



The State of

ACADEMIC LIBRARIES

BENCHMARK SURVEY

• 2020 •



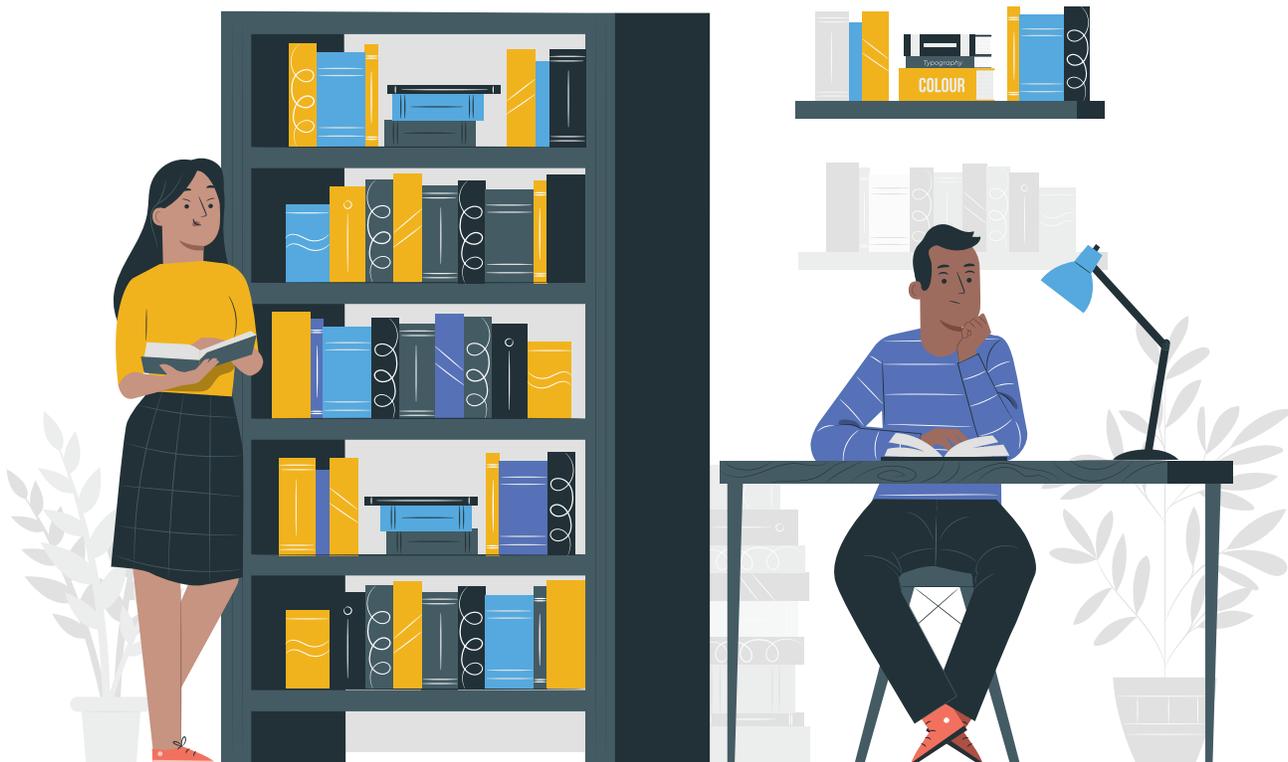
Introduction

The 2020 State of Academic Libraries Benchmark Survey, is a comprehensive survey of North American academic libraries, administered by Library Journal and commissioned by Ex Libris. Executed during June 2020 it is the second annual survey of its kind, allowing the authors to identify trends.

The 233 responses represent a diverse set of institutions, including small and large, public and private, 2 and 4-year colleges, and the full academic spectrum from those granting Associates Degrees to Doctoral granting colleges.

