Association of College and Research Libraries

Environmental Scan 2003

Shannon Cary
Program Officer

Margot Sutton Conahan
Manager of Professional Development

Stephanie Orphan
Editor, *C&RL News* /Web Developer

Mary Jane Petrowski
Associate Director

Irving Rockwood
***Choice*, Editor and Publisher**

Hugh Thompson
Manager of Publications

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ACRL Environmental Scan 2003

Introduction
ACRL conducts an ongoing environmental scan to identify trends and emerging issues that may affect the future of higher education, academic libraries, and the association. The environmental scanning process seeks to identify trends and changes in key areas affecting ACRL and its members. The process involves accumulating information from a wide variety of sources and interpreting this information relative to the association and its members. When the scanning process is shared with the membership, it can become a useful tool in assessing the impact of these trends on all academic libraries.

Methodology
ACRL staff begin the scan process by reviewing a wide range of publications and other sources of information in the following areas: the economy, society, academic libraries, higher education, and professional associations.

Prior to beginning its research, staff identified a number of key areas that impact the environment of the association and its members, and the information that was subsequently acquired was organized into these areas. The principal categories are Economic Overview, Societal Overview, Academic Library Issues, Higher Education Trends, and Professional Association Trends, within which there are a number of subtopics. The implications of the data gathered for the both the profession and the association are stated in each section.

Summary of Implications
The current environment is exhibiting major developments in four areas, each of which will have significant implications for higher education, academic libraries, and not-for-profit associations. On the economic scene, the end of 18 years of economic growth and a bull market are causing major upheavals, and these shifts will affect many areas such as business, funding, jobs, and support for the association. Generational changes caused by the graying Boomers are creating impacts of shifting demographics. The electronic revolution is calling into question methods of information delivery that have remained little changed for several hundred years. These changes will have implications for academic libraries, from budgets to information delivery methods. Higher education also is being forced to reexamine assumptions and methodologies that have been in place for many years, as it also copes with the impacts of an electronic world and shifting demographics. Finally, professional associations must be ready to adapt their missions to meet the new challenges brought about by the effects of change on their members. Business plans must also be revamped to meet new realities caused by the either declining memberships, lean economic times, delivery of services, or members' changing needs.

Economic Change
- It seems unlikely that the bottom of the bear market has been reached. Mixed signals seem to imply that we are only at the beginning of a recovery and any given upcoming quarter could deliver either positive or negative results. "…we are in just the beginning stages of the current secular bear market. These cycles take lots of time, anywhere from 8 to 17 years. We are just in year three, and at nosebleed valuation levels. The next "surprise" or

disappointment will surely come from out of nowhere. That is why it is called a surprise. When it is followed by the next recession, stocks will drop one more leg on their path to the low valuations that are the hallmark of the bottom of secular bear markets." (Mauldin 2003)

- In light of the ongoing uncertainties related to the sluggish economy and budget cuts, ACRL's projections for revenue, such as professional development, advertising, and fundraising should be conservative. While there are indications that some revenue streams will rebound in 2004, growth is not predicted to return to the healthy levels of the late 1990s.
- The slow economy has had a negative impact on state budgets and endowments, which has led libraries to make cuts in materials budgets as well as staff. Cuts in materials budgets will lead to holes in collections of many libraries for this time period. Past experience shows that these holes are rarely filled at a later date. Simultaneously, cuts in staffing budgets will exasperate the problem of a shortage of academic librarians, which is partially due to low salaries.

Geopolitical Change
- Professional associations continue to deal with the repercussions of September 11. For ACRL, this included the creation of a "crisis management plan," revisiting legal documents to ensure liability protection, and the beginning of a new strategic planning process focusing on outcomes. Moving forward, ACRL should consider the "what if" questions when planning not only future events and strategic plans, but also when preparing budgets.
- Due to the increased restrictions on foreign students attending schools in the U.S., many of these students will to choose to attend European institutions.
- Because the Executive Branch is interested in expanding the USA PATRIOT Act, the library community will have to continue voicing its strong concern about balancing safety with the rights of patrons.
- In response to the USA PATRIOT Act, libraries need to make sure that all of their staff are well-trained in how to respond to legal requests from authorities. Librarians will also need to educate patrons on the USA PATRIOT Act and its effect on their privacy.

Generational Change
- As the US population moves toward retirement, associations are striving to demonstrate their relevance to older members while still appealing to younger audiences. ACRL will need to examine its organizational structure to ensure flexibility and facilitation of member participation across all generations. Moreover, ACRL may want to investigate the development of "generation-based" business practices with particular emphasis on generational marketing and communications to really reach the Gen X and Y audience.
- Recruitment efforts directed toward the Millennial generation could position the profession as part of the "creative class." (Yin 2003) Librarians surveyed by ACRL this year stated that they are drawn to academic librarianship because of the "opportunity to be creative," work with "intellectually stimulating people," and "invest in the development of a culture." (Meyer 2003).
- The Millennial generation, with its affinity for affiliation and teamwork, might reasonably be expected to embrace professional association membership.
- 77% of Baby Boomer librarians may want to continue working on a full or part-time basis. If demographic analysts are correct, only 23% of librarians (the "financial positives") will retire completely. (Morgan 2002)

New demands on higher education
- At the heart of the accountability movement is the belief that higher education is no longer "above the law" and must begin to produce tangible evidence that it is committed to improving student learning and achievement. Schools (and libraries) will very likely have to demonstrate in a more quantitative way that they have had a positive impact on student graduation rates, retention, transfers, etc. Accreditation commissions might cease to exist if the reauthorization of the Higher Education Act uncouples student aid funding from accreditation.
- A growing population will create increasing demand for higher education during the next 25 years. Continuing education in particular is a growth market. Forward-looking institutions will acknowledge this trend by developing new programs and services for seniors, working adults, and high school students. Academic librarians surveyed by ACRL in April 2003 believe that demographics are on their side saying that "there is a bright future for the profession" and the "employment outlook is good." (Meyer 2003)
- Adults are returning to school to expand their skill set in the wake of layoffs related to the economic downturn; many are choosing for-profits as more appropriate venues than traditional higher education programs.
- The use of technology continues to expand, with courseware being used to supplement traditional face-to-face courses in addition to delivering distance learning programs. Changes in the scholarly communication landscape have sparked a growing interest in institutional repositories and open source software is now available, removing barriers to implementation.
- Some higher education institutions may choose to get rid of file-sharing technologies on their campuses rather than face the liability of being responsible for illegal activity occurring on their networks.

ECONOMIC OVERVIEW

Introduction
Since March of 2000 when the principal stock averages attained historical highs, the stocks have been in a secular bear market punctuated by several significant rallies. In the latest of these, over the course of several months, stock averages have rallied some 26% due to the quick resolution of hostilities in Iraq, also known as the "war rally." However, during this time, major economic indicators have declined and job loss has increased.

"Today the S&P 500 is trading near 26x earnings, still almost in *official bubble territory* at 28x! Meanwhile it is only yielding 1.7% in dividends, abysmally low by *all* historical standards. Meanwhile the hyper-overvalued NASDAQ remains a classical bubble *to this day* at 38x earnings and yields nothing in dividends. These grossly excessive valuations reveal that today's US index levels remain far, far too high based on the actual collective underlying earnings power of the publicly-traded corporations that comprise them. Historical Great Bear bottoms *only* happen at general-market P/E ratios *under* 10x earnings and general-market dividend yields *over* 6%. (Hamilton 2003)

The outlook for the economy is mixed with signs of economic recovery appearing simultaneously with conditions that would undermine recovery. For example, structural

imbalances would seem to indicate that a correction has not fully run its course and further difficulties are ahead. Total debt is growing at unheard of levels. "The most recent year saw a budget deficit of over $300 billion…..It is projected that the upcoming year's budget deficit will also exceed $300 billion. These numbers do not take into account the rapidly growing current account deficit that grows at $450 billion per year." (Chapman 2003) "Coming up is roughly $44 trillion of unfunded liabilities, which includes Social Security, Medicare, normal government expenses, and interest on the national debt….We have a $10 trillion economy. How on earth is a $10 trillion economy going to service what's coming in the way of $38 trillion in debt?" (Russell 2003)

"Bond holders are beginning to bail out." (Russell 2003) Since June 2003, bond prices have declined severely, causing interest rates to spike by over a percentage point. This is expected to have adverse impacts on the refinancing boom, a major source of funds that consumers tapped to keep the economy at its current level. "…the 30-year Treasury is down over a point to new lows. This means mortgage rates are heading up. This means debt will be more expensive to carry. This means people and pension funds and mutual funds which are holding the long bonds are already down better than 15% since mid-June." (Russell 2003)

At the same time, there is evidence of early stages of economic recovery. The Wall Street Journal recently reported that "One of the biggest remaining obstacles to U.S. economic recovery is fading as industries are finally starting to whittle down ruinous overcapacity. Demand is picking up throughout the economy, and companies aren't increasing capacity to fill that demand. As a result, the imbalance is receding." (Ip 2003) It was further reported that "The U.S. economy in the second half of this year is expected to grow at it strongest pace in almost four years….at a seasonally adjusted rate of 4.7% during the current quarter and 4.0% in the fourth quarter." (Hilsenrath 2003)

Despite these positive signs, the jobs picture continues to look gloomy. "…people filing first-time claims for unemployment benefits rose in the week ending Sept. 6 [2003] to 422,000, from an upwardly revised 419,000 the week before. Economists generally believe a figure below 400,000 implies a stable-to-improving job market." (Hilsenrath 2003)

"The National Association for Business Economics forecasts that businesses won't add to payrolls this year—and the unemployment rate is likely to remain at 6%. That's an eight-year high. And if anything, that forecast is too optimistic." (Weiss 2003)

"The economy is coming in with numbers that are better than expected like durable goods today and auto sales (although the strength was from abroad) and productivity. The productivity numbers we believe reflect the layoffs rather than the work force producing more goods. …this economy correlates pretty closely to Japan where there were profit bulges and GDP spikes periodically during their 13-year bear market and financial malaise." (Comstock Partners, Inc. 2003)

Implications
- It seems unlikely that the bottom of the bear market has been reached. Valuations have increased during the most recent rally and price/earning ratios are again very high.

- The market will probably continue its decline, based on historical indicators, until the excess valuations caused by over abundant credit availability have been worked out of the system.
- There may be some evidence of improvement in the overall economy as past excesses in production capacity are worked out.
- The job situation continues to deteriorate, undercutting positive signs of economic growth and delaying recovery.
- Mixed signals seem to imply that we are only at the beginning of a recovery and any given upcoming quarter could deliver either positive or negative results. It is very unlikely that economic conditions will be described as robust in the next one to two years.

Effects on Higher Education

What might be the effects on higher education from the current trends in equities markets and the economy?

"The vast majority of colleges and universities lost money on their investments during the 2001-02 academic year, with the average endowment posting a return of minus 6 percent." (Pulley 2003)

The Council for Aid to Education reports, "The ripple effects of the floundering stock market and the poor economy are finally hitting home in college fund raising. Alumni giving, which the council calls 'the bedrock' of higher-education support, was off by nearly 14 percent, or about $1-billion, in 2002." (Blumenstyk 2003)

Many states are coping with significantly reduced tax revenues and the resulting severe budget deficits. "A worsening fiscal crisis has forced most states to make big cuts for the 2004 fiscal year." (Potter 2003a) "*State Budget Update: April 2003* estimates that 41 states are facing a cumulative budget gap of $78.4 billion for fiscal year 2004. Twenty-six states currently are examining proposals to reduce 2004 funding for higher education in an effort to close cumulative state budget gaps." (Higher Education and National Affairs 2003)

"California's public colleges are facing steep cuts in state appropriations after lawmakers finally agreed o a state budget that closes most of a record $38-billion defict. In all, lawmakers slashed more than $700-million from the $9-billion the state spends annually on higher education. Those cuts come on top of a series of reductions that were made in the last year." (Selingo 2003)

"The University of Colorado system, faced with a $44.8-million drop in state support, eliminated 500 staff and faculty positions, consolidated degree programs in journalism and engineering, and froze salaries." (Potter 2003b)

Implications
- Many institutions of higher learning are coping with reduced revenues from endowments, which have contracted significantly due to the stock market decline. Alumni giving has also been negatively impacted.

