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The State of
ACADEMIC LIBRARIES
BENCHMARK SURVEY

• 2019 •

Introduction

The 2019 State of Academic Libraries Benchmark Survey, is a comprehensive survey of 244 academic libraries, administered by Library Journal and commissioned by Ex Libris.

This study was commissioned to:

- Identify the key missions of academic libraries
- Examine the perceived challenges of academic libraries
- Evaluate the extent to which the library is connected to the broader institution
- Determine the issues that libraries will face in the future

Findings at a Glance

Budget trends have stabilized – with 26% reporting expected increases

Between **1982 – 2011** universities halved the library's share of budget (Davis, 2014)

In sharp contrast,

37% now expect budgets to remain stable,

26% expect their budget to grow,

28% expect it to shrink.

60% say they could justify increased budgets if they expanded their remit

Academic libraries are reinventing themselves

35% are leading their affordable learning initiatives, more than the Provost's Office

78% support course materials

56% want to increase their support for research

The Library's Mission

The survey asked respondents about how important various concepts were to their academic library mission.

Figure 1 : *Ranked listing of concepts that are important or very important to the academic library mission statement.*

Impact of various concepts to mission statements ranked by importance

Concept	Important	Very Important
Teach students research and information skills	15.5%	80.6%
Support institutional mission	23.2%	70.9%
Student engagement	30.8%	60.1%
Provide course materials & support faculty	33.1%	54.3%
Provide individual and collaborative workspaces	28.7%	57.1%
Support research	30.4%	52.2%
Collection development & preservation	36.9%	45.6%
Student retention	21.3%	51.8%
Affordable learning	28.6%	42.5%
Support role of the institution in local/global cmnty's	35.3%	29.4%

■ Important   ■ Very Important

The three most important topics to the library's mission were Teach Students Research and Information Skills (96%), Supporting the Institutional Mission (94%), and Student Engagement (91%). But significant importance was also given to concepts not traditionally centered in the library. These include Provide Course Materials & Support Faculty (87%), Support Research (83%), and Affordable Learning (71%).

As stated by Jurgen Schulte, et al., in College and Research Libraries' *Shaping the Future of Academic Libraries: Authentic Learning for the Next Generation,* "by shifting the role of the academic librarian away from the physical library and engaging with staff and students... [the modern academic library] has become a much more valuable and effective contributor to improving the student experience, playing a key role in curriculum."

Some traditional library responsibilities such as Teaching Students Research and Information Skills continue to rank highly. Others, like Collection Development and Preservation (83%), rank lower than Provide Course Materials & Support Faculty (87%), reflecting a new focus on facilitating scholarship at the expense of knowledge curation.

Figure 2 : *Table shows the percentage of respondents who considered the topic was Important or Very Important to their mission statement*

Academic Library Mission Statements Rated by Institution Type						
	ARL Institutions	Doctorate-Granting Institutions	Master's Institutions	Baccalaureate Institutions	Associates Institutions	Survey Average
Student Engagement	100.0%	93.3%	90.3%	81.5%	93.3%	91.7%
Student Retention	57.0%	72.5%	73.6%	66.7%	85.0%	71.0%
Affordable Learning	50.0%	67.0%	72.2%	55.6%	88.3%	66.6%
Provide Course Materials and Support Faculty	78.5%	85.7%	83.3%	87.0%	90.0%	84.9%
Support the Role of the Institution in Local/Global Community	71.4%	71.4%	59.7%	57.4%	66.7%	65.3%
Support Research	100.0%	93.4%	87.5%	79.6%	70.0%	86.1%
Support Institutional Mission	92.8%	93.4%	94.4%	92.6%	95.0%	93.6%
Teach Students Research and Information Skills	100.0%	97.8%	94.4%	96.3%	100.0%	97.7%
Provide Individual and Collaborative Workspaces	85.7%	85.7%	84.7%	87.0%	91.7%	87.0%
Collection Development and Preservation	85.7%	85.7%	87.5%	77.8%	78.3%	83.0%

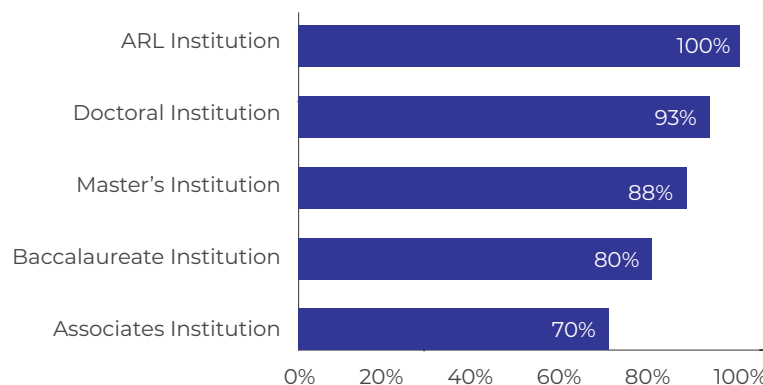## Different Missions for Different Libraries

100% of the Academic Research Libraries (ARLs) and Special Function institutions reported that Research Support is a key objective.

The survey also revealed that Associates colleges' libraries ranked Support Research as a topic that was important to their mission (70%), not far behind Baccalaureate institutions (80%).

As the Council on Undergraduate Research report *Undergraduate Research at Community Colleges* explained, research is not only "a value-added component of the educational program" but applied research is also practiced, in order to "expand the knowledge of" the scientific method.

Figure 3 : *Graph shows ARL members valuing research support more highly than all other institution types, although it is still important at most Associates Degree Colleges.*

Importance of Research Support by Institution Type

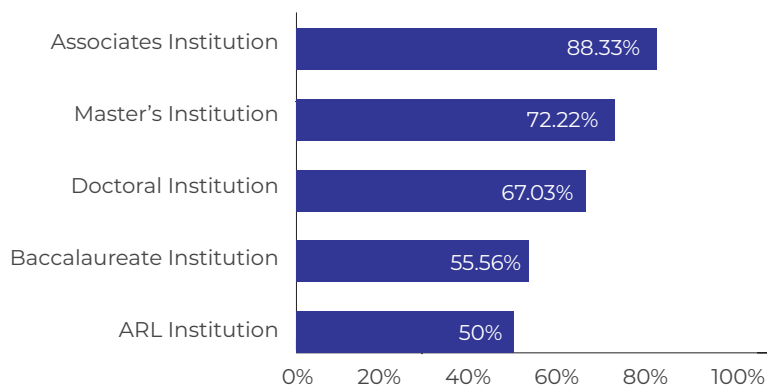| Institution	Value
ARL Institution	100%
Doctoral Institution	93%
Master's Institution	88%
Baccalaureate Institution	80%
Associates Institution	70%

Associates Institutions rank highest for Learning Affordability (88%). In the Inside Higher Ed article *Community Colleges and the Future of Higher Education*, Steven Mintz described community and associates colleges as "an affordable, accessible, learning- and skills-centered option, especially for non-traditional students." They are further considered an important link in federal government college affordability programs, offering grants to help students cut the costs of associate degrees and pave their way to higher education.