This study was commissioned to:

- Identify the key missions of academic libraries
- Examine the self-identified challenges facing academic libraries
- Evaluate the library's role as related the broader institution
- Determine the issues that libraries will face in the future



Findings at a Glance



Students retention is the top priority at 92%



91% indicate supporting affordable learning remains a priority



84% of libraries say supporting remote students is forcing them to make changes



Many libraries, 46%, expect to improve instructional technology with increased spending



Most schools, 94%, rely on the library to provide course materials



60% saw an increase in demand for electronic and digital resource sharing during the pandemic



The number of people with a negative budget outlook is 56 percentage points worse than in the 2019



Nearly half the libraries, 47%, want to better support research at their institutions



The Library Mission

When asked how important a number of issues were to their institution's mission, respondents confirmed that 11 of the 13 offered were net high (High or Medium) and only 2 were net low (Low or Not important). The table below presents them in descending order of importance as calculated by the 'High' rating.

Topping the list of institutional priorities, and one that deeply influences the library priorities, Student Retention scored 99% for net high

(medium or high) a significant rise from 2019 when it was 8th out of 10 priorities.

Since the survey was performed during the pandemic, which affected the broader college beyond the walls of the library, it is not surprising to find certain items as high priorities: Teach Students Research and Information Skills, Support Institutional Mission, Student Engagement, Support Distance Teaching and Learning, Provide Course Materials and Support Faculty, Affordable Learning and finally Support Research.

The Pandemic Impact on the Library Mission

99% felt that student engagement and retention are top priorities, correlating with the 91% that feel that affordable learning is also key.

Student Retention tops the list of priorities driving the mission					
	High	Medium	Low	Not important	Don't Know/NA
Student Retention	91.5%	7.1%	1.4%	0.0%	0.0%
Teach Students Research and Information Skills	85.4%	12.7%	1.9%	0.0%	0.0%
Support Institutional Mission	82.6%	16.9%	0.0%	0.0%	0.0%
Student Engagement	79.8%	19.2%	0.9%	0.0%	0.0%
Support Distance Teaching and Learning	69.0%	24.8%	5.2%	0.0%	1.0%
Provide Course Materials and Support Faculty	65.1%	28.8%	5.7%	0.0%	0.5%
Affordable Learning	60.6%	30.5%	7.5%	0.0%	1.4%
Support Research	60.1%	28.6%	7.0%	2.3%	1.9%
Provide Individual and Collaborative Workspaces	51.6%	32.9%	11.3%	1.9%	2.3%
Collection Development and Preservation	36.6%	53.1%	8.5%	0.9%	1.0%
Support the Role of the Institution in the Community	35.8%	41.5%	17.9%	0.0%	3.7%
Converting Print to Digital/ Scanning	15.6%	41.5%	28.3%	10.4%	4.3%
Preservation of Rare Materials	15.6%	31.3%	33.2%	14.2%	5.7%

Some traditional library responsibilities such as Teaching Students Research and Information Skills continue to rank highly at 98% net high. Others, like Scanning Print Materials (57% net high), are lower, yet still an important element in the rapid shift to a digital world.

There is limited guidance on how to reopen, which impacts many priorities. There are federal, regional, state, county and even municipal guidelines. Beyond that, each institution has flexibility in interpretations, and finally a given institution might treat individual campuses differently. Throughout this turmoil, the American Libraries Association has tried to

collect the best information from multiple sources in their [ALA COVID-19 Recovery](#) website.

The pandemic has also thrown a new light on the definition of 'distance learning'. As explained in the ACRL's [Standards for Distance Learning Library Services](#) the rise of the Internet blurred the distinction because a student in their dorm room would see little to no difference in their user experience to one off campus. However, with many international students having to take classes remotely, the library still has an obligation to provide service according to what ACRL refers to as [The Access Entitlement Principle](#):

“All students, faculty members, administrators, staff members, or any other members of an institution of higher education are entitled to the library services and resources of that institution, including direct communication with the appropriate library personnel, regardless of where they are physically located in relation to the campus; where they attend class in relation to the institution’s main campus; or the modality by which they take courses.”