• In addition, institutions whose support derives in part from public funds are especially hard hit.

Effects on ACRL Business Operations
Because ACRL derives a major part of its revenues from sales of advertising, publications, and conference registrations, the state of the economy in general and of higher education in particular will have a direct impact.

It appears unlikely that budgets at both the state and federal level will overcome shortfalls within the next one to two years, thus the trends described above will likely limit budgets for all aspects of institutions' operations, including the library.

On the other hand, the economy has given some indications of a nascent recovery, which may lead to some improvement in advertising sales. The Jack Myers Media Investors Report for advertising spending projects "2003 growth slows to 3.1%: 2004 will be up a robust 5.3%." (Meyers 2003)

Implications
• Expenditures for many products and services, such as conference attendance, continuing education, publications, and serials, are expected to be level or show a slight decline over the next two years.
• Advertising sales for ACRL scholarly journals may show improvements over previous years, although from very low levels.

SOCIETAL OVERVIEW (MJP)

Population Growth: The U.S. population will increase 25% by 2025 (exceeding 350 million). Growth will be fueled by steady birth rates, mass longevity, and sustained immigration. Population growth over the next 25 years will exceed the growth over the past 20. (Wellner 2003).

Increased Diversity: By 2025 the term "minority" may be almost obsolete as non-Hispanic whites will comprise 60% (rather than 70%) of the U.S. population. The Hispanic population will double to 70 million (19% of the U.S. population) and Asians will make up 7% of the population. The black population is projected to grow faster than the white population at a rate that falls between that of Hispanics and Asians. (Wellner 2003; 2002).

Delayed Retirement: 50 has become the new 30 for many Boomers. Baby Boomers, having delayed marriage and children, are expected to postpone retirement. By 2025 the number of people over 60 will double to 70 million. Within this group, the "upbeat enjoyers" (24%) don't believe they will ever retire and plan to work when they find it convenient or interesting to do so. They anticipate taking courses and expanding their intellectual horizons. The "insecure" (25%) lack financial resources and will have to continue working. The "threatened actives" (28%) want to continue working but on their own schedules. They do not view retirement as a time to grow

and cultivate new interests. The "financial positives" (23%) are the only group not planning to work during their retirement. (Morgan 2002)

Lifelong Learning: The changing nature of work and the economy mean that Americans will continue to seek out and invest in educational services throughout their lives. Students can be 20, 30, or 60. Educational attainment continues to rise: the number of college graduates has increased from 5% in 1940 to 26% of the population in 2002. Income is a compelling reason: in 2000 men with a college degree earned 79% more than their peers with a high school diploma. In 2000, 59% of workers said they planned to continue their education after high school. As Boomers shift their desires from material things to the enjoyment of experiences, some futurists believe there will be an explosion in "educational programs that stir the imagination, travel that broadens one's perspectives, entertainment that stimulates the mind, art that enraptures the spirit, and religion that inspires the soul." (Francese 2003, Staff 2003)

Rise of the Creative Class: The work force involved in technical, artistic, and cultural occupations has grown significantly over the past century, giving rise to a new term, "creative class," to describe the 38 million workers who "produce new ideas, technology, or creative content." This group constitutes almost one-third of the current work force and includes those working in education, science, engineering, arts, music, entertainment, architecture, design, business, law, finance, and health care. Locales that are magnets for creative workers (like major research universities or institutions) can expect to see strong increases in employment, population, and general prosperity. (Yin 2003)

The Millennial Generation: As the Millennial generation (born after 1982) moves into young adulthood over the next 20 years, futurists foresee "higher standards, improving behavior, more social cohesion (even conformity), closer attachments to parents, more institutional trust, longer-term life planning, and greater collective optimism." They will take fewer risks, display more teamwork, marry and have children at a younger age, and seek a balanced life. (Staff 2003).

Culture of Copy: We are living in a culture that values cutting, pasting, cloning, sampling, quoting, airbrushing, customizing, recycling, re-circulating. A generation ago none of these things were possible. We have moved from a culture that values "reproduction" over production. "D.J.'s, file sharers, handbag cloners, student plagiarists, and some bloggers simply do what brand companies do: they reproduce work made elsewhere at lower rates, adding their own signature and mix." In a recent study, 38% of 18,000 students surveyed said they had lifted material from the Internet for use in papers last year. File sharers admit that they would stop only if faced with serious financial consequences. (Leland 2003)

Civility Crisis: Giovinella Gonthier, author of *Rude Awakenings: Overcoming the Civility Crisis in the Workplace,* describes impact of growing workplace incivility, the tendency for people to be increasingly very abusive to the people they work with ("office rage"). A recent study found that of workers who had been treated rudely, half said they lost work time worrying about the rude behavior directed toward them. A third admitted to intentionally reducing their commitment to the company. Nearly a quarter said they stopped doing their best work, and 12 percent quit their jobs. Academe is not immune to the civility crisis as more colleges employ conflict

resolution therapists and faculty complain of increasingly disruptive behavior in the classroom. (Fogg 2003, Hahn 2002, Young 2003)

Implications for Academic Libraries
- A growing population will create increasing demand for higher education. Academic librarians surveyed by ACRL in April 2003 believe that demographics are on their side saying that "there is a bright future for the profession" and the "employment outlook is good." (Meyer 2003)
- As many as 77% of Baby Boomer librarians may want to continue working on a full or part-time basis. If demographic analysts are correct, only 23% of librarians (the "financial positives") will retire completely.
- Minority recruitment may become easier by 2025 as growing numbers of Hispanic, Asian, and Afro-American students seek higher education.
- Understanding the bigger cultural picture with respect to "copying" may enable librarians to work more productively with faculty and students.
- Uncivil behavior in the classroom (and in the library) has become an additional stressor for public service librarians.

Implications for Higher Education
- Continuing education is a growth market. Forward-looking institutions will acknowledge this trend by developing new programs and services for seniors, working adults, and high school students.

Implications for the Association
- Recruitment efforts could re-position the profession as part of the "creative class." Librarians surveyed by ACRL this year stated that they are drawn to the academic librarianship because of the "opportunity to be creative," work with "intellectually stimulating people," and "invest in the development of a culture." (Meyer 2003).
- The Millennial generation, with its affinity for affiliation and teamwork, might reasonably be expected to embrace professional association membership.
- We can expect more demand for "behaviors-that-burden-the-workplace" type workshops (already offered twice as a sold-out ACRL preconference).

ACADEMIC LIBRARY ISSUES

Changes to Intellectual Property Rights
As information is becoming more readily available, various commercial forces are working with legislators to make information more expensive and amenable to strict market control. The academic community has started to feel the effect of the Digital Millennium Copyright Act (DMCA), which provides special copyright laws for digital materials. One of the biggest examples of implementation of the DMCA regards file-sharing on campuses and will be addressed later in the environmental scan. Fortunately, over the past 12 months there have been positive developments on the copyright front, including the dissolution of UCITA and attempts by legislators to regain the balance between copyright holders and the users of copyrighted works.

- On January 15, 2003, the U.S. Supreme Court, on a 7-2 decision, upheld the Sonny Bono Copyright Term Extension Act, which allows for lengthier copyrights that protect works for a period of 70 years after the death of the creator, and 95 years for corporations that own copyrighted works.
- In response to the courts decision that Congress has the power to determine copyright, Representative Zoe Lofgren (D-CA) introduced the Public Domain Enhancement Act (HR 2601), a bill intended to address the issue of lengthy copyright protection. HR 2601 would create a mechanism by which copyright owners who wish to be protected by the additional 20 years of protection granted by the Copyright Term Extension Act of 1998 would be required to pay a $1 fee 50 years after the work was published and every 10 years thereafter. If the copyright owner does not pay the fee, the work would go into public domain. If the copyright owner does pay the fee, there will be information on file so that the copyright owner may be easily contacted for the permissions process.
- In June, Representative Martin Sabo (D-MN) introduced the Public Access to Science Act (PASA) (H.R. 2613), which would require that research "substantially funded" by the public would not be available for copyright protection and would enter directly into the public domain.
- According to a Reuters report in September, legislators are once again considering a database protection act. Legislators are "circulating a proposed bill that would protect wholesale copying of school guides, news archives and other databases which do not enjoy copyright protection." (Sullivan 2003) Fortunately, at a hearing on the legislation "Republicans and Democrats in the U.S. House of representatives reacted coolly and sometimes even negatively." (Foster 2003)
- The National Conference of Commissioners on Uniform State Laws (NCCUSL) decided not to expend further resources to promote the Uniform Computer Information Transactions Act (UCITA) in state legislatures and to discharge the UCITA Standby Drafting Committee.

Implications:
- The copyright issue will remain an uphill battle, but growing public recognition of the concerns should help the library community. (Albanese 2002)
- The biggest concerns for librarians in the area of copyright will continue to be maintaining fair use access to electronic materials.

Internet as Information Provider
Students and faculty continue to turn to the Internet with increasing frequency to meet their research needs. While faculty and graduate students recognize the need to evaluate information on the Web, undergraduates do not necessarily share this understanding. In addition to general Web surfing, students frequently turn to resources such as the Internet Public Library and Google Answers as an alternative to seeking librarian assistance.
- A recent study showed that seventy-nine percent of college students feel that Internet use (including email use to contact instructors, etc.) has positively impacted their academic experience (Ye 2003).
- For a study on the scholarly information environment commissioned by the Digital Library Federation and the Council on Library and Information Resources, Outsell Inc.

interviewed 3,234 faculty members, graduate students, and undergraduate students from public research universities, private research institutions, and liberal arts colleges.

- o While approximately 60% of faculty and graduate students responded that information that they research comes from the library, "on average, 58.08 percent of faculty members' and graduate students' information needs relating to research are reportedly met by the Internet." (Friedlander 2003).
- o 66.53% of undergraduate students reported using Internet sources for their coursework compared to 58.84% of graduate students.

- *The UCLA Internet Report* found that "In 2002, 60.5 percent of all users considered the Internet to be a very important or extremely important source of information . . ." and very experienced users ranked the Internet higher than books, television, radio, newspapers, and magazines as an important source of information. In addition, "52.8% of users believed that most or all of the information online is reliable and accurate" (down from 58% in 2001); however, a third of users said that only half of the information on the Internet is reliable and accurate.

- The Internet Public Library (IPL) gets approximately 1,000 email reference questions each month, answering around 80%. IPL receives and estimated 12 million hits a month, half of which are from students working on reports. (Oder 2003)

- An "exploratory" study by Cornell University librarians in 2003 comparing Google Answers research results to those of academic librarians found that Google Answers researchers tended to provide primarily Web-based responses and those who did cite other resources presented the need for a trip to a library in a negative light. Despite this, "there was no clear 'winner' in terms of responses to the questions posed." (Kenney 2003)

Implications:
- The library must work with teaching faculty to promote the understanding among students that quality of information matters and provide instruction on how to evaluate information.
- Librarians will need to keep abreast of new Internet services and trends among their users to ensure that libraries are providing all of the services that their users expect to have available.

Increased Educational Role for Librarians

More Accountability for Student Learning: Embracing and assessing the educational role of academic librarians will become more critical as the federal government considers imposing more quantitative accountability measures of student success on higher education, potentially changing the accreditation process. Higher education is about to enter an era of heightened accountability for student learning, and it will be important for all libraries to begin (or continue) to use new assessment tools (such as the National Survey of Student Engagement, ARL's LibQual, Outsell's benchmarking survey) to identify areas for educational leadership, program improvement, and collaboration.

The three-year-old National Survey of Student Engagement, for example, shows that student learning is strongly correlated with high levels of academic challenge and expectation. Challenge

is measured, in part, by the numbers of written papers over five pages; coursework that emphasizes making judgments about the value of information, arguments, or methods; synthesizing and organizing ideas, information, and experiences; working with a faculty member on a research project. Libraries must demonstrate that they are a vital part of a campus environment that provides support to help students succeed academically.

