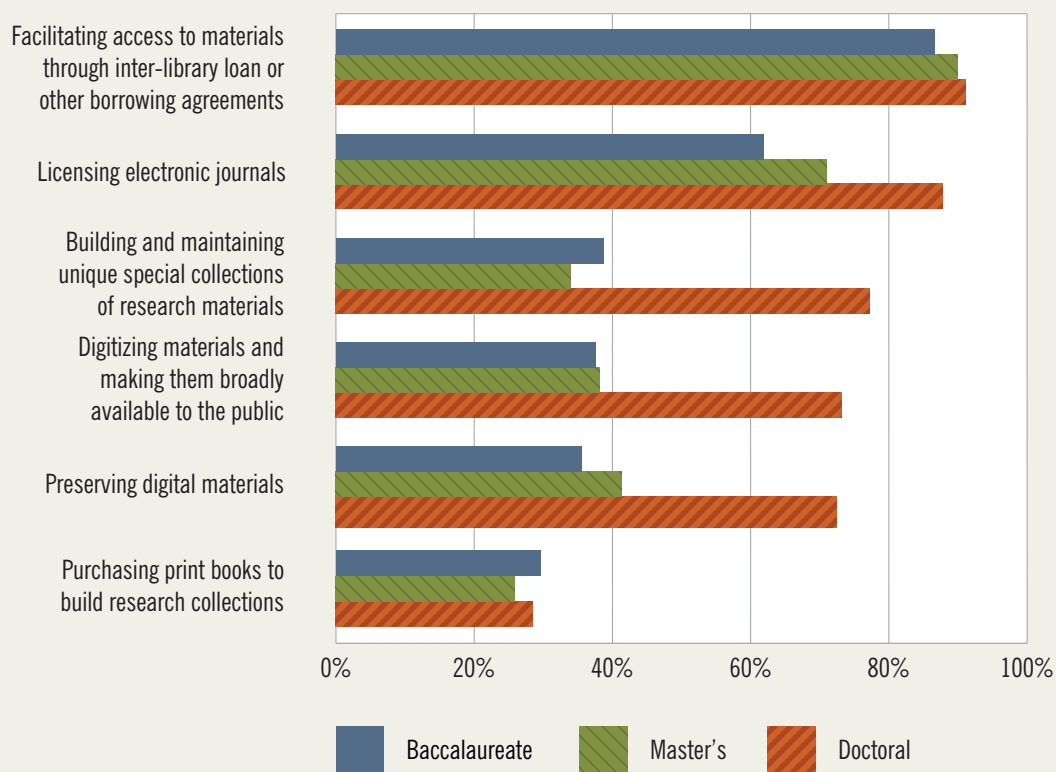

Figure 20 shows some of the divergent collections strategies at academic libraries. In particular, it demonstrates that many doctoral institutions are focusing on special collections, digitization, and digital preservation. About three quarters of respondents from doctoral institutions rated "building and maintaining unique special collections of research materials," "digitizing materials and making them broadly available to the public," and "preserving digital materials" each as very important. Far smaller shares of baccalaureate and master's institutions rated these items as very important. There is also a smaller but potentially important discrepancy in the level of importance that respondents from different institutional types assign to licensing electronic journals. Perhaps at smaller institutions, the scientific research infrastructure is less likely to be as well established, or alternatively perhaps licenses to electronic journals re less likely to be readily available.

Several pieces of data from the survey point to the increasing collaboration among libraries leading to growing interdependence of library collections. As shown in Figure 20, around 90% of respondents reported that facilitating access to material through ILL or other borrowing agreements is a very important priority. This made ILL and services like it one of the highest priority items at all types of libraries. In the strongly worded statement whose results are shown

in Figure 21, nearly 80% of respondents from doctoral institutions agreed that they rely increasingly on collaborative agreements to fulfill users' needs for materials. Smaller shares of respondents from other types of institutions also agreed with this statement. On a separate question about collaboration, 70% of respondents said that they are engaged in "shared borrowing agreements other than ILL." Moreover, 36% of all respondents (50% of respondents from doctoral institutions) said that they were engaged in "formal collaborative agreements on collections development," and 51% of all respondents (74% of respondents from doctoral institutions) said that they were engaged in informal collaborative collections development.[13]

"My library increasingly relies on collaborative relationships with other libraries to fulfill our users' needs for materials." Percentage of respondents who strongly agreed.
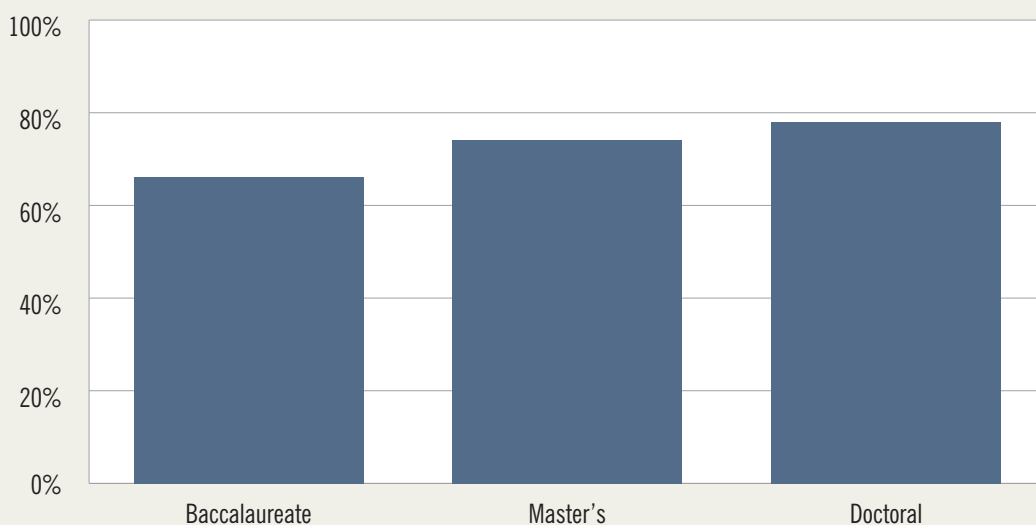
There is ample evidence that library directors' opinions about print collections are changing over time; a large majority of respondents agreed with the idea that building local physical collections is less important than it used to be. Figure 22 shows the responses to the statement: "Building our local print collections is much less important than it was 5 years ago." This question was new, so there is no comparative data from 2010. Response patterns to this question align with responses about the importance of "purchasing print books to build research collections," shown in Figure 20 above. Fewer than 30% reported that this was a very important function of their library.

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13 The full text of this question was "Have you established any of the following types of collaborative agreements with other libraries through bilateral agreements, library systems, or consortia?" Respondents selected "yes" or "no" for each item on a list.

"Building our local print collections is much less important than it was 5 years ago." Percentage of respondents who strongly agreed.