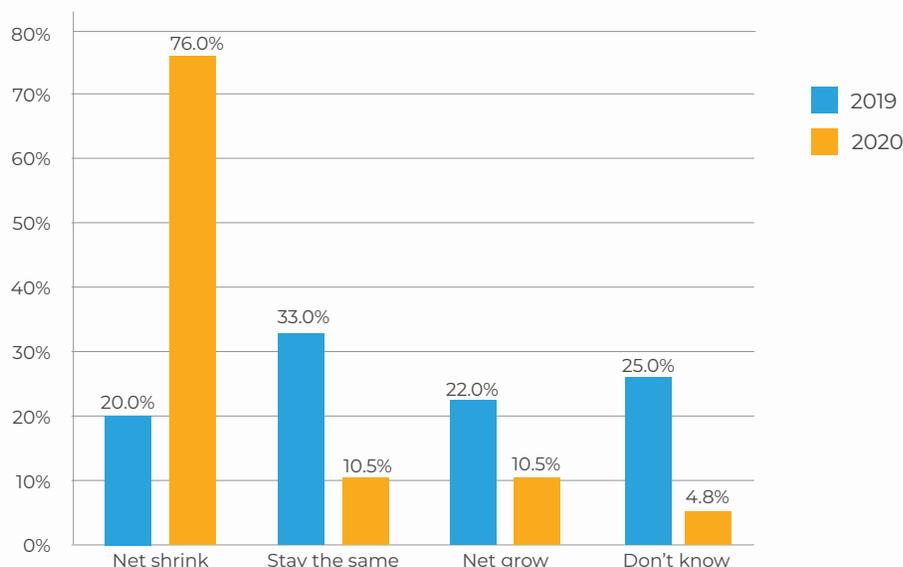
Source: ACRL: The Access Entitlement Principle

As a result of the pandemic libraries are now shifting to respond to a future that before was several years away and now is being thrust upon them. As stated by Jurgen Schulte, et al., in College and Research Libraries' [Shaping the Future of Academic Libraries: Authentic Learning for the Next Generation](#), “by shifting the role of the academic librarian away from the physical library and engaging with staff and students... [the modern academic library] has become a much more valuable and effective contributor to improving the student experience, playing a key role in curriculum.”

Budget and Resource Allocation

In 2019 only 28% of institutions predicted a negative budget trend. But the survey was performed in June 2020, three months into the pandemic and unsurprisingly 76% anticipated negative budget pressures over the next five years. An optimistic minority, 11%, expected rising budgets.

Budget trend expectations over the next 5 years show a leap in pessimism



When asked how they expected budgets to change next year, there were four growth areas. Adapting to an increased demand for online teaching and learning, the greatest budget increases were in improved instructional technology (46%) and the acquisition of additional digital resources (36%). Respondents also recognized the challenge of maintaining software on institutional servers, with 18% saying more would go to migrating to cloud-based services.

Significant budget changes expected over the next year

	Net reduction	Same	Net increase	Don't know
Improved instructional technology	8.2%	25.9%	46.1%	19.8%
Acquiring digital resources	45.5%	16.3%	36.1%	2.1%
Migrating to cloud	5.6%	43.3%	17.7%	33.3%
Improved resource sharing	6.9%	51.9%	13.4%	27.7%
Scholarly profiles	5.2%	47.4%	7.3%	40.1%
Acquiring physical resources	86.6%	9.1%	1.7%	2.6%
Staffing	50.9%	41.4%	1.7%	6.0%

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



In 2019, only 37% of all institutions said spending on physical resources would shrink.

In 2020, it more than doubled to 87%.

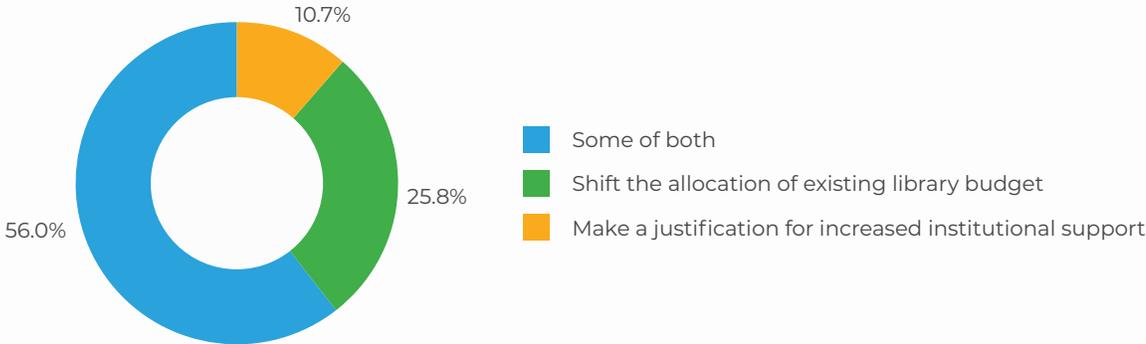
Source: Ex Libris State of Academic Libraries 2020 Benchmark Survey