*ACRL Survey Results***:** New academic librarians view themselves as educators and see libraries changing their focus: "Libraries are transitioning from a learning center to a teaching center." They feel challenged by the need to "work harder on relationships" which entails a "difficult cultural shift" requiring them to "spend more time out of the library." New librarians surveyed stated that the "opportunity to work with students" is their primary reason for choosing academic librarianship. 9% of those in the ACRL focus groups identified "information literacy/fluency" and "student engagement/teaching" as the top two issues facing them personally. One of the "big audacious goals" for ACRL posited by members was to "achieve universal recognition for the importance of the academic librarian in the educational process." "Supporting information literacy" was identified as a core value to be included in the next ACRL strategic plan. (Meyer 2003)

*Opportunities***:** According to a recent survey, faculty plan to spend more time integrating web content, tools, and applications into their teaching and are using more web technology in connection with course development. (McGraw-Hill Ryerson 2002) However, the library is missing from most course web sites. Courseware administrators on campus are not putting library resources into course web sites even though doing so has occurred to many of them. Faculty are anxious to collaborate with librarians: "It helps to get the library involved and to realize the full potential of course software." Courseware companies are beginning to include librarians on development committees and are phasing out connections to commercial content providers. (Carlson 2003)

The Gates Foundation will create 15 "early college" high schools in California. (Evelyn 2003). This represents a unique opportunity for school and academic libraries to collaborate on new educational services to support this new initiative.

Knowledge management is an area that should be more fully envisioned and championed by librarians on behalf of their campuses. Knowledge management could be a bridge from instruction to a more comprehensive model of "institutional search requirements and dilemmas that could inform or reform not only the way library services are delivered, but as host of other campus information services as well." (Ray 2003).

Faculty quoted in the academic press during the past year flagged a number of areas where librarians could be exercising more educational leadership:

> "Students need instruction from professors, librarians, or both in how to combine web and print research effectively." (Tenner 2003)
> "Students don't know how to cite information found on the Internet." (Foster 2003)
> "Students lack skills to write lengthy, sophisticated research papers." (Bartlett 2003)

"Students have this idea that there is no difference between searching on the Web and searching in the library." (Carlson 2003)

"The case for librarians' information literacy instruction role could be made more positively and comprehensively as a managing or developing information role. The current literacy language invites librarians to be seen in a social welfare role, ministering to illiterates rather than as professionals working with intelligent students and faculty." (Ray 2003)

Implications for Libraries
- Libraries can expect to feel more pressure to demonstrate their contribution to/impact on student learning/student success next year if Congresses attaches more stringent accountability measures to Higher Education Act reauthorization.
- Libraries should review their institution's results on the National Survey of Student Engagement to better understand the current level of student learning/engagement and how they might contribute to improvements. In the new accountability culture, it will be more important to measure contributions to student learning than student satisfaction with library services.
- More academic librarians need to leave their cultural silos and work with instructional technologists and faculty to integrate library databases and other materials into course web sites.
- New projects (like "early colleges") are opportunities for librarians to exercise collaborative leadership in the development of innovative educational services.

Implications for the Association
- Educational leadership is challenging. Librarians will need more support for and opportunities to acquire leadership training in order to become more comfortable and effective in their roles as educators. The ACRL/Harvard Leadership Institute and the ACRL Immersion Programs should be continued and possibly expanded in collaboration with other schools.
- The "early colleges" development suggests an area for partnership between ACRL and AASL.
- If the federal government re-defines assessment measures for accreditation commissions, ACRL standards and guidelines may need to be revised.

Library as Place

The "Invisible Semester": More students are taking classes in the summer in part because of the poor economy and partly in order to finish their degrees more quickly. Institutions are also looking to make better year-round use of expensive facilities. (Young 2003)

*Building Boom in California***:** Rising enrollments are fueling a library building boom in California. Proposition 47 was approved in November allowing the state to issue $13.05 billion to pay for construction and renovation of education facilities. 59% ($384 million) is slated for library-related projects. (*LJ Academic Newswire* 2002)

Joint-Use Libraries: The concept of joint-use libraries received renewed attention this year with the opening of the San Jose Library, a university/public library partnership. The concept has been a focus of interest both nationally and internationally since the 1970s. The new San Jose Library is strongly committed to supporting lifelong learning. (Albanese 2003)

Focus Group Thoughts: Participants in the 2003 ACRL focus groups believe that in the next five to ten years the "library will increasingly be viewed as a 'set of services' rather than a 'place.'" Others noted that even though use of the library is down during the day, library hours have been extended at many places with many offering "24-hour study rooms." Other observations: libraries are becoming more like Starbucks, allowing students to bring more food and drinks into the library; that there is an increased need for off-campus access (proxy service); that libraries are increasingly used as gathering places for students to work on group projects. (Meyer 2003)

Archives Matter: In order to fulfill the expectations and needs of future researchers, libraries were reminded this year of their responsibility to "shape the research opportunities of posterity, to collect boldly and prospectively; to seek tomorrow treasures in material that would otherwise be lost forever." (Tenner 2003)

Implications
- Increasing enrollments are projected for the next ten years and libraries that do not expand will be under pressure to provide not only more space but also more small group workspace. New libraries might want to pay particular attention to creating spaces where faculty and students can meet and work together.
- As campuses move to year-round utilization, libraries may need increased staffing and more programs.

Digitization: Access and Preservation
As digitization becomes more prolific, next steps are becoming apparent in regards to new tools for managing digital content and issues that move beyond the logistics of presenting traditional print resources in digital form.
- Digitization continues to augment traditional preservation efforts in libraries as well as providing deeper access to special collections materials.
- Linking and other forms of product integration are major trends among digital content providers and aggregators as a way to help libraries maximize their resources.
  - JSTOR now offers article-level linking tools and has established linking relationships with major database providers, such as EBSCO, OCLC, and Proquest.
  - "Proquest and CSA also see broad-based linking as a major trend for 2003." (Tenopir 2003).
  - Beth Dempsey, manager of corporate communications at Gale states that "new technologies and publishing models that produce integrated, interconnected information services that unite all types of information . . . will find a welcome audience." (Tenopir 2003)
- Content that is "born digital" or "new-model scholarship" presents a challenge for librarians. Items such as open-ended projects and articles published only on the Web

(thus falling outside the realm of traditional scholarship guidelines) require librarians to make decisions regarding the long-term value of content and to work with creators when making preservation and access decisions.

Implications:
- The expectation of seamless integration of digital content from a variety of sources into the library catalog or Web site will continue to grow and vendors will need to stay ahead of the curve in offering libraries integrated products.
- As digitization projects move beyond the library to include born digital projects and scholarship within the academic universe at large, the role of digital librarians will expand and guidelines for assessing these new forms of information must be developed.

Digitization: Institutional Repositories
The launch of MIT and Hewlett-Packard's DSpace institutional repository system in fall 2002 and subsequent release of its open-source software has provided a model for the development of institutional repositories and paved the way for their low-cost implementation.
- Clifford Lynch defines an institutional repository as "a set of services that a university offers to the members of its community for the management and dissemination of digital materials created by the institution and its community members" and states that "At the most basic and fundamental level, an institutional repository is a recognition that the intellectual life and scholarship of our universities will increasingly be represented." (Lynch 2003).
- Collaborating institutions in the DSpace Federation Project include: Cambridge, Columbia, Cornell, MIT, Ohio State University, the University of Rochester, the University of Toronto, and University of Washington.
- The Canadian Association of Research Libraries has developed an Institutional Repositories Pilot Project.

Implications:
- With interest in and recognition of the need for institutional repositories matched with the availability of the necessary technology for implementation and examples of existing projects, more and more institutions will seek to develop repositories to capture the intellectual activity of their communities.
- The success of institutional repositories will require collaboration across nearly all units of an institution. Librarians' skills and experience provide them with the potential to emerge as campus leaders in this area.

The Rowecom bankruptcy debacle
Academic libraries represent a major market for publishers of scholarly journals, books, and electronic resource materials. However, few academic libraries can afford to maintain and manage working relationships with the huge number of publishers whose materials are of potential interest. As a result, many rely heavily on book and subscription vendors who act as their intermediaries with publishers.

Price competition, substantial cash requirements, and continuing pressure to offer new and enhanced services have long ensured extremely narrow profit margins among these vendors. These pressures have in turn contributed to industry consolidation, resulting in a steadily shrinking pool of major, full-service, vendors.

This past year, industry pressures proved too much for one of the larger and better-known subscription vendors, RoweCom/divine (nee Faxon/Rowecom), which filed for bankruptcy in early 2003 with little or no advance warning. The RoweCom bankruptcy took a particularly stunning turn when company officials disclosed they lacked funds to fill more than $70 million dollars worth of publication orders for which they had already received payment from libraries. RoweCom officials alleged that the missing monies had been siphoned off by divine, the troubled parent firm which shortly followed its subsidiary's lead by also filing for bankruptcy. (*LJ Academic Newswire* January 2003)

A disaster-in-the-making for academic libraries was narrowly averted by an initiative spearheaded by the leading academic subscription vendor, EBSCO, at the urging of the RoweCom/divine creditor committee. Under the terms of a hastily devised but ultimately successful initiative, EBSCO offered to assume responsibility for servicing the subscriptions of all interested, former, RoweCom/divine customers. Libraries who accepted the EBSCO offer became "participating libraries" and were asked to assign their rights as creditors to "participating publishers." These publishers, in turn, agreed to grace all 2003-2004 subscriptions from participating libraries, regardless of whether they, the publishers, had received payment, which in most cases they had not. All told, more than 70 percent of affected publishers agreed to participate in this initiative, including ALA and, of course, ACRL/CHOICE.

Final resolution of the RoweCom/divine and divine bankruptcy proceedings will not occur for some time. Nonetheless, it seems clear that EBSCO and the participating publishers effectively shielded academic libraries from the financial consequences of the RoweCom/divine bankruptcy. (*LJ Academic Newswire* June 2003.) They were less successful in shielding them from the inconveniences involved, but this may simply have been too much to ask.

For publishers, the outcome of the RoweCom/divine bankruptcy is best thought of as a holding action. By directly and generously supporting their customers and EBSCO, the participating publishers undoubtedly gained some desperately needed good will. More pragmatically, they helped themselves by averting, or at least reducing the scope of, a potentially massive loss of circulation, much of which might have proven difficult to recover. The cost was substantial, some $70 million. Larger publishers, of course, incurred the highest costs, which in some cases must have reached well into 7 figures. The pain was widespread, however, affecting even smaller houses such as CHOICE, whose losses are currently estimated at approximately $75,000. Whether publishers as a group will find that the benefits gained equals the expenses involved over the longer term remains to be seen. However, the 70 percent of affected publishers who participated in the EBSCO offer appear to have been motivated by two basic objectives, making the best of a bad situation, and doing the right thing by their customers. (*LJ Academic Newswire* August 2003.)

Implications
- The RoweCom bankruptcy provides confirmation of the continuing pressures on vendors that contribute to vendor consolidation; academic libraries can anticipate, the probability of further consolidation in the vendor industry.
- Academic libraries will need to pay closer attention to the financial health of these mission-critical firms, many of which are privately held, making it more difficult to monitor their financial health.

Book publishing environment and its effect on academic collections
Book publishers who produce materials suitable for the academic library market are a highly heterogeneous and diverse group, ranging in size from extremely small nonprofit organizations publishing in a single, specialized subject area to large, multinational, commercial houses that publish across the entire range of scholarly subject matter. These houses, a fuzzy and fluid subset of the 73,000+ firms listed in Bowker's *Booksinprint* database, may be broken down in various ways:
- By type of ownership: non-profit versus commercial
- By size: small, medium, and large
- By geography: US versus international
- By industry category: retail (trade), professional, college, school, mass market, mail order, religious, university presses, etc.
- By percentage of sales coming from the academic library market

Among the book publishers who account for a significant proportion of the new titles purchased by academic libraries, are two groups of particular interest. Both rely heavily on the academic library market:
- University presses, e.g., Oxford, Harvard, etc.
- Commercial scholarly book publishers, e.g., Greenwood, Marcel Dekker

Both groups have been directly affected by the well-documented and extended decline in academic library monograph purchases over the past 15-20 years. Among those libraries responding to the 2003 *Against the Grain* Annual Survey, for example, 75% reported decreasing or flat book budgets with the average decrease being 15%. ("Annual Survey Report," *Against the Grain*, February 2003.) An August 2002 report from the New York-based Primary Research Group (PRG), based on data from a national sample of 66 academic libraries, noted that academic libraries have "significantly cut spending on print resources…with spending on books down nearly 6 percent from the previous year." ("Study Shows Academic Libraries are Buying Fewer Books," *Library Journal Academic Newswire.* September 5, 2002.) Similarly, during the period 1986-2002, ARL library monograph purchases declined by an average of 5 percent while monograph expenditures increased by 62 percent, 2 percent less than the CPI. (*ARL Statistics 2001-2002*, Association of Research Libraries, Washington, DC.)