Strongly Disagree — Neither Agree nor Disagree — Strongly Agree
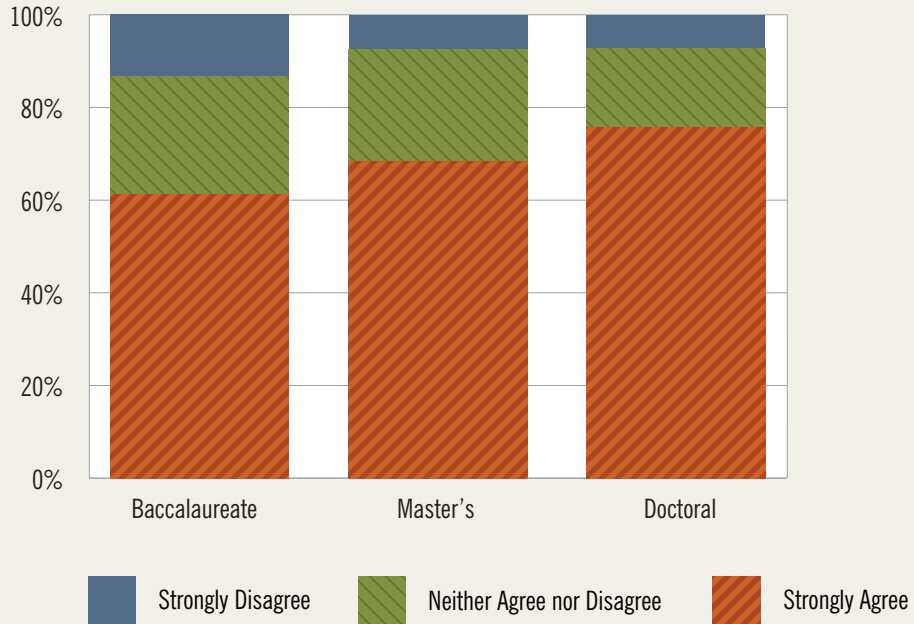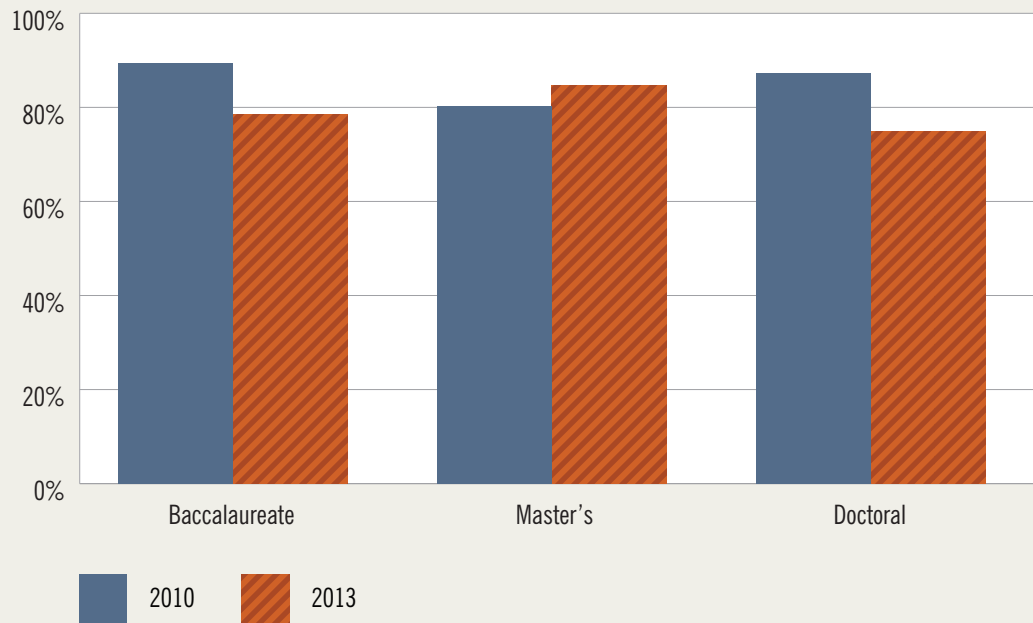
"My library will become increasingly dependent upon externally-provided electronic research resources in the future." Percentage of respondents who strongly agreed, over time.

2010 — 2013

Finally, Figure 23 shows the percentage of respondents who agreed with the statement: "My library will become increasingly dependent upon externally-provided electronic research resources in the future." While the overall level of agreement with this statement remained high, in 2013 there were some shifts in the percentage of each subgroup who agreed with this statement. It is unclear whether these shifts are minor fluctuations, or part of long-term trends, but anecdotally some library leaders reported being as dependent as they can imagine becoming on externally provided resources, which may suggest a plateau or decline in the foreseeable future.

Collections Spending

In both 2010 and 2013, we posed the following question to library directors: "What percentage of your library's materials budget is spent on the following items?" Respondents allocated various percentages to five different options: print books, print journals, electronic journals, ebooks, and "all other items," such that their answers added up to 100% of their materials budgets. In addition, we asked them to predict how these numbers would change over the next five years. The results showed clear trends toward the steady increase in the share of budgets spent on digital materials, including both electronic journals and ebooks.

Since we asked library directors to estimate the breakdown of their budgets, there are limitations to how the resulting data can be interpreted. This question measures library directors' perceptions about their organizations' own spending, rather than their libraries' actual spending statistics. We believe that these data about directors' attitudes have their own independent value, because they show how respondents understand their own spending.

Library directors' estimates about the breakdown of their budgets vary substantially based on their institutional type. Figure 24 shows respondents' 2013 spending estimates. Most notably, respondents from doctoral institutions estimated that they spend a larger percentage of their budget on digital journals, while baccalaureate and master's institutions reported that they spend a larger percentage on print journals and books.

FIGURE 24

"What percentage of your library's materials budget is spent on the following items?" Average of percentages estimated by respondents, by institution type.
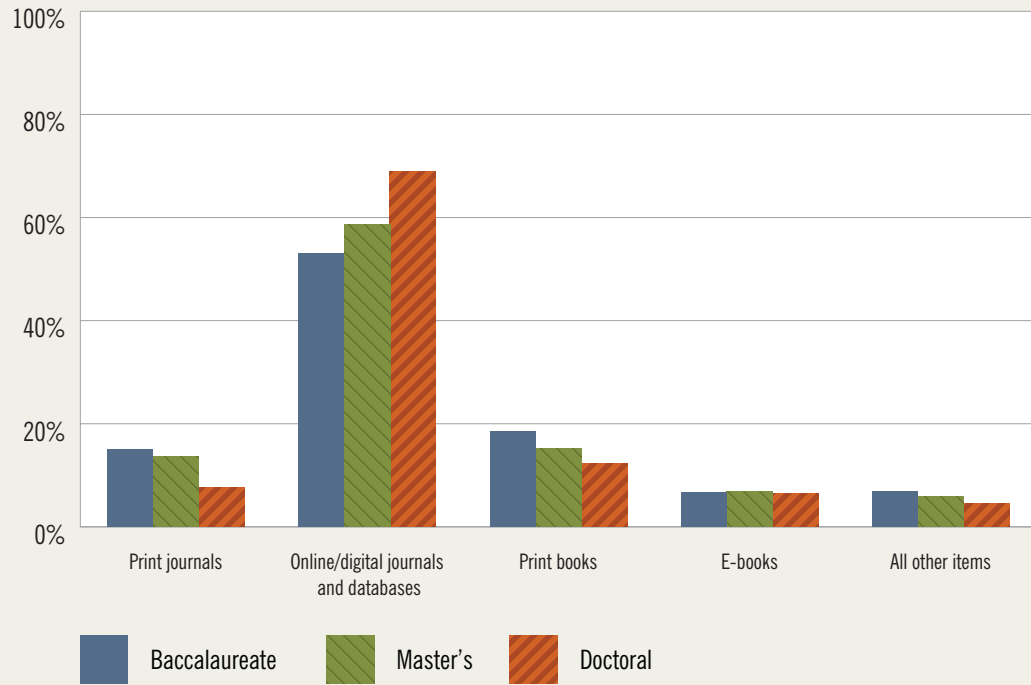
Since Ithaka S+R asked both of these budget questions in both 2010 and 2013, there are now four data points for comparison: library directors' estimated spending breakdowns for both years, along with their predictions for 2015 (from the 2010 survey) and 2018 (from the 2013 survey). Figure 25 shows the answers from all four questions on a single graph.[14] In 2013, library director's estimates have made progress toward what they predicted for 2015; the percentage of money they think they spend on digital journals and ebooks has increased, with corresponding declines in the percentages spent on print materials. Moreover, respondents' predictions for 2018 indicate that this trend is likely to continue for the foreseeable future. The percentage of materials budgets that library directors intend to spend on "all other items," including items bound for special collections, remains relatively flat over time.