88%
Associates Institutions Focus on Learning Affordability

Figure 4 : *Associates Colleges lead the field with their focus on the cost of learning.*

Importance of Learning Affordability by Institution Type

Institution Type	Percentage
Associates Institution	88.33%
Master's Institution	72.22%
Doctoral Institution	67.03%
Baccalaureate Institution	55.56%
ARL Institution	50%

Budget, Funding and Challenges to the Library

Concerns over Funding and Staffing

With 62% of libraries predicting budgets to grow or remain static, they are saying the constant 30-year funding decline is finally stabilizing, with 25% reporting a degree of optimism.

In Scholarly Kitchen's "Libraries Receive Shrinking Share of University Expenditures," Phil Davis showed that the academic library's share of overall budget has been steadily shrinking. In 2011, academic libraries accounted for just 1.8% of the total university budget, decreasing from a record high of 3.7% during the 1980s. Leonard Kniffel and Charles Bailey Jr. confirmed in *Cuts, Freezes Widespread in Academic Libraries*, that academic library budgets have been in decline.

In sharp contrast to that historical decline, this new survey data shows budgets have stabilized.

↑**25%**
expect budgets to increase over the next 5 years

↔**37%**
expect it to remain static

↓**28%**
said it would shrink

Despite the budget forecast stability, the top three primary challenges were still Acquisitions Budget Limitation, Lack of Staff and Funding Cuts. Just because budgets have levelled out, or in some cases are increasing, does not necessarily imply budget-sufficiency for library initiatives.

Figure 5 : *The most challenging topics are not always aligned with their impact on the library's mission.*

Key Challenges of Academic Libraries and Impact on their Mission		
	Challenge for Library	Impact on Library's Mission Somewhat or Very Impactful
Acquisitions budget limitation	71.0%	83.0%
Lack of staff	66.3%	87.3%
Lack of physical space	43.3%	70.4%
Other departments want to use library space for specific purposes	36.9%	63.0%
Poor communication with faculty	32.5%	78.5%
Poor communication with administration	30.6%	85.5%
Inadequate IT systems	29.8%	83.8%
Challenges with discovering multiple resource formats	24.2%	62.3%
Issues with collaborating with other libraries	15.1%	42.1%
None of the above	2.8%	

Respondents rated the impact of their concerns on their ability to achieve their core library goals. The same top three were considered high but a very high 93.5% said that Funding Cuts had either Some or High Impact on their library's ability to perform its mission. The respondents agree that pervasive funding limitations are both challenging and impactful.

In 2009, during the long and steady decline in university spending on the academic library, Leonard Kniffel and Charles Bailey Jr. commented on the negative impact funding cuts have on an academic library in *Cuts, Freezes Widespread in Academic Libraries* for American Libraries Magazine, noting that "shrinking budgets impact everything—from staff, to collections, equipment, and facilities." Kniffel adds that cuts and freezes result in an "inability to pursue desired projects/ materials due to lack of funds," and creates more work "as vacancies are not filled."

This survey supports the conclusion, that lack of funding is still a major problem in librarianship, but importantly this survey predicts a more stable budget outlook for 2019-2024, with some optimism, as opposed to the consistently negative budget trend for 2009-2014. This is entirely consistent with our conclusion that budgets have stabilized after years of decline.
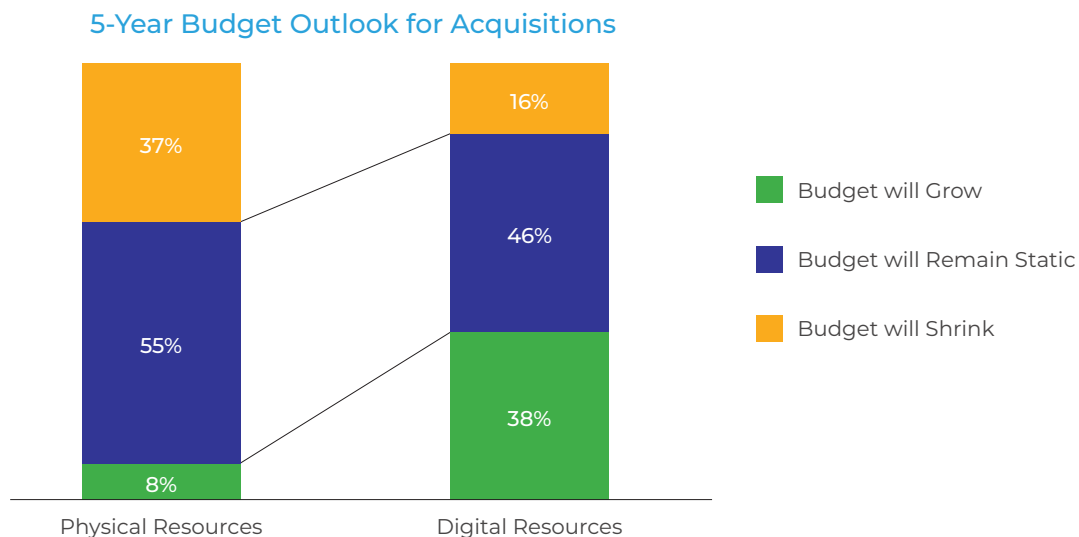
Figure 6 : *With a fairly neutral outlook prediction, approximately equal portions of respondents said their five-year budgets would shrink as would grow, and about one third said the budget would remain the same.*

The Academic Library's Budget Expectation from 2019 – 2024

8.9% Don't know

28.3% Shrink

25.7% Grow

37.2% Remain the same
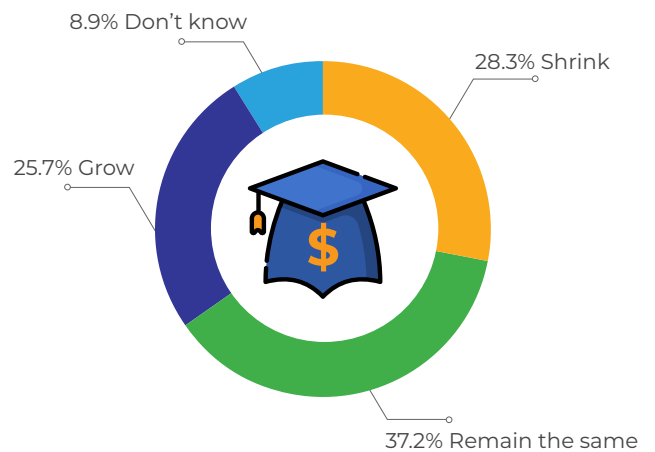
Budgets are Shifting from Physical to Digital Materials

Figure 7 : *Acquisition budgets for Digital Resources are expected to rise at the expense of Physical Resources.*

5-Year Budget Outlook for Acquisitions

Physical Resources: 37%, 55%, 8%
Digital Resources: 16%, 46%, 38%

- Budget will Grow
- Budget will Remain Static
- Budget will Shrink

The survey reveals a growth in digital resource budget, at the expense of physical resources, as supported by Joseph Esposito of Ithaka S+R in his Library Acquisition Patterns report. In it he explains how during 2014-2017, the absolute spend on physical far exceeded digital, but that e-book expenditure increased by 9% while print book expenditures dropped by 12%.