Related to the expedited transition to virtual collections, libraries are finding it beneficial to continue to invest in resource sharing, with 65% expecting to remain stable or grow. This number reflects major steps taken over time by libraries to organize themselves into groups. In a recent report from Ithaka S+R, entitled [Restructuring Library Collaboration](#), Roger Schonfeld explained the roots of collaborative networks. “From the beginning of the 20th Century, library leaders began establishing interlibrary lending networks.” These networks operated under constraints of a pre-digital age, due mainly to the “logistics associated with sharing print collections, and travel and transportation generally.”

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

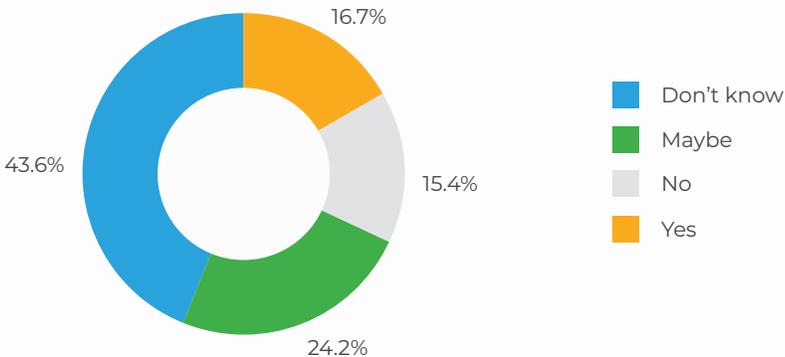
There is confidence that requests for budget increases will be granted. When asked how the increases listed above would be funded, the majority (56%) reported a combination of request for budget increases and a reallocation of existing budget.

Funding for new initiatives will primarily come from a combination of new funds and budget reallocation



There is significant uncertainty as to whether the library will be eligible for support from the \$14 billion [CARES Act](#) for Higher Education Emergency Relief Fund, although the amount each college is eligible for has been declared.

44% don't know whether the library will benefit from the CARES Act





Big vs. Small Challenges

With a few notable exceptions, the challenges facing smaller institutions are in line with the larger ones, as measured by full-time enrolled students.

Smaller institutions are more likely to consider the following challenges as significant: Supporting remote students, Lack of physical space, Communicating with faculty and Inadequate IT systems.

Conversely smaller institutions are less likely to consider the following challenges as significant: Funding cuts, Acquisition budget limitations, Staff shortages, Losing space to other departments, Resource discovery, multiple format discovery. Consortial politics and inter-library collaboration is easier were also less of a problem.

Institutional challenges by FTE

	All Institutions	< 5,000	5K – 19K	20K +
Funding cuts	76.1%	70.0%	76.9%	86.4%
Acquisitions budget limitation	69.5%	66.7%	66.7%	79.5%
Staff shortages	61.5%	61.1%	56.4%	70.5%
Supporting remote students	45.5%	50.0%	42.3%	43.2%
Other departments want to use library space for specific purposes	39.9%	34.4%	42.3%	47.7%
Lack of physical space	37.6%	44.4%	37.2%	22.7%
Poor communication with faculty	33.8%	36.7%	38.5%	20.5%
Inadequate insight to resource usage	26.8%	25.6%	30.8%	22.7%
Inadequate IT systems	25.8%	31.1%	24.4%	18.2%
Discovery of resources	24.4%	22.2%	21.8%	34.1%
Challenges with discovering multiple resource formats	16.4%	13.3%	15.4%	22.7%
Consortial politics	10.8%	5.6%	10.3%	22.7%
Issues with collaborating with other libraries	7.0%	3.3%	6.4%	15.9%
Other	7.5%	4.4%	9.0%	11.4%

Pandemic-Related Challenges

Academic libraries faced numerous challenges during the so-called disruptive period, beginning with an emergency transition to remote teaching and learning through to gradual reopening plans. Asked which tasks became harder, respondents ranked providing access to physical resources (97%), fulfilling course resource lists (78%), faculty communications (64%), providing access to physical resources (58%). Closely related, digitizing additional printed materials (55%) and identifying alternatives to physical resources (52%), further reflect the needs of remote students.