Declining academic library sales have inevitably had a negative effect on scholarly book publishers. University presses, in particular, have been adversely affected. Library purchases of university press books were down over 12 percent in 2002, a year in which total university press hardcover sales declined by 26.8 percent and paperback sales by 9.8 percent. (*Library Journal Academic Newswire.* November 7, 2002.) While university press sales recovered somewhat in

2003, the long-term prospects for these presses remain questionable. Although university presses publish nearly 15 percent of the number of new books published annually in the US, most are relatively small houses with limited resources. Projected 2003 university press sales as of June, for example, were $458.3 million, less than 2 percent of total projected US book industry sales. ("BISG Sees Book Sales Rising 2.7% in 2003," *Publishers Weekly.* June 9, 2003, p. 19.)

Evidence of the difficult market conditions facing university presses can be found in the recent reorganizations, restructuring of publishing programs, director turnover, and cutbacks at University of Wisconsin Press, University of California Press, Stanford University Press, Indiana University Press, University of Massachusetts Press, Columbia University Press, to name but several of the more prominent examples. While all of these incidents, received at least some public notice, perhaps the single most representative incident was the firing of William Strachan, the Columbia University Press director, who was publicly dismissed in February 2003 for the press's "poor financial performance." Symptomatically, the Columbia position remains open as of this writing pending completion of a university-initiated review of the press's financial future. Long noted for their commitment to the scholarly monograph, high editorial standards, and reasonable pricing, US university presses face a challenging future. (*LJ Academic Newswire* July 2003.)

Commercial publishers are, of course, hardly immune to the pressures facing university presses. Typically, however, they respond in at least one way that seldom occurs among university presses—mergers and acquisitions. Like university presses, commercial scholarly book publishers cope with difficult market conditions by attempting to lower their costs—both fixed and variable, by cutting back output in selected subject areas, and by expanding output in more attractive areas. In addition, however, they also play the merger game as larger and more successful houses purchase smaller competitors in search of increased profitability…or simply increased odds of survival. In a sign of the times, at least one well-known commercial scholarly book publisher—a frequent CHOICE advertiser—now publishes its entire list via print-on-demand (POD) technology, hoping to recoup its investment on sales of 150 copies per title, or less. Similarly, one of the largest commercial book publishers, Greenwood, restructured its publishing program in the fall of 2002, eliminating an entire department by outsourcing production and jettisoning all but two of its many imprints—Greenwood and Praeger.

Implications
- Academic libraries can expect to see fewer university press titles in specialized subject areas with historically poor unit sales, e.g., many fields in the humanities; in addition, total university press output may decline.
- Some university presses will close. While smaller presses are most vulnerable, larger presses are not immune as the recent cutbacks at California and the uncertain future of Columbia indicate.
- There will be continuing consolidation among commercial scholarly book publishers accompanied by a restructuring of editorial programs.
- Scholarly monograph prices, which have increased much less rapidly than serials since 1986, are likely to increase more rapidly in the future.

- Scholarly book publishers will continue to develop new electronic products, but at a relatively modest rate until they are more certain of the market for these materials.

The Role of E-Books in Library Services

E-books appear to be overcoming their tenuous beginnings and growing overall as an industry, despite the fact that major retailer Barnes & Noble.com has discontinued its sale of e-books.

- There are currently over 400,000 titles available in various e-book formats, from more than 400 publishers (Rogers 2003).
- The Open eBook Forum, the electronic publishing industry's trade and standards organization, has released statistics showing that e-book sales revenues are up by 30% and unit sales up by 40% over the same period in 2002. The Association of American Publishers reported that the e-book segment grew from $211,000 in net sales in January 2002 to more than $3.3 million in January 2003.
- The software used to display e-books has improved significantly.
- Aggregators are expanding their offerings of e-books and integrating e-books with other products:
  - netLibrary, as part of OCLC, is now redirecting its business towards libraries. (Rogers 2002)
  - Gutenberg-e, a collection of digital history monographs, was launched to "provide a cost-effective model for peer-reviewed publications in specialized fields to replace the crumbling monograph market." (Rogers 2002)
  - In October 2003, Gale is introducing its Virtual Reference Database, a new program that integrates e-reference book in database interface.

Having been burned by several previous electronic publishing "revolutions" dating back to the 1970's, scholarly book publishers have responded with varying degrees of enthusiasm to the e-book phenomenon.

- Licensing selected titles to e-book aggregators, e.g., netLibrary, Questia, and ebrary. This has been perhaps the most popular course of action, in part because it is the least expensive from the publisher's perspective.
- Issuing their own electronic editions of some or all of their titles, e.g., ABC-CLIO which is, as far as this writer knows, the only major scholarly book publisher currently issuing electronic editions of all new titles.
- Offering free Web access to the content of new print titles. To date, the only publisher who appears to be doing this is the National Academy Press. While NAP reports that offering free Web access to its titles has had a beneficial impact on print revenues, few if any other publishers appear to have followed its lead thus far. (Jensen 2001.)
- Establishing a separate, dedicated, publishing program whose sole purpose is to develop and publish electronic titles. Since this is a relatively expensive and risky option, fewer scholarly publishers have ventured into this terrain. Most of the firms making this leap, e.g., Greenwood, Grove Dictionaries (now owned by Oxford), and Columbia University Press, appear to be focusing on reference materials.

Implications:
- While academic libraries may remain wary of collecting in the area of e-books, despite their "comeback," e-books will increasingly be pushed to libraries through other vendor services.
- The continued trend of e-book acceptance and growth in the market will lead to user demand for more e-books, prompting libraries to reexamine collecting in this area.
- While a steadily increasing proportion of scholarly books will be available in electronic form directly from publishers, academic library purchases of these titles will probably be a function of the as yet uncertain financial health and viability of e-book aggregators such as netLibrary, Questia, and ebrary.

Serials publishing environment and its effect on academic collections
Like scholarly book publishers, publishers who produce serials suitable for the academic library market are a highly heterogeneous and diverse group, ranging in size from extremely small nonprofit organizations publishing in a single, specialized subject area to large, multinational, commercial houses that publish across the entire range of scholarly subject matter. In general, three major types of publishers produce the lion's share of scholarly journals:

- Commercial houses, commonly known as STM (Scientific, Technical & Medical) publishers. While these vary considerably in size, the half dozen or so largest account for a significant percentage of industry revenues. The largest and most dominant STM publisher, Elsevier, has long been a target of criticism for its pricing policies and monopolistic behavior. Commercial houses currently publish some 2,700 STM journals. By comparison, university presses publish only 700. (AAUP-Quick Facts, http://aaupnet.org)
- Professional associations. These societies, which often publish the "journal of record" within their field, play a major role in the tenure and scholarly communication process. However, during the past several decades, many societies outsourced their journal publishing programs, turning over production, marketing, subscription management, distribution, and related activities to an outside publisher—either commercial or nonprofit—while retaining editorial control. The publishing programs of those societies that continue to publish their own journals range in size from a single journal with limited circulation to substantial programs such as that of the American Chemical Society— currently 26 journals strong.
- University presses. Although they are major suppliers of scholarly books, university presses play a less significant role in the serials arena, which is dominated by commercial houses. However, serials published by university presses tend to be much less expensive than those from commercial STM houses, and their prices increase less rapidly. Whereas the average price for a biomedical journal published by a nonprofit publisher increased by 129.3% from 1988-1998, the comparable figure for an STM journal from a commercial house was 223.9%. (AAUP-Quick Facts, http://aaupnet.org)

Much of the current animus between librarians and publishers is a direct byproduct of the pricing policies and behavior of commercial STM publishers, with Elsevier in particular often singled out as a particularly bad example. While there are arguments to be made on both sides, the explosive increase in serial prices in recent decades has been well documented and by itself explains much of what is currently known in academic library circles as the

"serials crisis". For example, ARL libraries report the following increases from 1986-2002. (*ARL Statistics 2001-2002*, Association of Research Libraries, Washington, DC.)

- Average serial cost—227%
- Average serial expenditures—227%
- CPI—64%
- Serials purchased—9%

With serial costs increasing at a much higher rate than library material budgets, most academic libraries have been increasingly hard pressed to maintain their serial collections, let alone expand them. The resulting pain has in turn given rise to an extended debate about the nature of the scholarly communication process, the role of publishers—especially commercial publishers—in that process, and a search for less expensive alternatives to the current journal publishing model. This debate has in turn spawned a number of new initiatives, the two most prominent of which at the present time are the "open access" movement and SPARC.

If the future of e-books remains cloudy, there is little doubt that electronic journals are here with a vengeance, and here to stay. In 1994, for example, there were fewer than 75 peer-reviewed electronic journals. By early 2002, online journals accounted for 34% of the citations in *Arts & Humanities Citation Index,* 63% of those in *Social Sciences Citation Index*, and 75% in *SCI*. (*Library Journal,* April 15, 2002). The electronic journal explosion of the past decade has created new opportunities for publishers and libraries alike…and new challenges as well.

Today, there seems little doubt that the future of the scholarly journal is wholly electronic, or nearly so, and libraries and publishers are scrambling to adjust. From a user standpoint, electronic journals are increasingly seen as a superior alternative to print. Some 84 percent of faculty and students surveyed at Drexel University reported that they prefer electronic journals to print, believing that electronic journals save time and make more information available. (*Charleston Report*, November/December 2002.)

Unfortunately, the economics of electronic journal publishing have worked out somewhat differently than many librarians and publishers initially hoped. While the distribution cost of electronic journals is much lower than is true for print, indeed the marginal cost approaches zero, total fixed costs are typically higher. Furthermore, the continued rapid evolution of Web technology—coupled with user expectations—imposes continuing development costs on electronic journal publishers, who are continually reinvesting in and reinventing their ever larger and more complex Web platforms. As a result, it is the larger houses with the deeper pockets that currently set the pace in electronic journal development. Some of the smaller houses, hard pressed to keep up, have chosen to partner with nonprofit aggregators, e.g. BioOne, Highwire Press, and *Project Muse*, in lieu of attempting to develop their own Web platform.

Implications
- The electronic revolution in serial publishing will continue until all, or virtually all, scholarly journals are available in digital format.

- Large STM publishers will continue to set the technical standards for Web development.
- Electronic journal pricing will stabilize over the next few years, but electronic journals are unlikely to prove significantly cheaper than print.
- Electronic journals will not, therefore, solve the "serials crisis".
- Smaller publishers will continue to be at a disadvantage in the capital-intensive electronic journal arena; as a result, some of the smaller and more specialized scholarly journals may not survive the transition from print to electronic.

Impact of Electronic Serials Subscriptions on Collection Continuity (Licensing vs. Ownership)

Mergers of electronic subscription providers have the potential to drive up journal prices, which impacts collection decisions. Also affecting the integrity of electronic serials collections are the decisions of some publishers to remove articles from their databases.

- The library community opposed the acquisition this summer of BertelsmannSpringer by private equity firm Cinven and Candover, which had already acquired Kluwer Academic Publishers in early 2003. The Information Access Alliance (of which ACRL is a member) urged the Justice Department to block the merger over concerns that "the transaction will result in reduced access to critical research information . . . Over the last two decades, the prices libraries pay for journals have risen at three times the rate of inflation." ("Information Access Alliance" 2003).
- Developments such as Elsevier's decision to remove journal articles from its database that it feels are the result of plagiarism or other research misconduct, while protecting academic integrity, leave librarians dealing the effects of "here today, gone tomorrow" articles.
- Other instances of disappearing content include the discontinuation of PubScience at the end of 2002, the removal of most of the Tribune papers from Lexis/Nexis, CSA's removal of its indexing/abstract files from Ebsco*host* and Dialog, and Sage Publications removal of its content from Ebsco*host* and Proquest. (Tenopier 2003)

Implications:

- The mergers and acquisitions environment within the library industry will likely remain strong. Librarians will need to vigilantly keep track of these changes and encourage library groups to continue to make their voice heard.
- In addition to consolidation of services, publishers will continue to make business decisions that result in their removing content from particular vendor databases and/or the development of guidelines for removing individual pieces of content. Librarians will need to reassess their serials collection development policies and will be increasingly challenged by the need to maintain a balanced collection within shrinking budgetary constraints.