Academic libraries continue to evolve their collection development models, transitioning away from ownership of physical resources, where the focus is to anticipate patron usage, and moving towards leasing on-demand digital materials.

Inter-Library Collaboration is Not an Issue

The survey shows that collaboration is not a significant challenge for the modern academic library. Only 15% reported issues collaborating with other libraries, and, of those, only 42% said it was impacting the library's mission.

These low numbers reflect major steps taken over time by libraries to organize themselves into groups. In a recent report from Ithaka S+R, entitled Restructuring Library Collaboration, Roger Schonfeld explained the roots of collaborative networks. "From the beginning of the 20th Century, library leaders began establishing interlibrary lending networks." These networks operated under constraints of a pre-digital age, due mainly to the "logistics

associated with sharing print collections, and travel and transportation generally."

In Collaboration by academic libraries: What are the benefits, what are the constraints, and what do you need to do to be successful? Jerry Atkinson explains "effective collaboration is no longer an option but a necessity." Schonfeld further explained that "as technology-based products have become the heart of [library systems, they] increasingly serve as infrastructure for collaboration" which makes it easier for once-cumbersome, print-focused lending networks to provide quicker and more reliable delivery of materials.

Collaboration Outside the Library

Librarians and Teaching Faculty Have a Communication Disconnect

67% said they need to collaborate more with faculty. However, when this perspective is eventually translated into actionable initiatives, they may receive some push-back.

Library Journal's Bridging the Librarian – Faculty Gap in the Academic Library showed that 98% of academic librarians thought there needed to be better communication with faculty, conversely only 45% of faculty agreed that better communication was necessary.

This study used the term 'Collaboration' while the other used 'Communication'. While they are not synonyms, as libraries seek to increase their scope of influence and support, it is possible that there will be some faculty resistance.

The Library-Research Relationship is Growing

Academic libraries' desire to do more extends into the context of research. 56% agreed when asked whether the library could play a stronger role in the research process for tasks commonly performed by research faculty, such as managing research output & data, improving research discoverability and managing faculty profiles. Half that number, 28%, disagreed.

For ARL members, the contrast was greater. The proportion that agreed jumped from 56% to 78%, and only 14% disagreed.

Figure 8 : *Libraries want to support research faculty by assuming tasks usually performed by researchers.*

Librarians' Aspiration to Play a Stronger Role Supporting Research
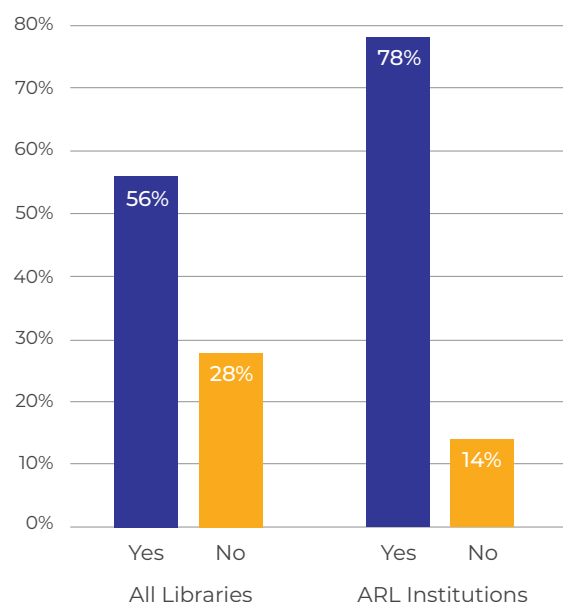
Affordable Learning Initiatives

Libraries are Leading Institutional Learning Affordability Initiatives

At 35% of the institutions surveyed the library is leading affordable learning initiatives, with the Provost's Office coming in second (34%).

The fact that the library is close to, let alone leading the Provost's Office, is remarkable considering that it is the branch dedicated to implementing academic priorities and allocating resources to them.
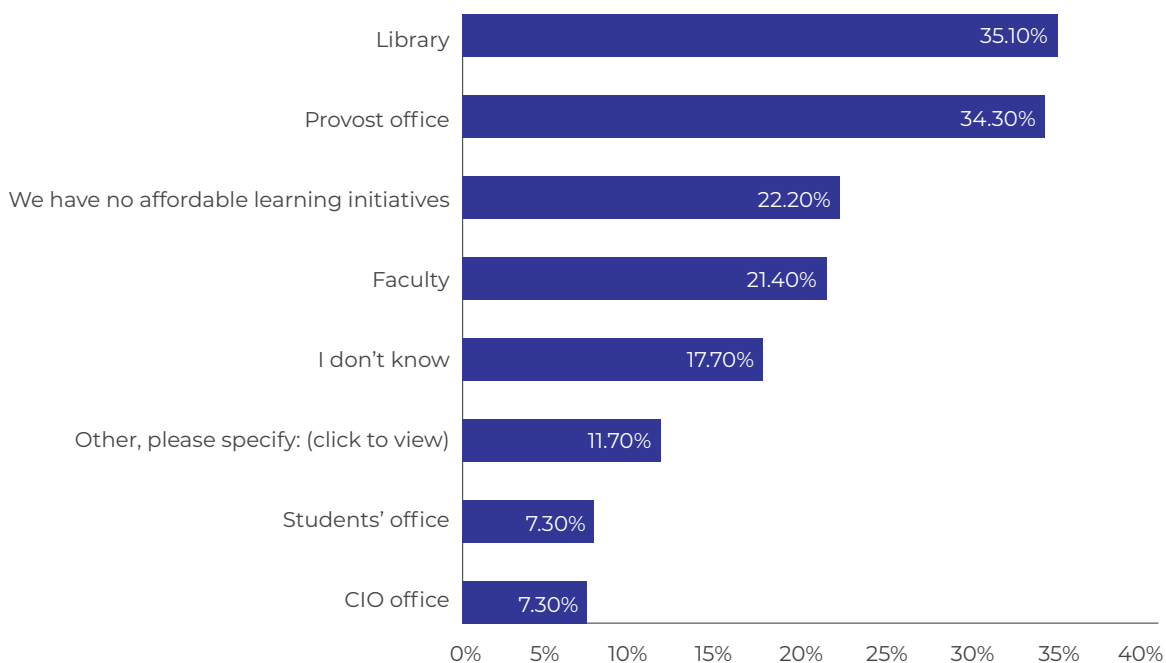
Morgan Kubelka explains why libraries sit in an ideal position within the university to lead affordable learning. In *How Librarians are Impacting Student Affordability*, she describes how a confluence of "marketing the library's resources, beefing up their patron services and continually seeking innovative ways to contribute to student success" has made the academic library the rising star of the affordable learning

sphere. Considering a further 22% of institutions reported having no affordable learning initiatives as of yet, there are still opportunities for libraries to fill the gap and further establish their leadership role in student affordability.