Providing access to physical resources tops the list for tasks that became harder during the sudden shut down of the physical campus

	Net harder	No change	Net easier	N/A or Don't know
Providing Access to Physical Resources	96.7%	1.4%	0.0%	1.9%
Fulfilling Course Resource Lists	78.3%	8.5%	0.9%	12.3%
Communication with Faculty/Administration	63.5%	26.5%	7.6%	2.4%
Providing Access to Physical Resources	57.5%	28.3%	3.8%	10.3%
Communication with Students	55.9%	18.0%	2.8%	23.2%
Digitizing Additional Printed Materials	55.0%	17.1%	4.7%	23.2%
Identifying Alternatives to Physical Resources	52.6%	21.8%	6.2%	2.8%
Supporting Research or Researchers	51.7%	36.0%	10.9%	1.4%
Providing Access to E-Resources	16.0%	57.5%	25.9%	0.5%

In [Digitization in an Emergency: Fair Use/Fair Dealing and How Libraries Are Adapting to the Pandemic](#) Ryan Clough explains the dilemma facing nearly every academic institution as they closed physical access yet tried to negotiate a fair use compromise.

Asked to rank which tasks, if any, were easier during the pandemic, about one in five ranked providing access to e-resources and identifying alternatives to physical resources as becoming easier. One in 10 also reported that it became easier to support researchers.

Providing access to e-resources tops the list for tasks that became easier during the pandemic

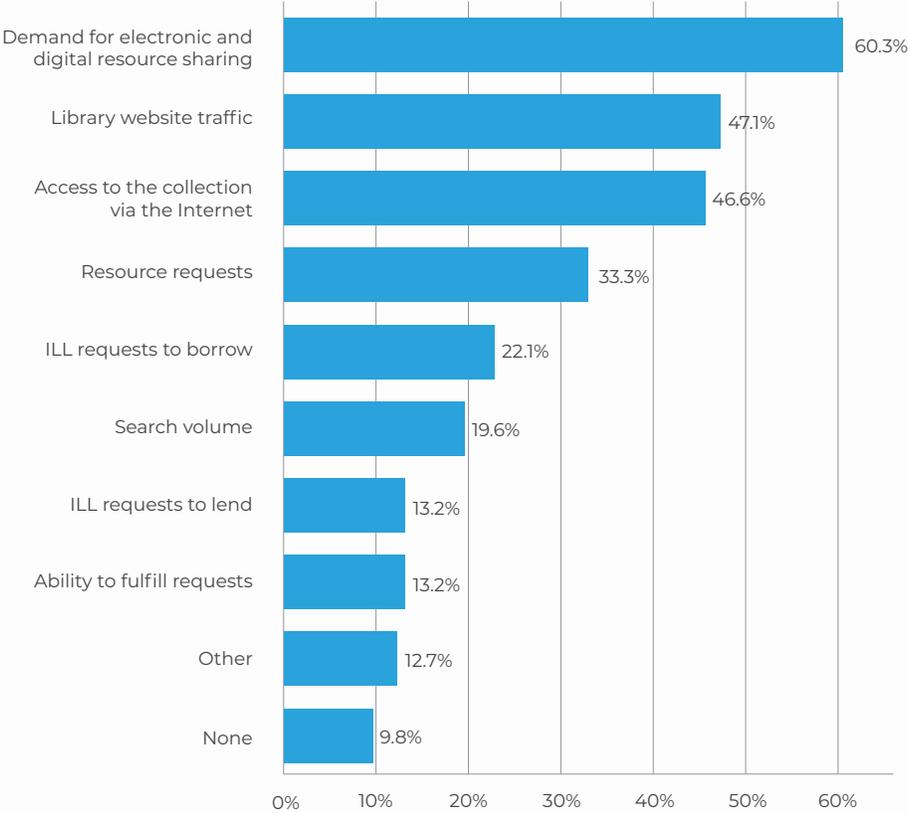
	Net harder	No change	Net easier	N/A or Don't know
Providing Access to E-Resources	16.0%	57.5%	25.9%	0.5%
Supporting Research or Researchers	51.7%	36.0%	10.9%	1.4%
Communication with Faculty/Administration	63.5%	26.5%	7.6%	2.4%
Identifying Alternatives to Physical Resources	52.6%	21.8%	6.2%	2.8%
Digitizing Additional Printed Materials	55.0%	17.1%	4.7%	23.2%
Providing Access to Physical Resources	57.5%	28.3%	3.8%	10.3%
Communication with Students	55.9%	18.0%	2.8%	23.2%
Fulfilling Course Resource Lists	78.3%	8.5%	0.9%	12.3%
Providing Access to Physical Resources	96.7%	1.4%	0.0%	1.9%