Findings on this item were consistent with the views expressed about desired future investments as seen in Figure 14 above.

Averages of budget estimates and predictions. (2010 estimate and 2015 prediction data are from the 2010 survey, while 2013 estimate and 2018 prediction data are from the 2013 survey.)*

2010 Survey - Current Estimate

2010 Survey - Prediction for 2015

2013 Survey - Current Estimate

2013 Survey - Prediction for 2018

*These are the averages of responses to the questions: "What percentage of your library's materials budget is spent on the following items?" and "In five years, what percentage of your library's materials budget do you estimate will be spent on the following items?"

14 We have not shown the breakdown by institution type here because the directional trends over time among each subgroup match the overall trends.

Books

Library directors appear to be taking a relatively cautious stance toward the role of ebooks in collections. Respondents' attitudes toward ebooks have changed little since 2010.[15] Figure 26 shows that there has only been a very slight increase in the percentage of library directors who believe that ebooks play an important role in the research and teaching at their institutions. The response of faculty members to a similar statement in the 2012 Faculty Survey was markedly different. The discrepancy between faculty members and library directors can likely be at least partially accounted for by the differences in the wording of the two statements. [16]

"Electronic versions of scholarly monographs play an important role in the research and teaching of faculty members at my institution." Percentage of respondents who strongly agree, over time, compared with the percentage of Faculty Survey respondents who agreed with a similar statement.*
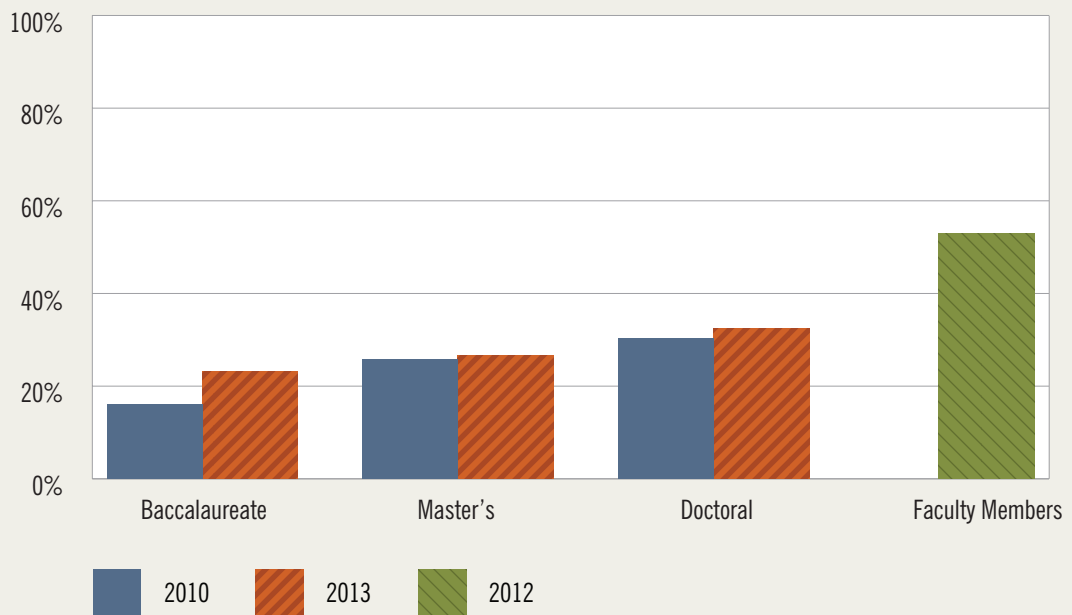
*The version of this question that appeared in the 2012 Faculty Survey read: "Electronic versions of scholarly monographs play a very important role in my research and teaching."

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15   The term "ebooks" was used to broadly refer to any type of digital book collections, but the survey did not provide a definition of the term, so it is possible that there was some variation in how respondents reacted to it. However, note that some questions referred specifically to monographic ebooks using the phrase "electronic versions of scholarly monographs."

16   The scope of the question for library directors is much broader, since it includes all faculty members at their institution, whereas faculty members responded to a question about their own research and teaching.

FIGURE 27

"Within the next five years, the use of e-books will be so prevalent among faculty and students that it will not be necessary to maintain library collections of hard copy books." Percentage of respondents who strongly agreed, over time, compared with the percentage of Faculty Survey respondents who stongly agreed with the same statement.*


*The version of this question that appeared in the 2010 survey used the term "electronic versions of scholarly monographs" in place of "e-books."

As shown in Figure 27, there has been only a slight shift in library directors' acceptance of the idea that ebooks may one day completely supplant physical collections. This statement was intended to be extreme, so it is unsurprising that few respondents strongly agreed. The responses of library directors at doctoral institutions underwent the greatest change between 2010 and 2013. They increased by an amount that was very similar to the change in faculty members' responses between 2009 and 2012.

Ebooks have already had at least some impact on the management of existing print book collections. We asked library directors: "What percentage of your print book collection has your library de-accessioned because you have access to those books in an electronic format?" Of all respondents, 43% reported that they have not deaccessioned any books as a result of having ebook access, while another 45% reported that they had deaccessioned a tenth of their collections or less. (The full results are shown in Figure 28.) Ithaka S+R will continue to track the impact of ebooks on print collections in future surveys.

FIGURE 28
"What percentage of your print book collection has your library de-accessioned because you have access to those books in an electronic format?"