Figure 9: *Libraries are the leaders of Affordable Learning Initiatives across all universities, with the Provost's Office close behind.*

Departments Leading Their Institution's Affordable Learning Initiatives

Department	Percentage
Library	35.10%
Provost office	34.30%
We have no affordable learning initiatives	22.20%
Faculty	21.40%
I don't know	17.70%
Other, please specify: (click to view)	11.70%
Students' office	7.30%
CIO office	7.30%

Leading by Example in Learning Affordability

71% of librarians agreed that affordable learning is a key principal of their library's mission, and they are leading by example. When asked about their current involvement in learning affordability programs, 80% of all academic libraries say they play some role in reducing the cost of access to educational material.

This, Kubelka points out, is because libraries have a growing interest in making a "measurable impact on student success" in order to demonstrate the value of the library. By edging out the bookstore as the sole provider of non-research academic materials, libraries are better able to show their value to the process of learning and to the institution.

Libraries Can Save Students Money by Reducing Course Pack Usage

The survey reveals that course packs have achieved moderate usage (44% say their students use them). But where they are popular, students usually bear the financial burden (of that 44%, 64% are paid for by students). Sometimes the cost is shared between the institution and students (19%) and rarely does the institution absorb the entire cost (8%).

Course packs are defined by Stanford University Libraries as a collection of materials, often book chapters or journal articles, "used in the classroom, distributed either in digital file format

('e-Reserves') or photocopied in book format or as class handouts." They are an intermediate option for savings, making students only pay for specific chapters and articles instead of whole texts or journals.

Some libraries have begun to offer faculty the option to create course packs because they know what materials are available, and at what cost. With the advent of new, connected technologies, libraries stand to reduce course costs by aligning their purchasing with course reading lists.

Library Leadership to Reduce Course Pack Usage is Still in the Early Stages

One in three libraries (36%) do not know whether their students use course packs. This lack of awareness presents a latent opportunity for those libraries to join those that have already focused on reducing dependence on course packs, such as the program developed by University of St. Thomas.

Greg Argo, Associate Director for Access and Digital Services at St Thomas, found that students were over-paying for existing course packs. In one course pack instance he explains "75% of the readings could be supplied via library subscriptions, 15% were freely available online, and 10% could have been digitized from print materials and provided via Fair Use. The cost of that packet could have been reduced to zero." During the first year, the library was able to manage 94 course reading lists, "resulting in a cost savings of $80,000."

In addition to those who said the library and the Provost's Office were taking the lead, 21% said faculty was leading affordable learning initiatives. If any of those faculty had worked in isolation and not engaged the library, then that would partially explain the 36% of librarians that don't know whether the students use course packs – they simply wouldn't have known it was happening and could be addressed with better collaboration and communication.

Faculty members can bypass the library and go direct to copyright clearance services, which compile the materials for a fee and charge based off the copies sold. Stanford University Libraries cites that independent copyright clearance companies often charge 8 – 10 cents per page.

Some faculty make their own course packs, often because clearance companies are unwilling or unable to get permission for certain works. But this pragmatism raises legal concerns for the institution as outlined in What Faculty Need to Know About Copyright for Teaching.

Due to the cost of print materials and the growing use of on-demand e-Reserves, libraries are better equipped in the digital age to help cut costs for students and replace course packs with institution-purchased digital options. To be effective, the library and faculty will need to collaborate in the development of cost-effective and copyright-compliant reading lists that leverage the libraries existing assets.

Figure 10 : *Course packs are moderately popular but more than one in three libraries are yet to engage in their use.*

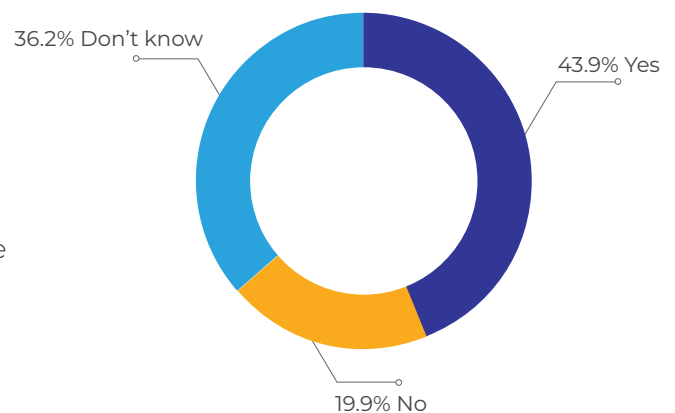### Academic Librarians Report Whether Their Students Use Course Packs

36.2% Don't know

43.9% Yes

19.9% No

Figure 11 : *Course packs can help with affordable learning, but 82% said students are expected to pay for all or part of them.*