Open access and other alternatives to traditional publishing of scholarly communication

"Open access" is a work in progress that currently lacks a universally accepted definition. However, one point on which most proponents are agreed is that open access means free, non-exclusive, access to content. While open access publishers assume responsibility for all of the traditional publishing tasks—vetting, editing, production, and distribution—they neither request

nor require an exclusive grant of publishing rights from the author who is—with some limited exceptions—essentially free to publish and distribute the same article in other venues as he or she sees fit. This is true, for example, for both of two best-known and most ambitious open access initiatives currently underway, Public Library of Science (PLoS) and BioMed Central.

Beyond this, open access is perhaps best understood an alternative revenue model in which the cost of publication is transferred from subscribers to some other party, either authors or institutions. Thus, instead of charging subscription fees, publishers of open access journals attempt to recoup the costs of publication either by charging authors a publication fee upon acceptance of their article or by waiving such fees for authors affiliated with institutions willing and able to pay an—often substantial—annual fee to support the journal involved, or some combination of the two. As critics have pointed out, some of these funding models smack of "borrowing from Peter to pay Paul". In addition, they may have unintended consequences. If, for example, university X agrees to pay an annual fee to support open access journal Y, from where in the university budget will this money ultimately come, especially if the journal in question is now "free"? Such questions could well have implications for library materials budgets.

SPARC, which is also discussed elsewhere in this document, represents an alternative approach to the serials crisis. The goal of SPARC is simply to encourage the development and publication of lower-cost journals that can either replace more expensive existing ones or, by providing price competition, help restrain future price increases. SPARC, like open access, remains a work in progress. The $64 question is whether SPARC's efforts will, in fact, have a beneficial impact on serial prices or will instead simply result in the addition to the literature of a new set of admittedly less expensive journals that academic libraries will need to acquire? As of this writing, it is still too early to tell.

> ### *Implications:*
> - "As in previous years, journal prices went up, monograph sales declined, and librarians confronted ever-tightening budgets. But as digital technology reshapes the way scholars, students, and researchers work, creative, library-driven solutions are emerging." (Albanese 2002)
> - Current initiatives such as "open access," SPARC, and institutional archiving may signal the beginning of a transition to a new and less-costly era in scholarly communication; if successful, these initiatives may also have unintended consequences.

Declining Funding
The slowdown in the economy has had a large negative impact on state governments. Many states are making across the board cuts that adversely affect publicly funded higher education. Libraries are struggling to maintain services with flat or reduced budgets.
- Responding to a loss of nearly ten percent in state funding for universities, the library system at the University of Michigan will lay off 15 full-time employees, cut 16 vacancies, and turn 11 full-time jobs to part-time ones." Despite the cuts, the library's materials budget has been preserved, but it will depend more on endowment income. (*LJ Academic Newswire* (date) 2003)

- Libraries in nearly every state are experiencing fiscal pain. ""This is a budget crisis,' declared Helen, Spalding." Spalding stated in a *Library Journal* interview that in Missouri when state tax coffers came up short, "cuts to higher education made up nearly 37 percent of the state's deficit. (Albanese 2002)
- Some libraries, such as Dartmouth, reported that decreased endowment returns were also affecting their budgets. But there are reports that endowments are starting to post positive returns again. According to a study from the Commonfund Institute, "U.S. educational institutions reported positive endowment returns in the fiscal year ending June 30." (*LJ Academic Newswire* September 2003)

Implications
- The director of the University of Michigan libraries stated that due to budget cuts, "patrons may see a slower response in some areas, including shelving of some materials, cataloging of new materials, and interlibrary loans." (*LJ Academic Newswire (date)* 2003)
- Spalding stated that the University of Missouri-Kansas City library "delayed paying bills, stopped all purchasing, stopped all hiring, gave up money we reserved for open positions, and scavenged where we could." (Albanese 2002)
- Many libraries will have to cut materials budgets as well as staff. Cuts in materials budgets will lead to holes in collections of many libraries for this time period. Past experience shows that these holes are rarely filled at a later date.
- Cuts in staffing budget will exasperate the problem of a shortage of academic librarians, which is due to partially to low salaries.
- Library directors will spend more time fund-raising as libraries become more dependent on donations to operate.

Homeland Security/War on Terrorism (Libraries)
In 2001, Congress passed the USA PATRIOT Act almost without dissent, but in 2003 there was increased focus and often criticism about certain aspects of the law, especially Section 215. Among its detractors are over 150 communities, several major cities, and three states that have passed resolutions against the act. Several legislators have introduced bills that would amend the act to address the concerns of librarians, booksellers, and others who are concerned about the privacy of citizens. Simultaneously, the Department of Justice has launched a campaign to pass an expansion of the USA PATRIOT Act. ALA has been deeply involved in the discussion about the affects of this act on patrons' privacy.
- Section 215 modifies the rules on records searches. Due to the enactment of the PATRIOT Act, holders of business records, which includes library records, can be searched without your knowledge or consent, providing the government says it's trying to protect against terrorism. (Lithwick 2003)
- One of the frustrating aspects about the PATRIOT Act for those who have concerns about the affect of the act on privacy is that the implementation of the act is classified information. The Freedom to Read Foundation, along with three other groups, filed a lawsuit October 24 under the Freedom of Information Act to learn how many subpoenas have been issued to libraries, bookstores, and newspapers under the act. But it was ruled that the Department of Justice has a right to keep secret the specifics about the use of the act. (*LJ Academic Newswire* November 2002)

- On July 31, 2003, Senator Russell Feingold (D-WI) introduced the Library, Bookseller, and Personal Records Privacy Act. The bill would amend the PATRIOT Act to protect the privacy of law-abiding Americans and set reasonable limits on the federal government's access to personal information under the Foreign Intelligence Surveillance Act (FISA).
- On July 31, 2003, Senators Lisa Murkowski (R-AK) and Ron Wyden (D-OR) introduced the Protecting the Rights of Individuals Act. This bill contains many provisions that will help to restore some protections of civil liberties weakened by the PATRIOT Act.
- Representative Bernie Sanders (I-VT) introduced the "Freedom to Read Protection Act," HR 1157, March 6. HR 1157 would return the standards for the FBI to obtain FISA court orders and warrants to investigate library patrons and bookstore customers to the pre-PATRIOT Act standards. Under this legislation, the FBI would still have access to these records with a court-ordered search warrant but some type of reasonable cause would be required, instead of the lower standard created by the USA PATRIOT Act.
- ALA's advocacy on this issue has already affected change from the government. In a call to ALA's President, U.S. Attorney General stated that he was committed to declassifying the Justice Department report on Section 215.

Implications
- Because the Executive Branch is interested in expanding the Patriot Act, the library community will have to continue to voice its strong concern about balancing safety with the rights of patrons.
- In response to the USA PATRIOT Act, librarians need to have a plan, including a chain of communication in place, and to visit with their legal council frequently. (*Library Journal* Academic News Wire 12/3/2002)
- Librarians will need to educate patrons on the USA PATRIOT Act and its affect on their privacy. Citizens are more accepting of their transactions being tracked by the government and business. "It's been such an incremental process, everyone's gotten used to being tracked," said Charlotte Twight, author of *Dependent on D.C.* (Kansas City Star 11/24/02)

Recruitment, Retention, and Education of Librarians

Retention: According to the U.S. Census Bureau, the number of people between the ages of 50 and 69 is expected to leap 87% over the next fifteen years. A recent survey of ACRL members revealed that 46% of librarians plan to continue working part-time in the field after they retire. (Meyer 2003) Other demographic studies predict that 37% of the 50-69 cohort plan to work part-time in their primary career while 51% plan to start a second career. 76% are not confident that they will have enough income to retire. (Smith 2003) We do not know how many academic librarians view themselves as "upbeat enjoyers," "insecure," "threatened actives," or "financial positives" (terms coined by demographers to further segment the Boomer population and predict retirement plans).

Education: Recent ACRL research shows that academic librarians are very concerned with "adapting to changing technology," the need for increased specialization, administrative issues (budget, politics, workload), and professional development. 40% of those surveyed have a strong interest in advancing the profession. They believe there is a shortage of middle managers.

By 2001, nearly one-third (17 of 56) of ALA-accredited library schools had been incorporated into larger academic units, typically joining a communications, journalism, or media school. Mergers have tended not to affect programs pursuing "policies of growth, initiating broader non-LIS programs." Student enrollments and curriculum innovation have not been affected by incorporation. "The days of the standalone LIS school with only one product—the ALA-accredited master's degree—is over." (Koenig 2002)

Recruitment: Recent ACRL survey data provides valuable insight into what motivated people to join the profession and how they came into the profession. 80% of those surveyed indicated that librarianship was a second career. 30.5% joined the profession because of a general interest in higher education/research/independent research libraries. Almost 20% became academic librarians as a result of an enjoyable paraprofessional experience. 29% worked as a paraprofessional before obtaining the MLS degree. The "intellectual stimulation of the job" (79%), workplace environment (72%), and geographic location of the job (35%) were all "very important" factors in the decision to become an academic librarian. (Meyer 2003)

Implications
- Part-time retired librarians may reduce staffing costs while retaining key staff with valuable expertise, experience, and connections.
- ACRL survey data confirms what other studies have shown: paraprofessionals have been and remain the best source for librarians. (Rogers 2003)
- Recent programs to recruit academic librarians from the ranks of Ph.D.s make sense in light of ACRL membership survey research showing that some academic librarians were former teachers.
- Recruitment efforts could better articulate the "creative class" benefits of the academic librarianship ("the opportunity to be creative," work with "intellectually stimulating people," etc.).
- The shortage of middle managers indicates a continuing need for professional development opportunities (like the ACRL/Harvard Leadership Institute) to help librarians acquire the leadership vision and skills need in upper-level administrative positions.
- The growing Hispanic population (noted earlier) suggests a need for more multilingual librarians.

Access to Government Information
Several developments over the past year have led to a decrease, or a possible decrease, in access to government information. At the same time there have been positive developments in the area of electronic access to government information, especially passage of the E-Government Act.
- On December 17, 2002, President Bush signed the E-Government Act of 2002 into law. This law is designed to promote federal initiatives on the Web. The legislation, passed by

both the House and Senate November 15, "funds an e-government department in the Office of Management and Budget, creates a board to assess technologies to foster cooperation among government agencies, and establishes a program to evaluate and fund new antiterrorism technologies." ("E-Government Act" 2002)

- Having persuaded the Energy Department to pull the plug on PubScience, a Web site that offered free access to scientific and technical articles, commercial publishers are taking aim at government-funded information services offering free legal and agricultural data. (Matthews 2002)
- On November 1, 2002, President Bush issued Executive Order 13233, Further Implementation of the Presidential Records Act (PRA). The PRA declared that the official records of former presidents should be readily available to the public. This order gives an incumbent or former president veto power over any public release of materials, even after the 12-year restriction period stated in the PRA has expired. Senator Jeff Bingaman (D-NM) has introduced a bill that would repeal Executive Order 13233.
- Education researchers, social scientists, and library representatives have charged that the Education Department is preparing to delete information from its Web site, in part because the material does not reflect the philosophies of the Bush administration. The Education Department says that it is updating the Web site to make the initiatives of the administration prominent, but it will archive old information. (Monastersky 2002)
- On August 12, the Government Printing Office (GPO) and the National Archives and Records Administration (NARA) released a press release that announces an agreement between the two agencies to ensure that "the documents you see today on GPO Access (www.gpoaccess.gov), the GPO web site that provides free online public access to more than 250,000 Federal Government titles, will remain available permanently."
- Several changes to ERIC have been proposed that are of great concern to academic librarians. Although ACRL and other library groups have spoken out about these changes, it appears that the changes will probably be made.

Implications
- Restriction to government access will continue to be a problem under this administration. This has a harmful long-term effect on scholarly research.
- In the current climate, services previously provided by the government, such as databases, will continue to be eliminated under the guise that there are private entities that more efficiently provide these services.
- Due to passage of the e-government bill, there should be better federal executive branch management of information over its lifecycle, with public access being a key focus.