- 0%
- 1 - 10%
- 11 - 20%
- 21 - 30%
- 31 - 40%
- 41 - 50%
- More than 50%
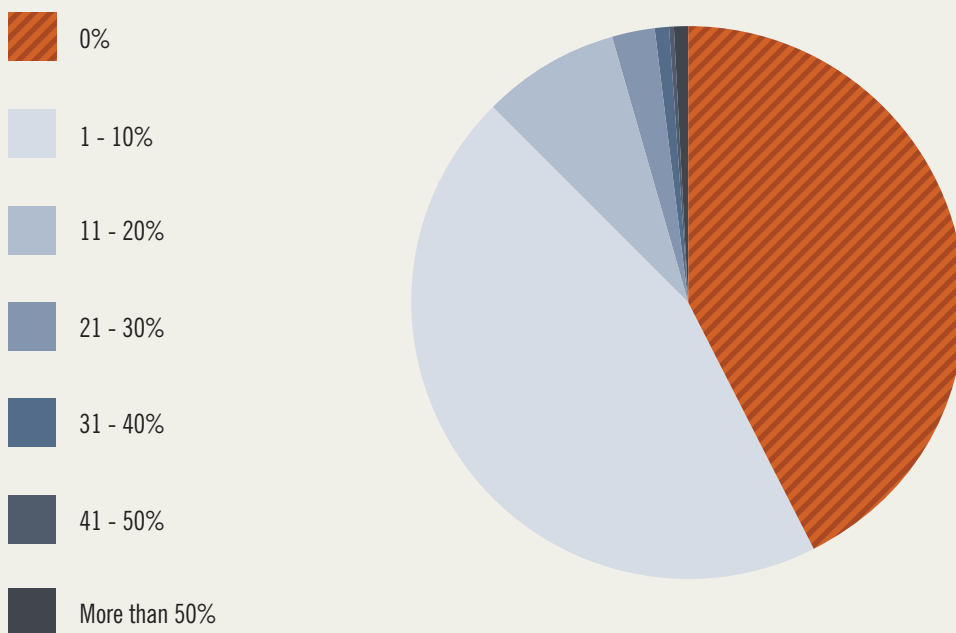
Journals

The 2010 Library Survey and 2009 Faculty Survey together permitted an analysis of the differences between library directors and faculty members over issues related to the management of print journal collections. In general terms, library directors were more comfortable with their libraries' increasing reliance on digital copies of journals than were faculty members. The 2012 Faculty Survey and the 2013 Library Survey indicated that this trend has continued. In the interim, both groups have become slightly more comfortable with relying on born-digital journals.

Library directors continue to be more comfortable than faculty members with the idea of deaccessioning print journals. Figure 29 shows the percentage of library directors who are comfortable with discarding hard copy collections and relying exclusively on digital journals under specific conditions of access and preservation. In the aggregate, there was little change in the percentage of library directors who agreed with this statement. There was a substantial discrepancy between library directors' and faculty members' responses.[17] Figure 30 shows the response to a similar statement: "Within the next five years, the use of online or digitized journals will be so prevalent among faculty and students that it will

17 The faculty member responses shown in this graph are aggregates from all respondents. However, there are some disciplinary differences between faculty members on this issue: higher percentages of respondents in the social sciences and sciences agreed with this statement. Full results for this question from the faculty survey can be seen in Ross Housewright, Roger C. Schonfeld, and Kate Wulfson, *Ithaka S+R U.S. Faculty Survey 2012*, Ithaka S+R, April 8, 2013, http://sr.ithaka.org/research-publications/us-faculty-survey-2012, p. 29.

not be necessary to maintain library collections of hard-copy journals." This statement is different from the previous one because instead of dealing with hypothetical situation, it presents a specific time frame and asks whether print journals be necessary after that time. Majorities of directors at doctoral and master's institutions (and 48% of directors at baccalaureate institutions) believe that print journal collections will be unnecessary in five years.

"Assuming that electronic collections of journals are proven to work well, are readily accessible and are digitally preserved, I would be happy to see hard copy collections discarded and replaced entirely by electronic collections." Percentage of respondents who agreed, over time, compared with the percentage of Faculty Survey respondents who strongly agreed with a similar statement.*
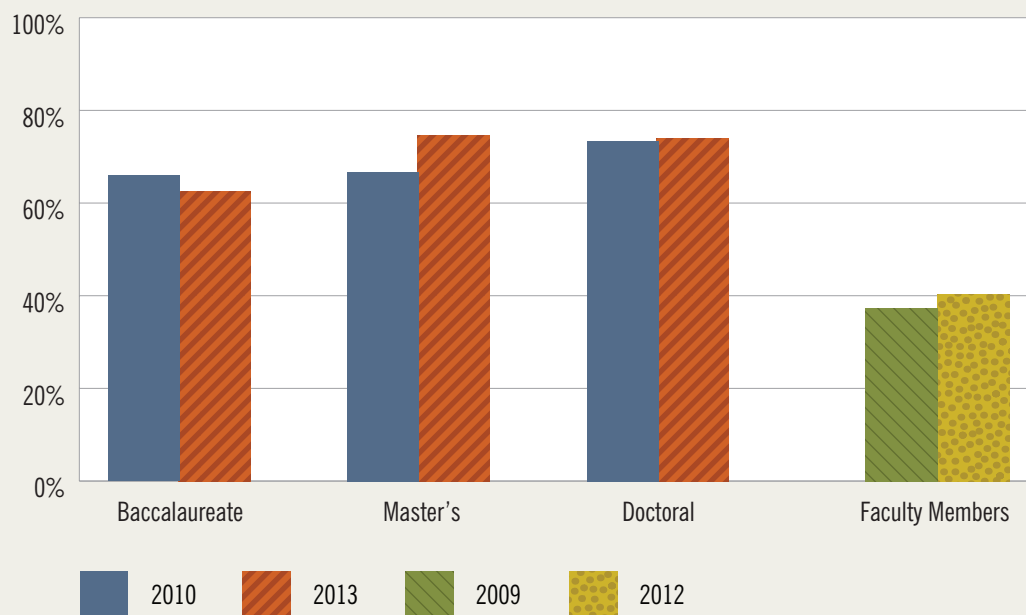
*The version of this statement that appeared on the faculty survey was: "Assuming that electronic collections of journals are proven to work well, I would be happy to see hard copy collections discarded and replaced entirely by electronic collections."

"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." Percentage of respondents who strongly agreed, over time.
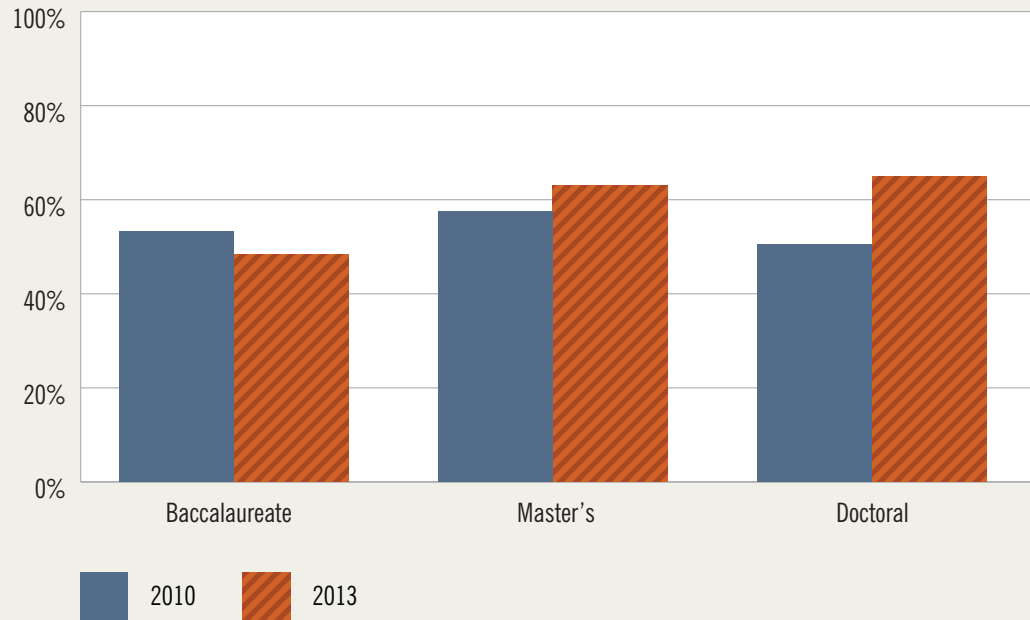
Similarly, Figure 31 shows that library directors are more comfortable than faculty members with the cessation of journals' print versions. Unlike the result from the statement about deaccessioning journals, the data from this question show a clear directionality, with more faculty members and library directors agreeing with the statement in 2012 and 2013 than in previous surveys.