Academic Librarians Report Who Pays for Course Packs

10.3% Don't know

18.7% A mix

63.6% Students
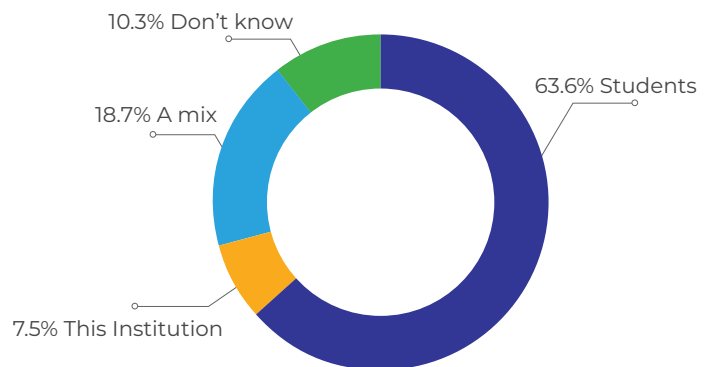
7.5% This Institution

Figure 12 : *Course packs are most prevalent at high-budget institutions as well as the other end of the academic scale at institutions which explicitly focus on learning affordability such as Associates Colleges.*
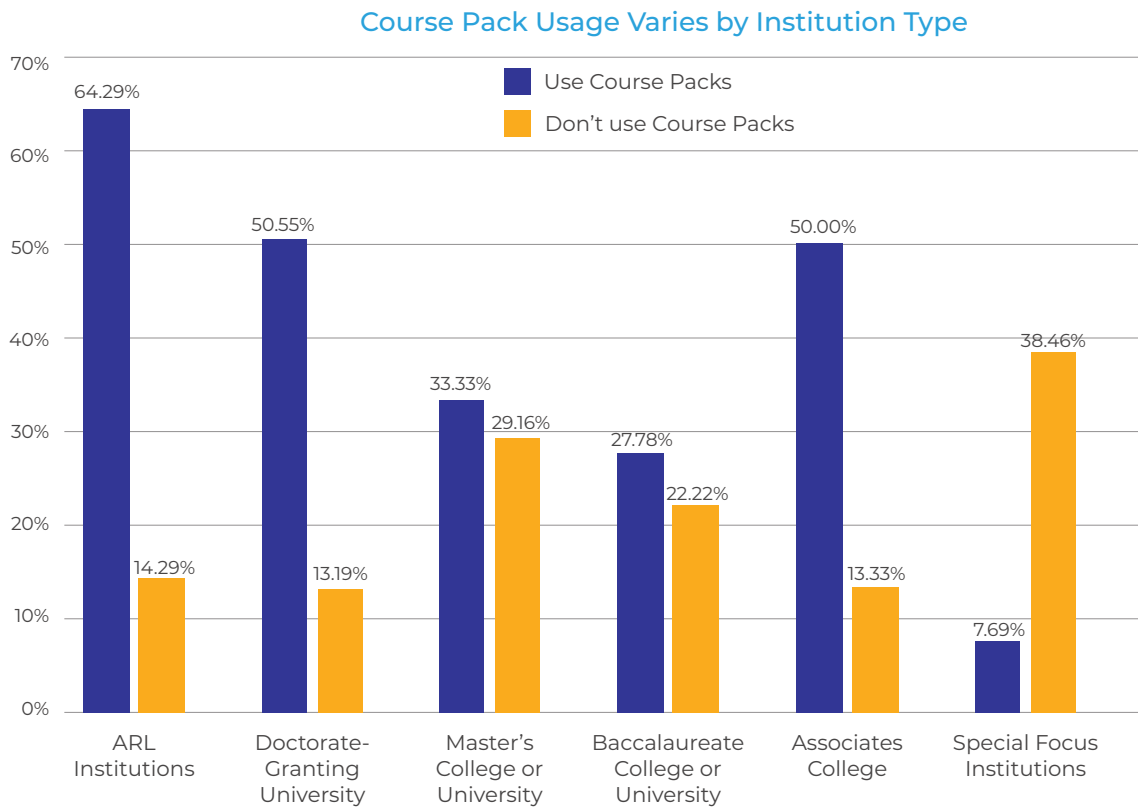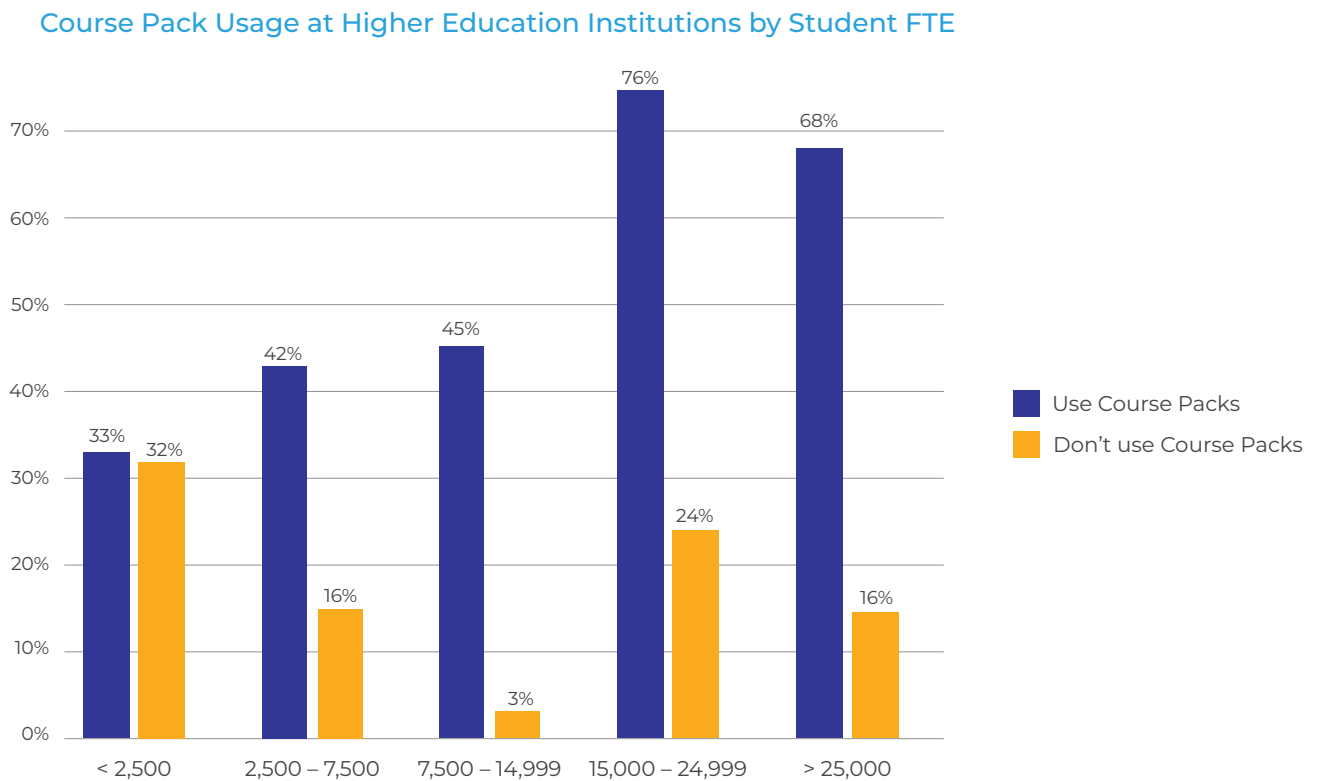
Course Pack Usage Varies by Institution Type

Legend:
- Use Course Packs (dark blue)
- Don't use Course Packs (orange)

Institution Type	Use Course Packs	Don't use Course Packs
ARL Institutions	64.29%	14.29%
Doctorate-Granting University	50.55%	13.19%
Master's College or University	33.33%	29.16%
Baccalaureate College or University	27.78%	22.22%
Associates College	50.00%	13.33%
Special Focus Institutions	7.69%	38.46%

Figure 13 : *Course packs are popular everywhere except the smallest institutions.*

Course Pack Usage at Higher Education Institutions by Student FTE

Legend:
- Use Course Packs (dark blue)
- Don't use Course Packs (orange)

| Student FTE	Use Course Packs	Don't use Course Packs
< 2,500	33%	32%
2,500 – 7,500	42%	16%
7,500 – 14,999	45%	3%
15,000 – 24,999	76%	24%
> 25,000	68%	16%

Supporting Course Materials

All Libraries Support Course Materials

Almost every institution reported that they are "very or somewhat involved" in providing scholarly resources (98%), indicating that a core library responsibility is providing scholarly resources for access by faculty and students, regardless of institution type or size.