HIGHER EDUCATION TRENDS

Accountability (MJP)
Higher education faced mounting criticism this year from the federal government, the American Council of Trustees and Alumni, and the National Center for Postsecondary Improvement for its failure to develop a "culture of evidence" that would "create measures and collect data on outcomes" in order to "redesign practices for improving quality." (Morgan 2002)

The Higher Education Act comes up for renewal next year and the government has clearly signaled its intention to push for more specific accountability measurements in accreditation reviews. (The current legislation links accreditation to eligibility to receive federal funds.) The focus will be on "success with respect to student achievement" (as reflected in graduation rates, retention, transfers, employer satisfaction, etc.) In short, higher education could be asked to "grade" itself in order to receive federal student assistance funds. (Burd 2003)

Accreditation commissions have come under attack for "vague, widely varying standards" and failure to penalize weak schools. (Gose 2002) Not surprisingly, accreditation agencies oppose any move to impose across-the-board quantitative accountability measures, saying that higher education is "too complex" to be assessed strictly by the numbers. Nonetheless, at least one accreditation commission (North Central) has developed an alternative accreditation process based on the U. S. Commerce Department's Malcolm Baldridge National Quality Award Program. (Farrell 2003)

A number of specific areas were singled out as needing more (or better) accountability measures including teacher education programs (Bassinger 2003), doctoral program rankings (Brainard 2002), affirmative action plans (Shireman 2003), and scientific research (Ehrenberg 2003). Business schools adopted new standards requiring them to "set goals for what they want their students to learn, and then create ways of measuring whether they've succeeded." (Mangan 2003)

Participation in the National Survey of Student Engagement (NSSE) is increasing because it allows schools to respond to "external demands for evidence about student learning." (National Survey of Student Engagement 2002)

Implications for Higher Education
- Accreditation commissions might cease to exist if the reauthorization of the Higher Education Act uncouples student aid funding from accreditation.
- At the heart of the accountability movement is the belief that higher education is no longer "above the law" and must begin to produce tangible evidence that it is committed to improving student learning and achievement. Schools (and libraries) will very likely have to demonstrate in a more quantitative way that they have had a positive impact on student graduation rates, retention, transfers, etc.
- More schools will participate in the National Survey of Student Engagement because it is the only assessment tool currently available that allows institutions to document "the extent to which they engage in educational practices associated with high levels of learning and personal development." (National Survey of Student Engagement 2002)

Implications for Libraries
- The educational role of the library is going to become increasingly important as all parts of the campus community begin to take a harder look at impacts on student learning. Libraries can affirm and strengthen their role in the academic process by demonstrating how services and programs enrich the educational experience of students, contribute to a supportive campus environment, enhance student-faculty interaction, and support active and collaborative learning.

Implications for the Association
- ACRL standards and guidelines may need to be re-visited if accreditation measurements change in 2004. Future standards for academic libraries will need to be aligned with the trend toward assessing learning outcomes, academic quality, and institutional effectiveness.

Continued rapid growth of distance learning programs (MJP)
According to the latest statistics from the U.S. Education Department, enrollment in credit-bearing distance-education courses in the 2000-01 academic year increased by 114% since 1997-98. The latest survey shows that 56% of two- and four-year institutions are offering distance education courses. "Distance education is not replacing traditional higher-education institutions, it's allowing these traditional higher-education institutions to make their courses and faculty expertise available to a whole new set of students who otherwise would not be able to participate for whatever reason—because of time or cost constraints or geographical and location constraints." (Kiernan 2003)

On November 2, 2002, the "Technology, Education and Copyright Harmonization Act" (the TEACH Act), part of the larger Justice Reauthorization legislation (H.R. 2215), was signed into law by President Bush. TEACH redefines the terms and conditions on which accredited, nonprofit educational institutions throughout the U.S. may use copyright protected materials in distance education—including on websites and by other digital means—without permission from the copyright owner and without payment of royalties.

> *Implications for higher education*
> - Distance education is the new revenue stream for higher education with colleges and universities reaching out to develop new niche markets (like the University of Wisconsin has done for high schools wishing to obtain advance placement credit). (Carnevale 2002)
> - Rising student enrollments may force the federal government to reduce regulatory impediments to online education. Federal law current makes students ineligible for federal funds if more than half of an institution's student body study via distance education.
> - Increased enrollments are a measure of student satisfaction with distance education.

Increase in Use of Technology for Instruction
The *Campus Computing Project* reported tremendous growth in the use of email and other information technology services from 1997 to 2001. College courses using email in instruction

grew from 33% to 64% during that time period; the proportion of courses relying on Internet resources for instruction grew from 25% in 1997 to 53% in 2001; and the use of class Web pages grew from a slight 14% of courses in 1997 to approximately 47% in 2001. (Ye 2003). Not only is technology use growing, but professors and students alike credit it with contributing to a successful educational experience.

- A 2002 survey found that 83% of higher education faculty members in the U.S. and Canada feel that web-based technology is a key contributor to student success. Survey participants also reported that they plan to "spend more time integrating web content, tools and applications into their teaching and use more Web technology in course delivery." (McGraw Hill-Ryerson 2002).
- A study by the Pew Internet Life Project showed that email is the primary tool used by students to contact professors to turn in assignments, set up appointments, discuss grades, report absences, and seek clarification of assignments; 46% of the students surveyed answered that email enables them to better express ideas and thoughts to professors.
- Curt Bonk, professor of educational psychology and instructional system technology at Indiana University, believes that online learning will complement traditional general education courses for undergraduates and that there will be growth in blended learning. (Jorgenson 2003)
- In a Babson College/Sloan Consortium survey of approximately 3,000 chief academic officers and college presidents, "One-third of respondents said online education would be superior to in-class instruction at their institutions within three years. And 57 percent said Internet-based courses at their colleges were already at least equivalent to lecture-hall counterparts in educational quality." (*Chronicle*, September 19, 2003)
- The same survey reported that more than 1.6 million students took at least one online course in fall 2002.

  Implications:
  - Technology usage in education will continue to grow in support of expanding online learning programs and augmenting traditional face-to-face courses.
  - The opportunity is ripe for librarians to stake a claim in the online environment by partnering with professors and ensuring that the library has a presence within courseware. Many libraries are already offering virtual services, which could be tied directly into materials within courseware packages.

Impact of For-Profit Education
While universities struggle with their own attempts at for-profit education, privately run online schools, such as University of Phoenix Online, Corinthian College, and Career Education continue to thrive. Despite this, analysts believe that for-profits face increased competition from the thousands of online courses launched at mainstream schools in fall 2003. However, proposed changes to the definition of "higher-education institution" in the "Expanding Opportunities in Higher Education Act of 2003" would allow for-profits to compete with traditional institutions of higher education in new ways for federal funds.

- In September 2003, the University of Phoenix received approval from its a creditors to create a School of Advanced Studies and offer three new doctoral programs (business administration, education, and health-care administration).

- Many workers have chosen to pursue further education in the face of a slow economy, and they are often choosing for-profits because of high graduate placement rates, the focus on developing work skill sets, and scheduling and location flexibility.
- After two years, Columbia University dissolved its for-profit online learning venture, Fathom, which was designed to sell Web-based courses and seminars to the public. The venture was never profitable and cost millions. Partners included the British Library, the London School of Economics and Political Science, the University of Chicago, and the University of Michigan System.
- U. of Maryland University College, NYU and Temple have also dissolved their for-profit online-learning ventures.
- The National Center of Education Statistics reports that enrollments in distance-education courses rose 89 percent to 3.1 million between 1998-2001. (Associated Press 2003)
- Changes in the definition of "higher-education institution" to include for-profits, would make them "eligible for millions of dollars of aid from a variety of federal programs." (Burd 2003). This compares to current restrictions that do not allow for-profits to receive federal money to improve their institutions and expand their educational offerings.
- For-profits also support legislation that would make transferring credits from their institutions to traditional higher educational institutions easier. (Farrell 2003)

Implications:
- While for-profit growth rates level off, traditional institutions of higher education will continue to expand their online offerings and more will begin to branch into offering online certificate programs, which more directly complete with for-profit education.
- If proposed changes to the "Higher Education Act" are passed, traditional colleges and universities will find themselves competing for federal funds earmarked for creating curriculums, facilities, and endowments at schools with a high proportion of minority and low-income students. If they cannot successfully compete for these funds, they will need to develop alternative funding models to compensate for lost income.

File-sharing on campuses
In October of 2002, the recording industry announced that they expected higher education institutions to become involved in an effort to stop individuals and Internet Service Providers from downloading music files off the Internet. Throughout 2002 and 2003, the recording industry has made it a high priority to eliminate file-sharing of music files. A debate on this issue is currently taking place between the recording industry and groups and individuals affected by the recording industry's action.
- According to an October 25, 2002 article in *The Chronicle of Higher Education,* the letter stated that "colleges should inform students about the proper use of copyrighted materials, specify the permissible use of the campus network, monitor compliance with that policy, and 'impose effective remedies against violators.'"
- On November 6, the Electronic Privacy Information Council (EPIC) sent an open letter to college and university presidents, acknowledging the rights of copyright holders but asking the higher education administrators to recognize also the rights of the public. Specifically, EPIC focuses on the fact that the constraints that the

industries wish to place on the use of electronic data far exceed the constraints placed upon print media.

- In response to these letters, ACRL sent a letter to all academic library directors informing them of these letters and of ACRL's position on this issue. In the letter, it is stated that ACRL agrees "that peer-to-peer networking file sharing is a campus problem that, along with facilitating the distribution of unauthorized copies of copyrighted work, uses valuable bandwidth and affects overall campus network operations," but ACRL disagrees "with the implication that all file-sharing activities are infringements of copyright that constitute piracy." The letter also states that ACRL believes "that any discussion of this subject must acknowledge that rights of users of copyrighted materials form the basis for the balance of copyright law." The letter urges "librarians to help advise college and university administrators on copyright policy."
- On September 8, 261 lawsuits were filed by members of the Recording Industry Association of America (RIAA) against individuals they accuse of illegal music file-sharing. The RIAA is seeking damages of up to $150,00 per song.

Implications:
- Libraries could be adversely affected by these lawsuits because some higher education institutions may choose to get rid of file-sharing technologies on their campuses rather than face the liability of being responsible for illegal activity occurring on their networks. This technology is the same technology that could be employed for digital libraries.
- People between the ages of 18 and 29, and college students in particular are the biggest downloaders of Internet music. (Zernike 2003) Given the severe consequences that could come to students engaged in illegal downloading, librarians will have to work with faculty to teach students about the copyright law in this area.
- Colleges and universities will have to devote significant resources to complying with the laws and addressing subpoenas. Some institutions may follow the lead of Boston College and MIT, which fought the validity of subpoenas issued to the institutions. (*Library Journal* Academic News Wire 6/24/2003)
- It is possible that the actions of RIAA will spark a backlash and that the Digital Millennium Copyright Act, which is the law that RIAA is invoking, will be revisited.

Homeland Security/War on Terrorism (Higher Education)
Since the terrorist attacks of September 11, institutions of higher education have had to contend with changes to the ways they deal with foreign student and with research on topics that might affect national security.

- A letter that the Federal Bureau of Investigation has sent colleges requesting certain information about their foreign students has prompted the Association of American College Registrars and Admissions Officers to remind colleges what data they do and do not have to give federal investigators. (Chronicle, 11/26/02)
- The Association of American Universities released a statement on Friday urging institutions to remain committed to academic freedom while the nation prepares for war and defends itself from terrorists. (Chronicle 1/20/03)

- The U.S Immigration and Naturalization Service released final rules in December governing its database to monitor and track international students studying in the United States. Colleges must now report if their international students acquire practical training related to their fields of study. (Chronicle 12/12/02)
- Institutions that possess potentially dangerous biological agents and pathogens for use in research will have to register with the U.S. government. According to rules released by the federal government, "restricted Persons" may not have access to these select agents. Among the restricted individuals are people who have been committed to a mental institution, anyone who is an unlawful user of any controlled substance, any noncitizen who is in the country illegally, and any person from one of the countries on the State Department's list of nations that sponsor terrorism. (Chronicle 12/12/02)
- Since the September 11 terrorist attacks, university officials say the number of government-research contracts with restrictive clauses has increased greatly. An example of these restrictions is a clause in one contract that prohibits non-U.S. citizens from "all or certain aspects" of research. (Chronicle 11/1/02)

Implications
- Due to the increase restrictions on foreign students attending schools in the U.S., many of these students will to choose to attend European institutions.
- Higher education institutions will focus on research areas that attract federal dollars, such as those related to terrorism and Middle East Studies.