"I am completely comfortable with journals my library subscribes to ceasing their print versions and publishing in electronic-only form." Percentage of respondents who strongly agreed, over time, compared with the percentage of Faculty Survey respondents who strongly agreed with the same statement.
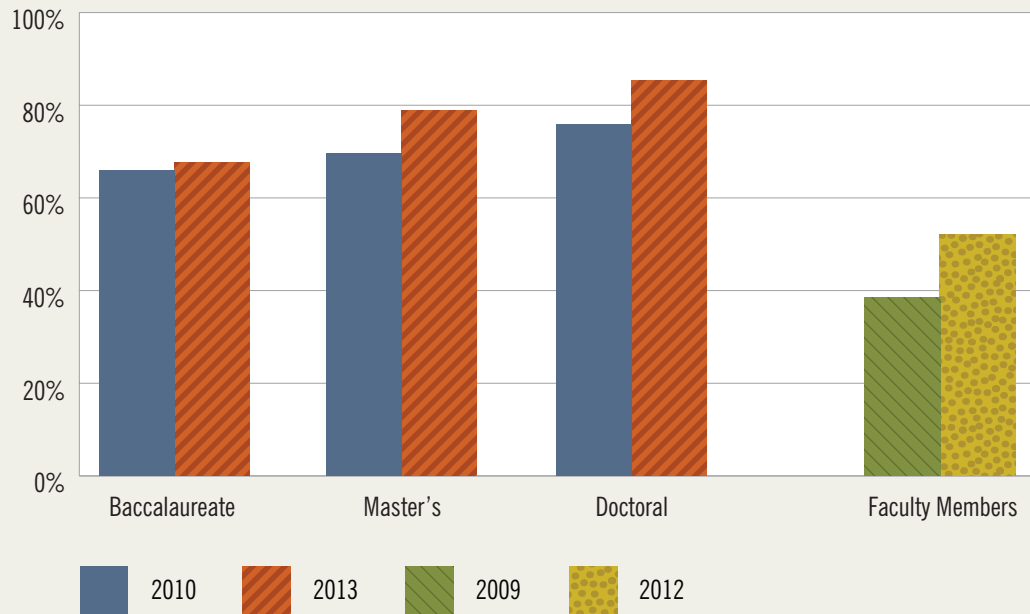
Discovery

The issue of how libraries help their users find relevant scholarly content has been of key concern to many in the library community in recent years. The survey tracked some of the changes in attitudes about discovery. One of the largest shifts in this area was covered above in the section on budgets and staffing, where responses to the "budget increase" question seemed to indicate a declining interest in investing new money in discovery tools. Even while there is less interest in investing more funds in discovery, most library directors continue to agree that it is important to be perceived as the starting point in their users' search for information. At the same time, a smaller number agree that their library is in fact always the best place for researchers to start. Directors' opinions about these issues appear to be changing gradually over time, with some indications of a growing willingness to give up efforts to control users' discovery experiences.

Discovery Strategies

In 2010, Ithaka S+R asked library directors to respond to two statements about their library strategy, and in 2013 we added an additional statement to this set of questions. These statements covered two key themes: the role of the library as a starting place for research, and the importance of being able to guide users to a preferred source (when duplicate online copies exist).

In both of the items that were carried over from the 2010 survey, there were indications that library directors are slightly more comfortable with an environment where they have less control over users' discovery habits. There was a small shift in the number of library directors who agreed that it is important that the library be seen as the first place that users go to discovery content. While the percentage of respondents who agreed with this statement remained very high, it declined from 84% in 2010 to 78% in 2013. (See Figure 32.)

"It is strategically important that my library be seen by its users as the first place they go to discover scholarly content." Percentage of respondents who strongly agreed, over time.
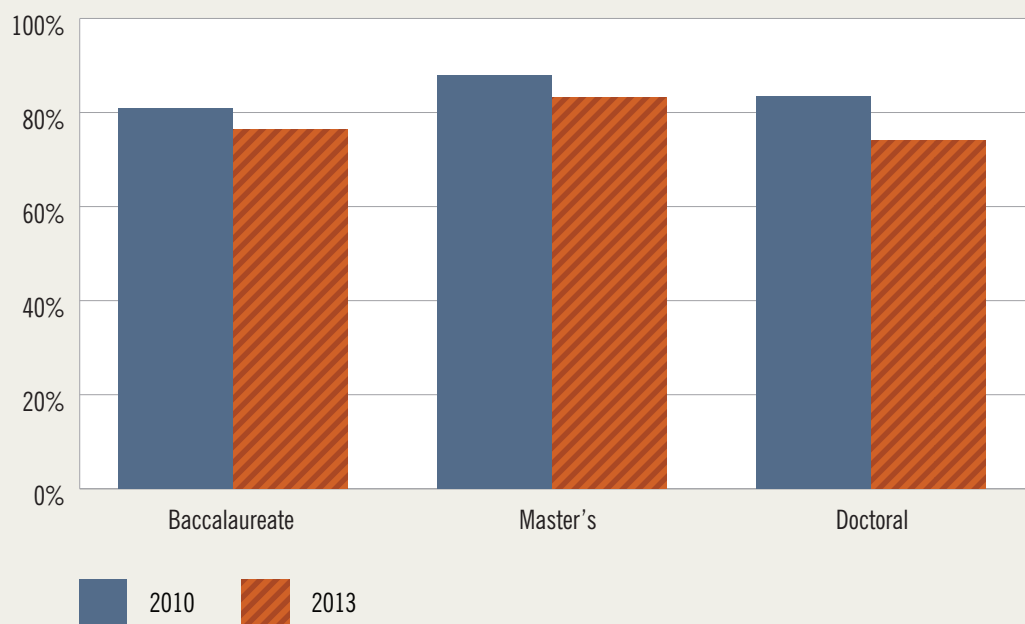
There was a similar decline in the percentage of respondents who said that it is important to be able to guide users toward a preferred online source when there are duplicates available; 50% of all respondents agreed with this statement in 2010 while only 41% did so in 2013. (See Figure 33.) If this pattern were to continue, it could suggest that directors are gradually acknowledging a changing library role for discovery.