Figure 14 : *The near-unanimous involvement in providing access to scholarly resources shows how much libraries value supporting faculty.*

Academic Libraries are Focused on Providing Access to Scholarly Sources

- 10%
- 2%
- 88%

- Very Involved
- Somewhat Involved
- Not Too Involved
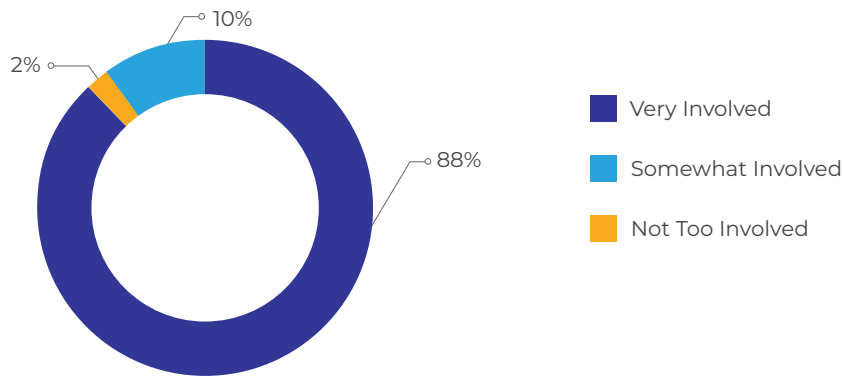
What Constitutes Supporting Scholarly Sources?

The survey revealed a discrepancy between the library's desire to support scholarly sources, the actual provisioning of those resources, and assistance with administrative workflows.

87% of respondents said Providing Course Materials & Faculty Support is important to the library's mission. Moving from intention to action, slightly fewer, 78%, reported that their library actually supports course materials, of which only half support reading list creation and management for faculty (51% of the 78%).

Figure 15 : *Supporting faculty course materials is a core mission for the vast majority of academic libraries.*
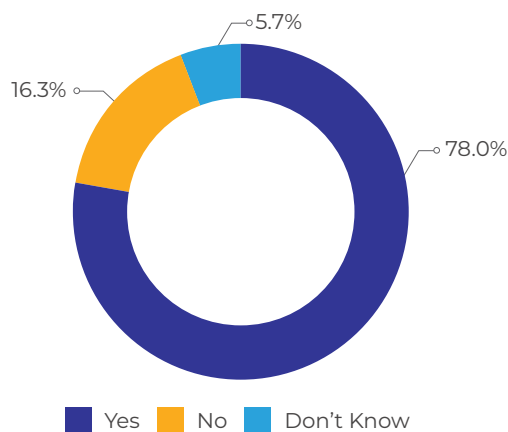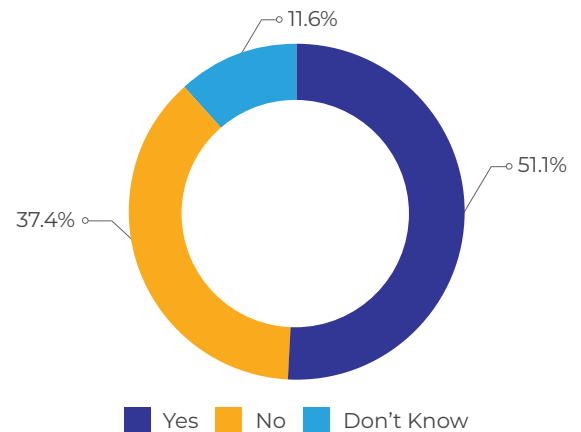
Figure 16 : *Of those libraries that already support course materials, the majority go further and support the creation and management of course reading lists.*
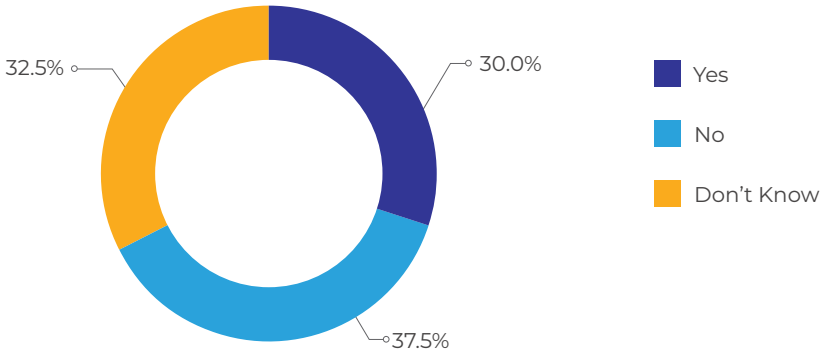
Are Academic Libraries Supporting Course Materials?

- 5.7%
- 16.3%
- 78.0%

- Yes
- No
- Don't Know

Are Academic Libraries Supporting Course Reading List Creation?

- 11.6%
- 51.1%
- 37.4%

- Yes
- No
- Don't Know

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As library management solutions become more integrated and awareness increases, the number of institutions that manage course reading list solutions will rise as Ken Chad explains in his Higher Education Library Technology Briefing Paper, _The Rise of Library Centric Reading List Systems_. "Around 70 per cent of the [United Kingdom] libraries in higher education have installed such solutions" and "library resource list solutions are beginning to be adopted in the US".

Figure 17 : _For those libraries that do not currently support course materials, the opinion is split evenly between those who think they should start, those that decline and those who don't know._

Should the Library Should Start Supporting Access to Course Materials?

32.5%   30.0%

37.5%

- Yes
- No
- Don't Know

However, within libraries which do not yet support course materials, opinions are evenly split over whether the library should get involved at all. Of those who have not begun supporting course materials, 30% reported they should, 38% said they should not, with the remaining 33% reporting they did not know. Kubelka explains this as a "philosophical debate among librarians... whether or not it's the library's job to procure classroom texts, which do not necessarily fall into the category" of supporting scholarly resources or research.

Supporting Research

Libraries Already Support Research, and Have Ambitions to Do More

The vast majority said that supporting research was important to the library's mission (83%). However, how that translates into action varies. Almost everyone provides access to scholarly resources (98%), about half deposit publications or datasets into research repositories (45%), and fewer monitor the impact of research (32%). This shows that different libraries have different definitions of what supporting research might be, but that there is room for growth.

Library support for the research enterprise can come in many forms. In the Journal of eScience Librarianship's *The Role of the Library in the Research Enterprise*, Christopher Shaffer provides many examples, including research data and metadata management services, "assessing research impact through bibliometrics and citation analysis," and promoting scholarly outputs of the institution.