Student Demographics (MJP)

International Students: International student enrollments are declining. Since 9/11, applications for student visas are down as are the number of visas being issued. This marks is the first significant decline since 1948. (Jacobson 2003) Although 28% of foreign students choose to study in the U.S., they account for only 3.5% of total U.S. student enrollment. Why do students attend school in the U.S.? It students a 15% return on their investment. India sends the most students to the U.S. (Galbraith 2002) Australia, Britain, Canada, Ireland, and New Zealand are increasing their market share. Australia is increasingly attractive to international students because it can offer "an American-style learning experience with few of the drawbacks that attending college in America entails, such as fears for personal security, high living costs, and big tuition fees." (Cohen 2003)

Time to Degree & Post Degree: Students are completing four-year degrees sooner than they did eight years ago (it now takes 4.8 years on average vs. 5.3 years in 1992-93), but the proportion of students earning degrees in four years continues to decline. (Rooney 2003) Factors affecting completion time include delayed entry, transfers, GPA, and parents' educational attainment. 59% attend more than one institution during their undergraduate years. One year after graduation 77% of graduates work full time making a median annual salary of $33,000. About 22% enroll in graduate or advanced degree programs. (Higher Education and National Affairs 2003)

Student Debt: Students with significant student-loan debt are less likely to enroll in graduate school. (Millett 2003) In 2002 the average new graduate carried an estimated debt of $22,000.

Student debt functions as an "anti-dowry" according to some analysts who believe it is responsible for the 15% increase in delayed marriages and 22% increase in postponed childbearing. (Carlson 2002)

Rising Enrollments: Total enrollments in higher education expected to continue growing. By 2012, enrollments will rise by 13.5% to 17.7 million students. Part-time enrollments will also increase, but more slowly. Full-time enrollments are projected to increase 16% between 2002-2012 from 9.3 to 10.9 million. Part-time enrollments of women over 30 will increase 7% (and represent the largest segment of the part-time demographic). (Infocus 2002) The stalled economy has created a more competitive job market leading students to seek more degrees. Non-traditional students are also returning to the classroom to gain new skills to improve their economic prospects. Public universities and community colleges are overcrowded because more students are seeking affordable education. (Rooney 2002) Admission is getting more competitive: students apply to six or more colleges and 69% attend their first choice.

Increasing Diversity: While the number of white undergraduates is projected to rise to 10 million by 2015 (up from 9.5 million in 1995), their representation as a percentage of all undergraduates will drop to 62.8% (from 75.9% in 1989-90). Minority students made up one-third of the student population in 1999-2000, up from one-fourth in 1989-1990. The enrollment of women and minority students has increased faster than that of men and white students in the past thirty years. More women are seeking higher education than men (56.3% of all students). (Crawford 2003)

Academic Preparation and Student Engagement: High schools are not preparing students for college. The high drop-out rate crosses all racial and ethnic lines. ACT scores indicate that students are not prepared for first-year science and math courses; writing skills are also inadequate. (Rooney 2003) By the end of their first year, students have adjusted socially but many struggle academically. (Young 2002) Nineteen percent of full-time first-year students spend only 1-5 hours per week preparing for class. Only 12% spend more than 26 hours. 63% spend 15 or fewer hours. (Young 2002) Another study finds that the average college student spends a very small percentage of his or her in class or hitting the books: "Students spend 1.7 hours in class per day, on average, and other 1.6 hours studying. The rest of the day—when they're not working (2.6 hours) or sleeping (6.8 hours)—is up for grabs. Essentially, that leaves 11.3 hours for students to party (or do whatever else college students do)." (Gardyn 2002) The National Survey of Student Engagement found that 58% of first-year students and 49% of seniors reported doing 4 or fewer papers 5-19 pages in length per academic year. 52% of first-year students and 58% of seniors said they were asked to read fewer than ten books per year. (Young 2002, National Survey of Student Engagement 2002) Some critics believe that faculty and students have made a tacit "disengagement contract" that reads "if you don't bother me too much, I won't bother you too much. I'll trade you a B if you trade me some peace of mind." (Young 2002)

> *Implications for Higher Education*
> - Diversity in the classroom: fewer numbers of international students will be offset by rising minority enrollments.

- New accountability measures could require colleges to improve minority retention rates.
- Because students are coming to campus not only under-prepared but also as believing that "copying" cultural products is a "creative and interactive" endeavor, educators will be increasingly challenged to help students embrace the intellectual and ethical life of academe.
- Rising enrollments will stretch and strain existing facilities and services.
- Escalating student loan debt will continue to exert downward pressure on graduate school enrollments as students become increasingly reluctant to assume greater debt.
- 12.1% of the U.S. population was below the poverty line in 2002. (James 2003). If poverty rates continue to increase as they have for the past two years, more students will graduate in debt.

Faculty Demographics (MJP)

More Adjunct Faculty: "The number of part-time faculty increased by 79% from 1981 to 1999, more than 400,000 out of a total of one million instructors over all." Reasons: economic recession and large increase in college-age student enrollment. 82% of part-time faculty members and two thirds of full-time, non-tenure-track professors do not have a doctorate. Despite wide disparities in pay and benefits, nontraditional and traditional faculty members reported similar levels of job satisfaction. 57% of fine arts faculty are part-time (the discipline with the largest proportion). (Walsh 2002)

Doctoral Degrees Declining: The number of doctorates awarded by American research universities in 2001 fell to a level not seen since 1993, with the largest decrease in science and engineering. The number of doctorates earned by men has declined steadily for the last five years. Women constituted 49.5 percent of the US citizens who earned doctorates in 2001. The number of doctorates earned by minorities declined across the board. Report suggests that women with families and others are re-evaluating the time commitment and opting for shorter programs in law and business. (Fogg 2002)

More Part-Time Women: "The percentage of women who are full-time faculty members in American higher education rose only five percentage points in the 75 years from 1920 to 1995." Why? Over 80 percent of women become mothers and work fewer than 50 hours a week year-round while academic jobs require 50+ hours per week. (Williams 2002)

Attitudes Towards Students: A recent survey found that faculty report "paying significantly more attention to undergraduates—both inside and outside the classroom" but felt their institutions were more concerned with "increasing their prestige." (Wilson 2002).

New Generation of Scholars: New faculty are increasingly interdisciplinary in their training and research interests. "It has been suggested that interdisciplinary programs, centers, and institutes might replace departments." (Gonzalez 2003)

Implications for Higher Education
- The number of individuals earning doctorates is decreasing at a time when college enrollments are growing and retirements are increasing. This could create some severe staffing shortages if the trend continues.
- Students with significant student-loan debt are less likely to enroll in graduate school and this may be factor in the decline.

Implications for Libraries
- Adjunct and part-time faculty may pose greater challenges to librarian-faculty collaboration, especially on curricular reform issues like information literacy.
- The demands of motherhood may explain why there is an academic librarian recruitment problem. Many academic and research librarians have to meet the same P&T standards as faculty.
- Libraries may need to re-align collection development in light of shifting departmental growth, downsizing, and growing interdisciplinary studies.

PROFESSIONAL ASSOCIATION TRENDS
"What's in it for me?"

In order to keep up with increasing competition, associations need to promote the unique value of their programs, services, or activities. Associations also need to establish a brand to ensure their products and services are recognizable and create ways to personalize membership benefits.

- Associations are gathering and managing information in ways that will allow them to personalize the member experience. (Schweitzer 2003)
- Associations accomplish personalization by individualizing treatment of each member. This can be accomplished by remembering details for each member: their interests, the professional certification they have taken, or when and how they wish to be contacted. (Kasanoff 2002)

At the same time, however, associations need to take privacy issues into consideration.

- Privacy issues are creating an increasing number of problems for organizations, as well as for IS auditors and information security officials. (Jerskey 2003)
- Individuals will expect from their associations the same widespread access that the Internet affords them overall. Associations will increasingly be asked to operate transparently and will have to balance the expectations for open disclosure with the need to preserve confidentiality in some instances. (Cafaude 2002)
- Despite media reports about privacy issues, most people are still more upset over what organizations forget about them than what they remember. (It is annoying to have to repeat the same information again and again.) The new personalization solves this frustrating problem because it boils down to this: Organizations will remember what individuals like and don't like. When this is done properly, with discretion and respect for individual privacy, it makes life immensely easier for people. As a result, people will be fiercely loyal to whatever organization treats them this way. (Kasanoff 2002)

Associations should highlight the added-value of their products and services in order to stay competitive. Interest in, and demand for, the virtual association—"high-tech" and "high-touch" will continue to increase.

- With an emphasis on customer service, many associations have established customer service centers that can respond to all but specific content questions. (Association Trends Online, September 2002)
- Web-based association management software: keeping the database on the Web has a variety of significant advantages over the current technology of in-house software applications. Very few associations have their entire databases online yet but many are investigating the possibilities. Linking member and prospect records with Web software for simultaneous updating creates a powerful member and prospect database which can be easily manipulated for targeted marketing. (Association Trends Online 2002)

Implications
- It will be important for ACRL to market its brand and highlight its unique programs, services, and benefits.
- Data about how to personalize the association experience should be collected and used to benefit each member meaningfully, while at the same time respecting the member's privacy.

Marketing and communications
Technology continues to influence marketing and communications. Generational trends will also impact the way associations market to and communicate with their members.

- A predominant trend among associations is multi-dimensional communication vehicles. Members want not only to choose, by which vehicle they want to receive information, but they want to receive *different* information and products from *different* communication sources, e.g., mail, fax, e-mail. (Carey 2003)
- E-mail marketing of most products, programs, and services will become the norm as more and more members shop and choose to receive information electronically. (Carey 2003)
- Attendees lean towards technology as a means of receiving information about events or registering to attend. (Myint 2003)
- The current-day economics of managing associations requires new ways of communicating and marketing to generationally diverse audiences. Generational marketing involved identifying and understanding how the beliefs, attitudes, emotions, needs and interests of each generation influence their decisions and behavior. (Gunn 2002)

Implications
- ACRL will need to assess members' communication preferences and should investigate the costs of tailoring communications based on the member's preference.
- As e-mail communication becomes more and more prevalent, ACRL will need to be mindful of the frequency of electronic communications and may need to reinforce electronic communication with hard copy follow-up.

- ACRL should consider a customized marketing approach that reflects the personalities of member's different generations.

Member leaders
In order to keep pace with changing times, today's emphasis is on organizational flexibility and a nimble board of directors with a focus on governing, not on managing. Associations may need to examine their structure and make changes to accommodate a new generation of leaders.
- Responding to an ever-changing environment will require organizations to have a more fluid and flexible organizational structure. The structure associations use to accomplish their goals will evolve more frequently as associations regularly explore if they are best organized to do the work they need to be doing. (Cafaude 2002)
- Boards are revisiting the process by which they govern and examining new models of governance. In addition, there is a push toward more participatory governance, according to the National Center for Nonprofit Boards. (Association Trends Online 2002)
- The will to govern well involves focusing on three critical points: 1) building greater knowledge—ensuring that information about member needs, wants, and preferences; the capacity and strategic position of the organization; and relevant external factors are routinely considered in work and decision-making systems; 2) developing and sustaining a culture of trust; and 3) creating systems, structures, processes, and culture that support nimbleness. (Tecker 2002)
- In fall 2000, the Accreditation Board for Engineering and Technology (ABET), Baltimore, changed its process for strategy making. Until then, ABET's board spent most of its time on routine matters, and one meeting agenda looked very much like another. Why? Partly because our large, 42-member board met only twice a year. Our board members, educators, and practitioners at the leading edges of their disciplines were results-oriented with expertise in problem solving. However, we were not drawing on their breadth of knowledge; nor did we develop and enhance their leadership skills. We realized our board members needed to adopt an entirely new way of thinking, to concentrate on strategy making in a rapidly changing environment. To help them do that, we hired outside strategic counsel. Our reasoning: Outside counsel could provide continuity through changing presidential administrations, offer expertise on strategy making from several similar organizations, and provide an external, objective perspective of the process and issues identification. (Aberle 2003)
- The diversity of boards of directors should increase and be more reflective of member populations, especially in international constituencies and mentoring of younger leaders. (Carey 2003)
- The next generation of leaders and members will expect associations to use technology to enable them to participate in the organization's work without having to travel to a certain place at a certain time (Tecker 2002)
- An incoming trend is "communities of practice" where members can form their own electronic communities with volunteer moderators to exchange information and tackle problems. (Carey 2003)

Implications
- ACRL should continue to move forward with its new strategic plan and focus on outcomes, not process.