FIGURE 33

"When identical online copies of the same item exist, it is important to my library that we be able to guide users to a preferred source." Percentage of respondents who strongly agreed, over time.
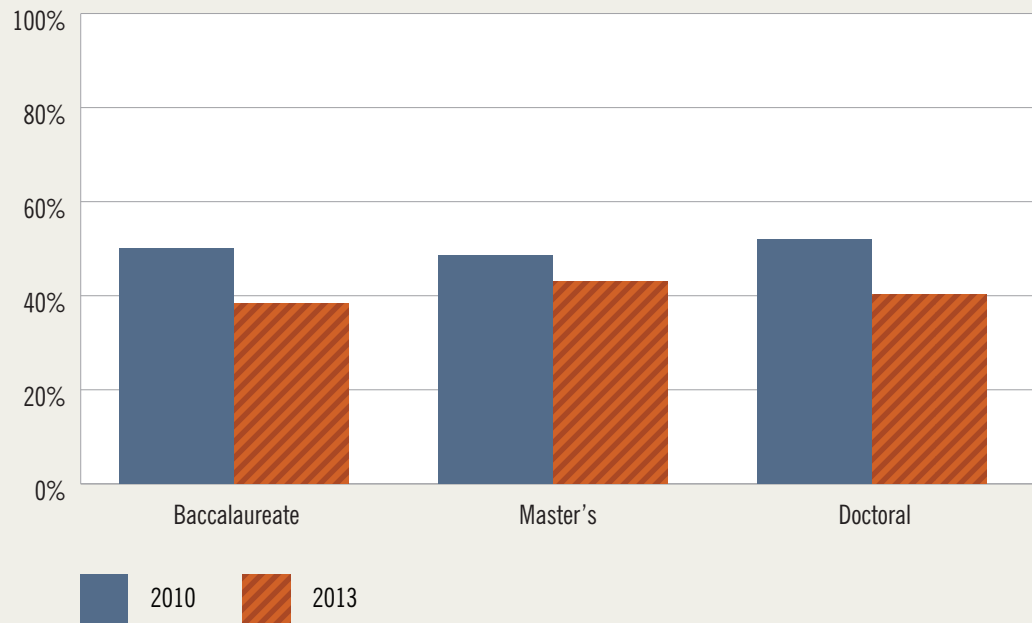
There was a marked contrast between the number of respondents who reported that they aspire for their library to be seen by users as a starting point and the number who indicated that they are currently their users' best option. Only 59% said that their library is always the best place for users to start their research. The complete data are shown in Figure 34.

FIGURE 34

"My library is always the best place for researchers at my institution to start their search for scholarly information."
Percentage of respondents who strongly agreed.
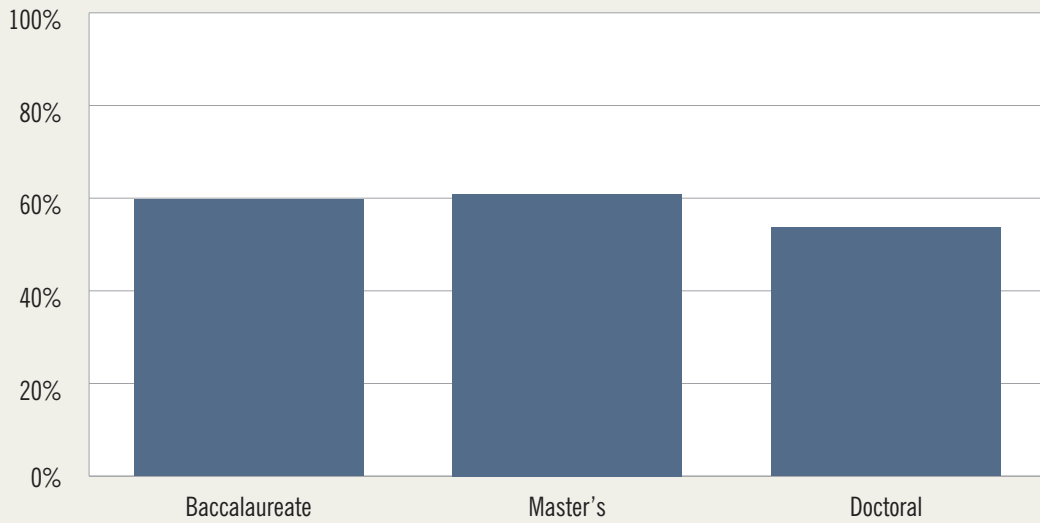
Those library directors who do not see it as important for their library to be a starting point in research may have adopted alternate philosophies about the role that their institutions should play. In response to a general feedback question at the end of the survey one director wrote, "I don't want to presume that all patrons should begin with us... and that if they don't, we've somehow 'failed.' After all, isn't the outcome more important than the path traversed?"[18] However, the data cannot speak broadly to the motivations of these respondents.

Discovery Services

The place of discovery services has evolved rapidly over the three years since this survey was first administered. The results from this question suggest that new types of discovery services are seen as having a generally positive impact, although there is still some amount of ambivalence in regards to certain aspects of their functionality. The results may suggest areas where discovery services need to improve their features and user experience.

Nearly three-quarters of respondents reported that they have implemented an index-based discovery service such as EBSCO Discovery Service, Primo, Summon, or WorldCat Local. These services are more common at larger institutions. Among respondents from doctoral institutions, 86% said that they have implemented a discovery service, compared with 71% of respondents from master's institutions and 67% of respondents from baccalaureate institutions. Among the

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18 This comment came in response to a question at the end of the survey that invited library directors to comment on any issue related to the survey.

respondents that indicate their institution has implemented these services, 81% reported that the discovery service is the default search tool on their libraries' homepages.

We asked libraries that have already implemented a discovery service to rate its effectiveness in improving various aspects of discovery at their library. Specifically, the question read: "To what extent do you think that your index-based discovery service has made your users' discovery experience better or worse in each of the following areas?"[19] The full text of the categories in which respondents rated their services is included in Figure 35. Again, this question was only posed to respondents who reported that they use a discovery service.