ARL Institutions Foster Research Administration

Librarians at ARLs are particularly heavily involved in the research process. 93% said they assist staff in depositing datasets into the institutional repository and 79% are involved in monitoring the impact of research conducted.
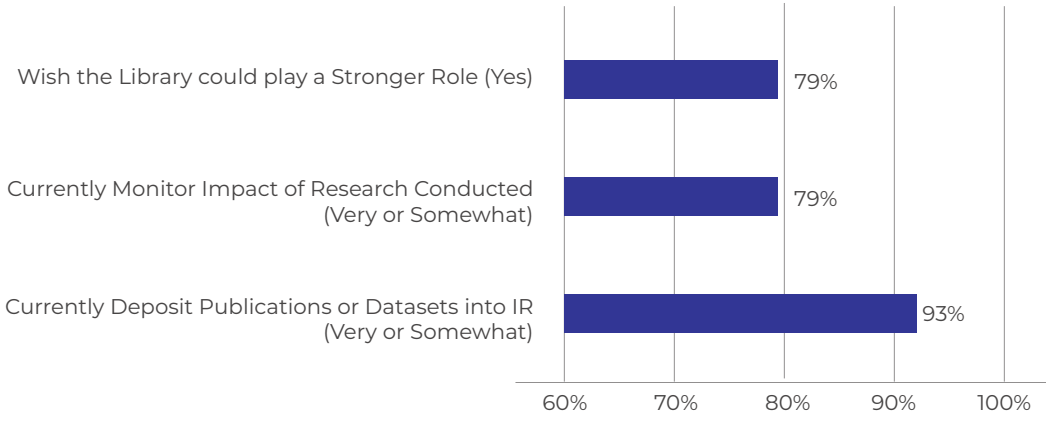
Despite this current high level of engagement, looking forward, 79% wished they could play a stronger role in the research process, showing that not only do these librarians value their current contribution, but also their role within the research process.

This reflects the Association of Research Libraries' Vision Statement, which predicts that by 2033

libraries will have transitioned from being a "knowledge service provider within a single university to become a collaborative partner within a broader ecosystem of higher education." It goes on to say that research libraries will support the "full life cycle and activity range of knowledge discovery, use, and preservation, as well as the curating and sharing of knowledge."

The data shows that ARLs are not only meeting these goals but exceeding them as early as 13 years prior to the 2033 vision statement target.

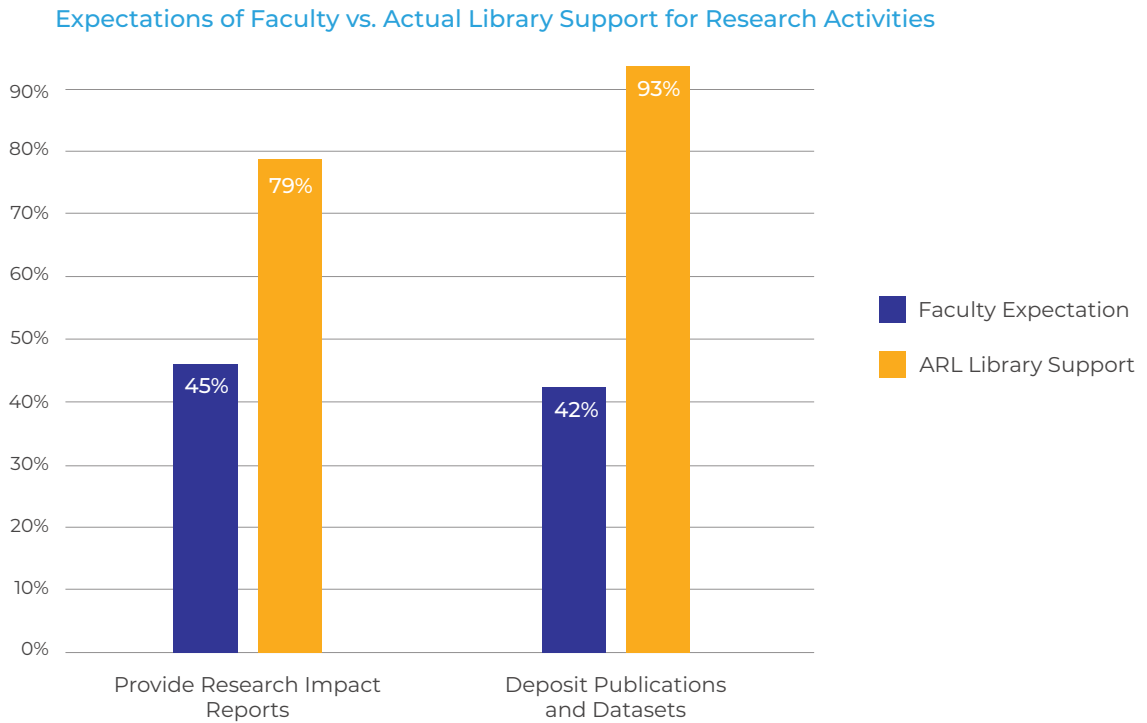**Figure 18 :** *ARLs are already heavily involved in the process of research management but still want to do more.*

Involvement of ARLs in the Research Process

Wish the Library could play a Stronger Role (Yes) — 79%

Currently Monitor Impact of Research Conducted (Very or Somewhat) — 79%

Currently Deposit Publications or Datasets into IR (Very or Somewhat) — 93%

ARLs May Be Doing More for Research Faculty Than Faculty Realizes

The survey shows that ARLs believe they are already highly engaged and supportive in the research process. Conversely, faculty has lower expectations as highlighted in Alterline's report Supporting Academic Research: Understanding the Challenges. From that report, and focusing on the same two specific tasks covered in this survey, 45% of faculty expected the library to provide research impact reports (compared to 79% in the current survey) and 42% expected the library to help deposit publications and datasets (compared to 93% in the current survey). This suggests that while research staff expect their library to assist with the process of research, they don't yet realize the extent to which their libraries already do.

Figure 19 : *Libraries report doing significantly more to support research administration than researchers realize.*

Expectations of Faculty vs. Actual Library Support for Research Activities

Legend:
- ■ Faculty Expectation
- ■ ARL Library Support

Activity	Faculty Expectation	ARL Library Support
Provide Research Impact Reports	45%	79%
Deposit Publications and Datasets	42%	93%

Conclusion

Academic libraries continue to be a proactive partner in the pursuit of scholarly achievement. They aspire to take this to the next level, especially in the context of teaching and learning as well as research.

Figure 20 : *Academic libraries wish to secure or expand their leadership position in these three areas.*