- ACRL should continue to examine whether its organizational structure and systems are flexible and facilitate maximum membership participation.
- ACRL should investigate how it can best utilize technology to conduct association business.

Generational trends

Expectations of current association members may not match younger members' expectations. As associations continue to develop products and services, they must be mindful of the increasing diversity of their membership and develop ways to serve their diverse constituents.

- As our profession continues to "gray," member volunteers may become more scarce. Members have less time available for involvement in the work of associations. Younger members have been noted to be less participatory, less loyal to membership organizations, and more technology-focused than the Baby Boomers. ("Forum" 2001)
- As the US population of the Baby Boomers moves toward retirement, many association executives are striving to prove their relevance to older members while still appealing to younger audiences. (Gunn 2002)
- In addition to cultural and ethnic diversity, there is generational diversity in today's workplace. Therefore, it will become increasingly difficult to convince members that their professional society understands their needs and concerns if no one in the organization looks like them, sounds like them, or is close to their age. The ability to convert student members to regular members, never an easy task, becomes harder as the student population becomes move diverse. (Levin 2003)
- Some overarching social trends don't bode well for member involvement in associations—Generation X and Y trend—resulting in the diminished influence of associations in general. (McGee 2002)

Implications

- ACRL should continue to examine whether its organizational structure and systems are flexible and facilitate maximum membership participation.
- It will be important for ACRL to continue recruit new members. The association should pay particular attention to recruiting efforts for library school students and highlighting the benefits of involvement in the association.
- ACRL will also want to emphasize its New Member Mentoring Program and underscore the benefits of volunteer service.
- ACRL should assess the generational difference in satisfaction of programs, services, and delivery methods; attitudes about travel for meetings; attitudes about governance of the association; loyalty to the association; willingness to volunteer.
- ACRL should investigate the development of "generation-based" business practices with particular emphasis on generational marketing and communications to really reach the Gen X and Y audience.

The post-9/11 association

Professional associations continue to deal with the repercussions of September 11. This includes creating association "crisis management plans," revisiting legal documents including hotel and

facility rental contracts, and developing of strategic plans with contingency plans that provide protection and flexibility for the association.

- Numerous associations learned a hard lesson on September 11, either having to cancel a meeting in progress and/or cancel, reschedule, or otherwise alter a future meeting. In the wake of September 11 many planners top priority was the development of a "crisis management plan." (Golding 2002)
- The terrorist attacks on September 11, 2001, sounded a wake-up call for the United States and will stand as a significant event in our lifetime. For many of us, it marks the date we began questioning our safety and security as a free and democratic society. For association executives, it is also the date that industry-wide and internal business continuity took center stage. Gone is the day when organizations saw natural disasters, burglary, disgruntled employees, or a down computer system as the biggest threat in their contingency planning. In the post–September 11 world, terrorist attacks, biological epidemics, and concerns that an entire city might become inaccessible are the new mantras for planning. Add war and severe acute respiratory syndrome (SARS)—which have both taken their toll on international travel and association meeting attendance—and it's clear why, for many industries and organizations, business continuity planning continues to evolve. (Morgan 2003)
- Meetings provide major infusions of revenue to the organization. They also serve as venues for irreplaceable events, such as educational sessions, business meetings, elections, and awards ceremonies. If your meeting is crippled or canceled, the organization may face unrecoverable losses. Certainly, arranging for event-cancellation insurance is an important—some consider it essential—step. Such insurance can cover or mitigate your financial losses if your meeting is unexpectedly canceled or rescheduled. While disasters are not always preventable, their damage can be limited by a solid crisis plan. Conversely, having no crisis plan only increases unnecessary complications. At risk is your organization's ability to meet its announced obligations. Not having resources ready can make damage worse. Your association's good name becomes vulnerable when you make difficult policy decisions under the pressure of crisis. In addition, lack of preparation can devastate personal credibility. (Malouff 2003)
- In response to September 11, association meeting planners took a closer look at their contracts. More than 600 association meeting planners were asked if they revised their contracts after September 11. Out of those queried: 26% changed their contracts after September 11 with 37% adding or redefining their force majeure clause; 26% updating their cancellation clause; 16% updating their attrition clause; and another 18% making "other" changes. The changes planners made to contacts indicate a desire to include some measure of liability protection. (Braley 2002)
- In the past, a simple force majeure clause would have covered most major catastrophic events that could threaten a program, regardless of the cause. In the wake of 9-11, many suppliers, while flexible in the weeks following the attacks, started to interpret force majeure strictly as "acts of God," such as earthquakes and tornadoes, and excluding disruptive actions caused by man. Many issues falling into the latter category are key concerns of planners today: war, geopolitical turmoil, hostilities between nations, and labor problems. (Grimaldi 2003)

- Ever since 9/11, the importance of looking at different futures for our organizations has become a #1 priority . . . There are a variety of methods and partners to help associations working through the difficult exercise of integrating thoughts about future events and their effects on operations. All organizations should make this activity a vital, integrated part of scanning and strategic planning exercises. The key here is not only to integrate responses to future events in our strategic and operational planning, but also consider them when budgeting. (Carey 2003)

Implications
- Contracts with vendors, hotels, and convention centers should be reviewed and may need to be revised. Special attention should be given to cancellation and force majeure clauses.
- ACRL developed an association-wide "Crisis Management Plan" that should be continually revised for association events.
- ACRL should not only consider the "what if" questions when planning future events and strategic plans but also should consider the possible implications when preparing budgets. ACRL should also educate leaders in what this type of planning involves and train them to consider scenario planning.

Meetings and continuing education
Meetings and conventions are big business for professional associations.
- 15.9 million individuals attended an association meeting during 2001, a 2% increase from 1999. (Braley 2002)
- According to *Convene* Journal's 2002 Meetings Market Survey, associations rely on conferences to provide, on average, 33.2 percent of their income. Moreover, this percentage has remained virtually unchanged since Convene first conducted the survey in 1992. (Dakake 2002)

Immediately after September 11, association planners feared that meeting attendance would dramatically decrease. For the most part, however, meeting registration statistics have remained the same or slightly increased and the total number of meetings increased. .
- The number of association meetings was up 2% in 2002. (M&C Meetings Market Report 2002)

In light of the ongoing uncertainties related to travel, budget cuts, and the sluggish economy, however, associations should plan conservatively in terms of predicting meeting attendance

Continuous changes in the economy and job markets will require on-going education for professional adults. Associations continue to be the primary providers of continuous learning.
- The percentage of members rating ACRL professional development programs as "very important" to them: 64.6%. (ACRL 2000)

Online learning activities continue to be developed by associations with varying levels of success.
- The public's interest in online learning continues to grow. The number of associations getting into e-Learning continues to expand. Associations may

experience some ups-and-downs with an e-learning launch and there may be a period of several years before online courses are profitable. (e-Lern 2002)
- Association education planners maintain a presence with e-learning, even if it is not currently profitable, because they believe it is the "wave of the future." (ASAE 2002)

As more people warm up to the idea of delivering education online, debates have emerged about what this shift means for face-to-face events. An emerging trend is "blended learning" – which combines elements of online and in person instruction.
- "Trends in E-Learning," a November 2002 article published by the American Society for Training and Development, identifies blended learning as one of the 10 trends that will materialize in knowledge delivery in 2003. (Rooney 2003)
- One of the benefits of blended learning that proponents cite is convenience – less travel for members and staff and fewer on-site details to manage. But some argue that in addition to the benefits of convenience and cost, blended learning actually provides a richer educational experience. A two-year study by Thomson Learning found that a structured curriculum of blended learning will dramatically increase employee productivity compared to single-delivery options. (Rooney 2003)

Implications
- ACRL will continue to be a main provider of professional development to academic and research librarians.
- The number of individuals attending ACRL professional development events will most likely remain flat or decrease.
- ACRL should budget conservatively for future professional development events including the National Conference, preconferences, and workshops.
- ACRL will need to heavily promote their professional development programs and highlight benefits so individuals with limited professional development budgets spend their dollars with ACRL.
- It may be a few years before ACRL's *e-learning* courses realize a profit.
- The association should research and investigate possible new programs and methods of delivery, including "blended learning" programs.

Advertising
One of ACRL's major revenue streams has been product and classified advertising. During the 1990s, advertising revenues were incredibly healthy, however, sales started declining in 2001 and continued throughout 2002.
- The recession may be over, but the recovery for the economy and advertising stands on very unsteady lets. (Cardona 2002)
- "While we're seeing modest signs of economic recovery, corporate profits and ad spending are not yet participating," says Rich Anion, chief financial officer of Dow Jones & Co. Ad revenue is running below initial expectations, which should leave 2002 revenue down in the mid-single digit range, he said. (Cardona 2002)
- Longtime forecaster Robert Coen at Universal McCann didn't spread any more sunshine last week when he revised down his 2003 ad spending forecasts, although he did predict growth to quicken in 2004. (Moses 2003)

Implications
- While there are some indications that advertising will rebound in 2004, growth is not predicted to return to the healthy levels of the late 1990s. Future revenues should be budgeted with an expectation of slow growth.
- Another factor that could greatly affect ACRL's classified advertising revenue is the possible move of ALA as a whole offering one-stop-shopping for this type of advertising. This would allow advertisers to place online ads through a single location within ALA, rather than paying ACRL individually to advertise in *C&RL News*. If ALA moves to this model *C&RL News* revenues will be impacted.

Trends in giving
Revenues generated from fundraising and donations were down in 2001 and 2002. Although surveys indicate fundraisers remain optimistic about the future, it will be important for associations to review fundraising initiatives, rethink relationships and sources of revenue, and possibly reduce budget expectations.
- Many in the nonprofit sector started to notice in the spring of 2001 a slowdown in revenue generated from fundraising activities. Individual giving, corporate sponsorships, and foundation grants all started to slow. A continued sluggish economy, fallout from dot-com failures, and the events of September 11th have taken an additional toll. (Zaniello 2003)
- While a recent survey by the Association of Fundraising Professionals reports that 60% of charities raised more money in 2001 than in 2000, 40% raised the same amount of less. In addition, nonprofit organizations supporting the arts, humanities, or environment have been particularly hard hit. (Zaniello 2003)
- Even though the sluggish economy made their jobs challenging in 2002, fundraisers view 2003 optimistically. Forty-five percent of U.S. respondents predict increases in fundraising this year, and an additional 38 percent expect to maintain 2002 levels, according to a study by the Association of Fundraising Professionals, Alexandria, Virginia. In other findings, the "AFP State of Fundraising 2002" reported that nearly 49 percent of U.S. respondents and 63 percent of Canadian respondents raised more money in 2002 than in 2001 despite increased competition for dollars, government budget cuts, and decreased corporate support. (*Association Management* July 2003)

Implications
- ACRL should be conservative when budgeting for the amount of colleague donation dollars.
- ACRL will need to be persistent in regards to fundraising and potential donors may need to be approached repeatedly before a donation is secured.

ACRL's Relationship with ALA/Collaboration
As ACRL looks forward, collaboration will be key. The association will need to identify ways in which resources can be pooled around common goals.
- Associations are identifying groups that share similar missions to collaborate with on important issues as well as to broker products and services.
- Association executives need to strategically focus their collective energies on initiatives that provide a win-win situation. (Association Management, September 2002)

Implications
- ACRL should find creative ways to work with other ALA divisions and units, such as:
  - partnering with other ALA divisions and units for joint vendor contracts in order to increase the association's bargaining power;
  - identifying ways in which ACRL can team up with other ALA units for combined promotional efforts and campaigns; and
  - investigating professional development collaborative projects.

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