"To what extent do you think that your index-based discovery service has made your users' discovery experience better or worse in each of the following areas?" (Includes only respondents at institutions that have implemented discovery services.)
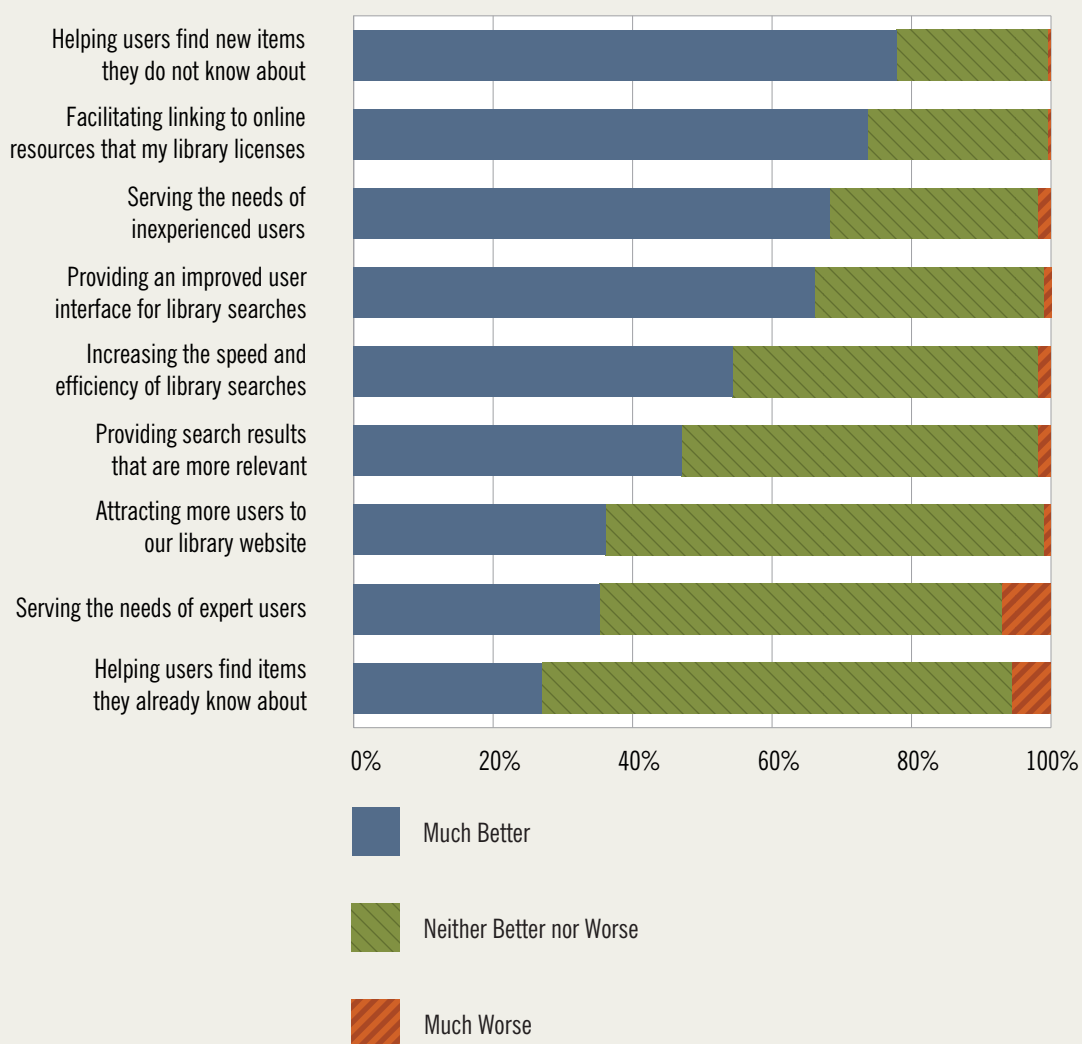
19   A seven-point scale was used in this question.

Discovery services were rated by many respondents as having made positive improvements in the areas of "helping users find new items they do not know about" and "facilitating linking to online resources that my library licenses." These and other responses reflect a perception that discovery services are improving users' pathways to finding content in many key areas. In each category, only a relatively small percentage of respondents believe that these services have had a negative impact.

Discovery services were rated as having the least positive impact in "helping users find items they already know about," "serving the needs of expert users," and "attracting more users to our library website." The low percentage that rated the first two of these items as "much better" may reflect a belief that expert users and patrons who already know what they are looking for are well-served by other discovery tools.

Scholarly Communication and Research Support

Some libraries offer a broad array of specialized services for faculty members, which may include special departments like a digital humanities center, infrastructure such as a digital repository, or programs designed around issues like data management. Only a subset of institutions appears to be pursuing a strategy that emphasizes research services. The results of the survey demonstrated how these services are most common at doctoral universities, where research is more likely to be central to the mission of the institution. However, some types of research services continue to be niche strategies that do not exist at all institutions, even at the doctoral level. Institutional size is not the best predictor of whether or not an institution is offering these services; many research-focused baccalaureate and master's institutions appear to be focusing more on these services than some of their doctoral-level peers.

"How much of a priority is each of the following functions in your library?" Percentage of respondents rating each a high priority, by institution type.
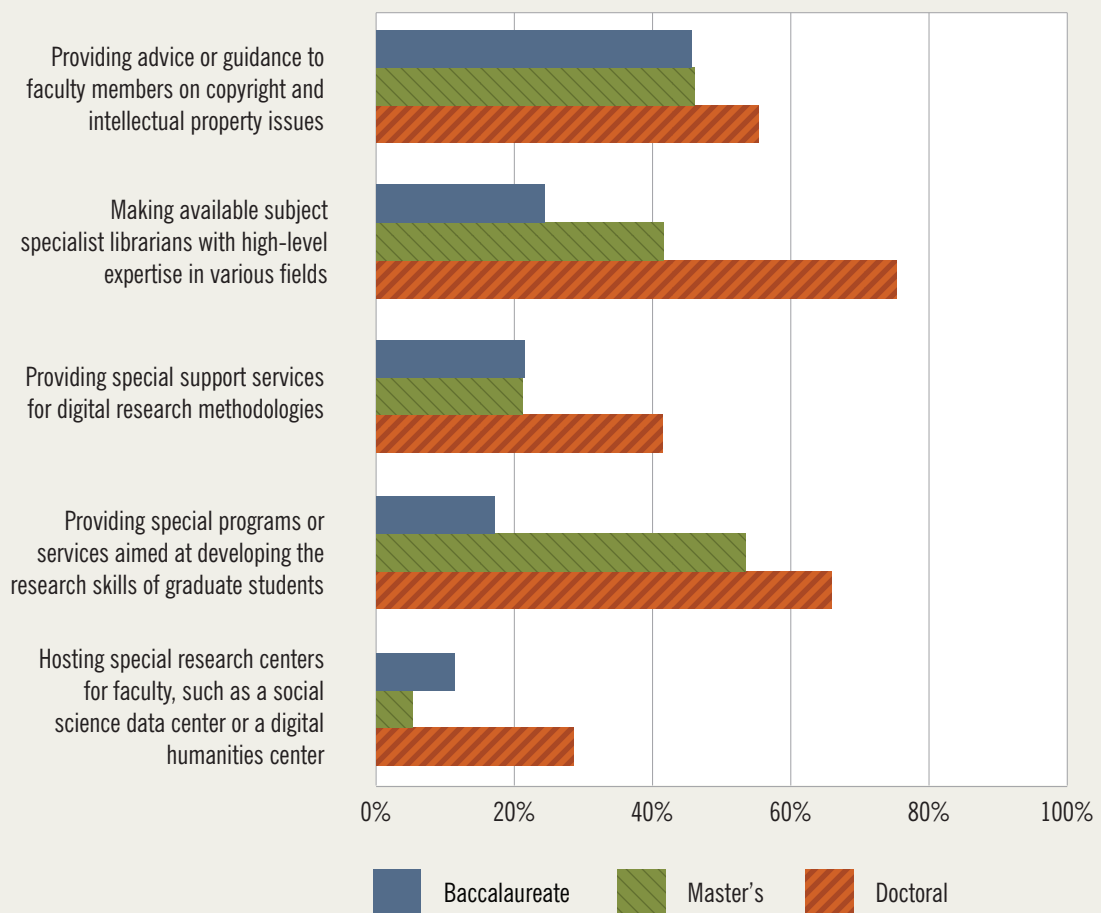
Figure 36 shows library directors' ratings of the priority they assigned to a group of research-related services for faculty members and graduate students. [20] Among these services, providing guidance for faculty members on copyright issues appears to be an important priority for around half of institutions of all types. Supporting digital research methods is a high priority at 42% of doctoral institutions. However, special research centers (such as digital humanities centers or social science centers) hosted by the library remain relatively rare, with only 29% of respondents from doctoral institutions reporting that they host one of these centers. The significant number of respondents from baccalaureate institutions who reported that their library hosts one of these special centers (11%) likely reflects the research focus of a segment of well-resourced liberal arts colleges, which were well-represented in the pool of respondents.