The Top 3 Opportunities for Academic Libraries
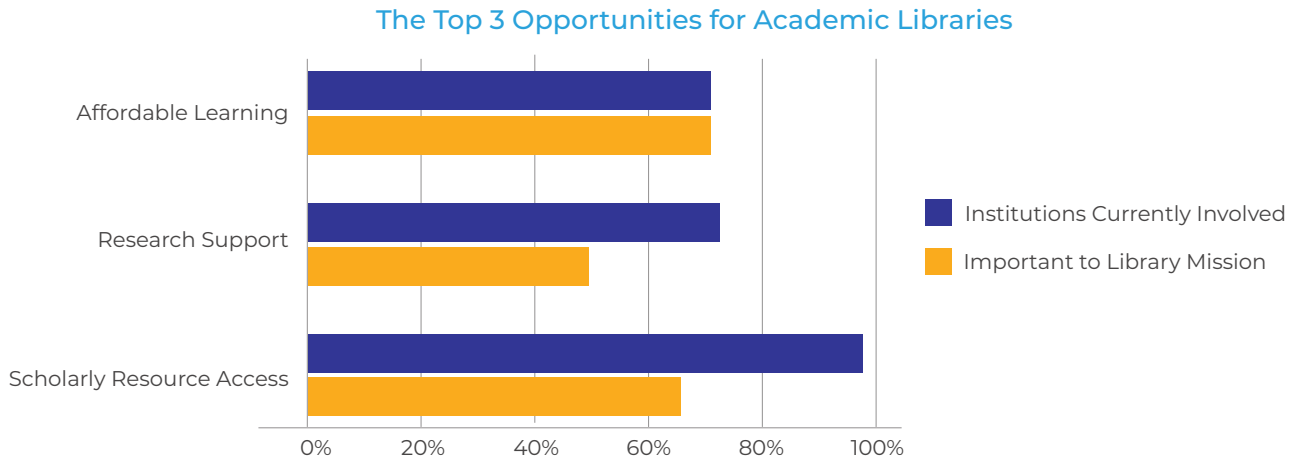
To realize these ambitions, libraries say they need more funding, with budgets and limited headcount already affecting the library's ability to fully realize its goals. But they remain confident that if they could demonstrate the value of the library to teaching, learning and research, they could successfully request a budget increase.

Figure 21 : *The majority believe they could successfully request an increase in library budget if they could "demonstrate the value that the library brings to teaching, learning and research".*

Can Libraries Justify Budget Increases by Demonstrating Increased Value?
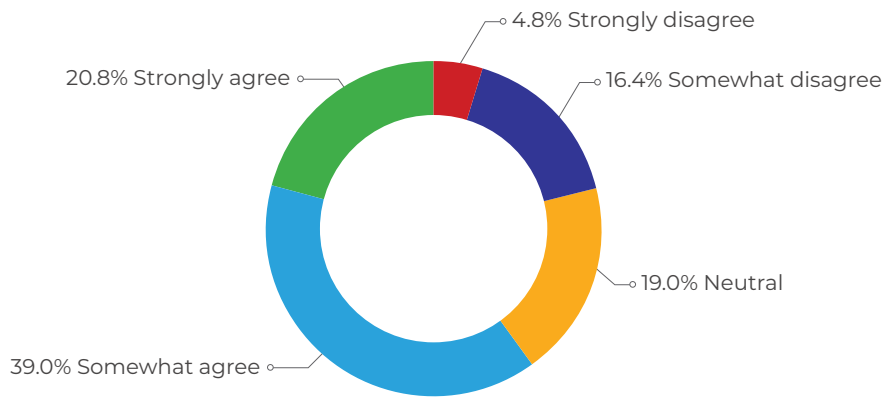
This latent opportunity, coupled with the reality that universities are not as likely to shrink their library budget, reversing three decades of incessant decline, presents an optimistic outlook for academic libraries as they continue to expand their sphere of influence, yet remain the heart of the institution.

Methodology and Demographics

This survey was designed to reflect the current state of affairs in the US Higher Education library institutions. Respondents were chosen to reflect institutions of all sizes and types. A total of 290 respondents answered, with 244 completing their surveys. The analysis presented in this document excludes incomplete surveys and blank answers on completed surveys where applicable. Programming, hosting and tabulation were all handled by Library Journal.

The survey is made up of primarily Post-graduate Institutions, with a total 70.1% of respondents reporting their institution furnishes Doctorate or Master's degrees. Baccalaureate Colleges made up 21.3% of respondents, while Associates Colleges came in slightly higher at 23.4%. The remainder of respondents identified their institutions as Special Focus or Tribal Colleges, 4.1% and 0.3% respectively.

Full time enrollment for institutions varied widely, with a 56.2 percent majority hosting 5,000 or less FTE per year, with the remaining categories making up from 5-10% of respondents each (See Figure 22). A simple majority of respondents also noted their job position as Director/Assistant Director or Dean of Library, making up 50.6% of total respondents (See Figure 23).

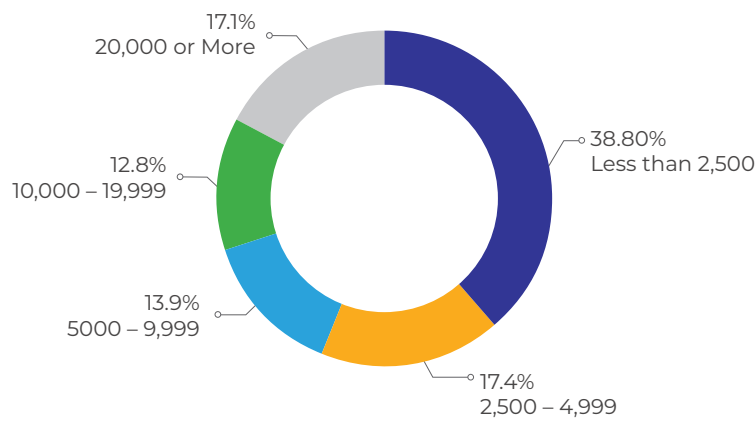**Figure 22 :** *Survey Demographics by FTE.*
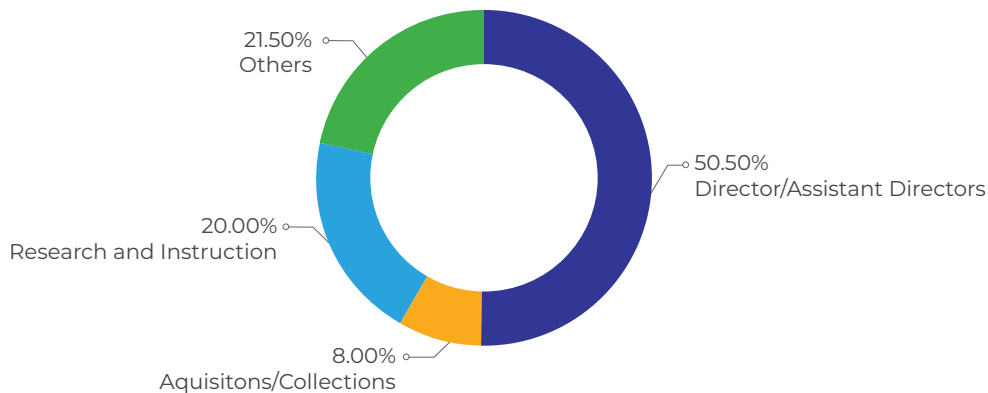

Figure 23 : *Survey Demographics by Job Category.*

Figure 24 : *Survey Demographics by Specific Job Function.*

Job Function	Percentage
Director/Assistant director of library	42.20%
Reference/Information services	9.10%
Dean of library	8.40%
Other	8.40%
Instruction/Teaching	6.90%
Technical services	5.80%
Acquisitions/Collections	5.50%
Cataloging	4.00%
Department liaison/Subject specialist	4.00%
Electronic resources	2.50%
Circulation	1.80%
Archives	1.50%