At institutions with graduate programs, special services to help develop the research skills of graduate students are more common than the other services listed here. These programs were identified as a high priority by 66% of respondents from doctoral institutions. [21]

"How much of a priority is each of the following functions in your library?" Percentage of respondents rating each a high priority, by institution type.

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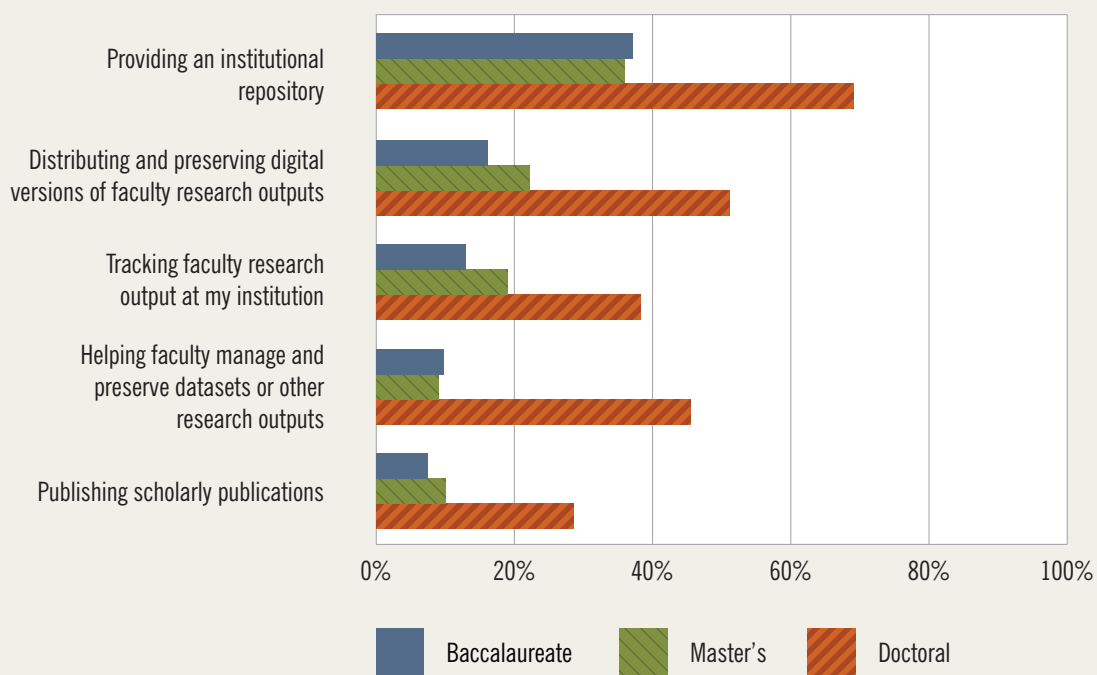
20   These results, along with those in Figure G, are taken from the "library priorities" question. The full results are in Appendix I.

21   Other research that Ithaka S+R has undertaken as part of its Research Support Services program has indicated that there may be demand for more graduate student training programs. See Jennifer Rutner and Roger C. Schonfeld, Supporting the Changing Research Practices of Historians, Ithaka S+R, December 10, 2012.

Figure 37 shows another set of services related to institutional repositories and similar library functions centered on research data and scholarly communications. In these services, there is a much clearer divide between doctoral institutions and other respondents. However, even among respondents from doctoral institutions, fewer than 50% strongly agreed that some of these functions are important.

Among these functions, "providing an institutional repository" garnered the most "high priority" responses. Some of the functions associated with repositories, such as "enabling faculty members to make their research outputs freely available," "distributing and preserving digital versions of faculty research outputs," and "helping faculty manage and preserve datasets or other research outputs" garnered fewer "high priority" responses individually, but they followed a very similar pattern. Tracking faculty research output appears to be of lesser importance among doctoral institutions than some of the other repository-connected functions. Library-based publishing remains a priority for only a minority of libraries, with only 29% of doctoral institutions and even smaller percentages from other groups rating it as a high priority.

In the open-ended question at the end of the survey, which asked for general feedback, there was a wide range of opinions about the types of services listed in Figures 36 and 37. Some library directors wrote that they have already added many services in some of the areas described, and they felt that the survey did not cover these as extensively as it should have. On the other hand, some respondents wrote that their own visions for the futures of their libraries diverge substantially from some of the options queried in the survey. One director wrote: "There are 3,000 academic libraries in the U.S. and most are interested in providing traditional library services in new digital formats rather than adopting mission creep to become publishers, etc." While these responses are only anecdotal, they expose some of the divergent opinions about what constitutes an innovative library service model.

Conclusion

The 2013 cycle of the Library Survey finds some important changes in academic libraries over the past three years. Library directors' attitudes toward print collections are shifting, with respondents placing less emphasis on building library collections. Research support is changing, with many respondents reporting the deployment of innovative new services for faculty members despite some declines in the share who place high value on supporting faculty research. At the same time, more and more directors are embracing a strong role for their libraries in undergraduate teaching and information literacy education.

The findings suggest some areas deserving special attention today and ongoing tracking in years to come. For example, the widespread market penetration of indexed discovery services, in combination with limited but notable shifts in respondents' attitudes about discovery strategy, suggests that this is an especially fertile area for continuing change. There may be intriguing changes concerning format transition issues for books, especially given the real divergence in views between library directors and faculty members. Finally, respondents' efforts to increase staff, in combination with concerns about levels of staffing and staff skills, indicate that academic libraries will continue to face human resources challenges in the coming years. In the next survey cycle, anticipated for 2016, we hope to follow up on many of these points and others as higher education institutions and their libraries grapple with strategic change.

Appendix I. Library Functions Question

"How much of a priority is each of the following functions in your library?" Percentage rating each item as a high priority.

Reference instruction
Physical space for student
Inter-library loan
Licensing electronic journals
Index-based discovery service
Copyright advice and guidance
Special collections
Digitizing library materials
Institutional repository
Preserving digital materials
Teaching centers
Services for online students
Print book collections
Subject specialist librarians
Supporting digital methods
Instructional design services
Making research openly available
Learning Management System
Graduate student programs
Preserving faculty research
Tracking research output
Hosting research centers
Managing faculty datasets
Library-based publishing

0%   20%   40%   60%   80%   100%

Baccalaureate   Master's   Doctoral