While most tasks became tougher during the pandemic, it is interesting to note the difference in opinion for two items: Providing Access to E-Resources, Identifying Alternatives to Physical Resources and Supporting Research or Researchers. It suggests that some institutions were better prepared than others when needing to switch to a virtual environment.

Schools Met the Pandemic Challenges

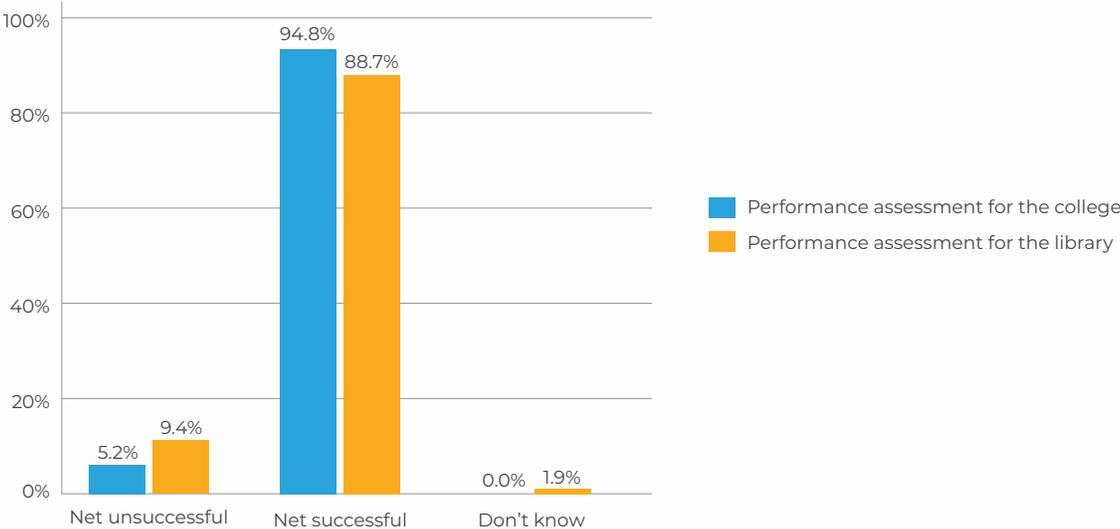
During the pandemic, institutions noticed an increase in certain services, with resource sharing, web traffic, searches and ILL requests topping the list. 10% noted that nothing increased during the period.

Some services saw an increase in activity during the pandemic



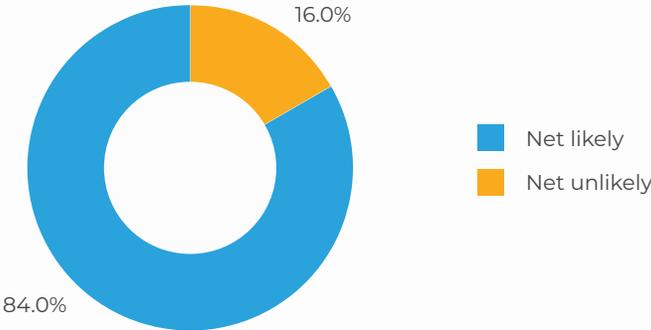
The vast majority of respondents believe that at both an institutional and library level, they weathered the pandemic well by continuing to provide services. This overwhelmingly positive self-assessment will eventually be placed into context when the fall's enrollment figures become clear.

Self-assessment presents a positive view of performance during the pandemic



Lessons were learned however, 84% declared changes would be instituted as a consequence of experiences gained during the pandemic.

Lessons learned from the pandemic will translate to action





Affordable Learning

There remains significant confusion around learning initiatives. While it is reportedly a high priority for colleges (91% net high), details are unclear to one in four respondents (27%).

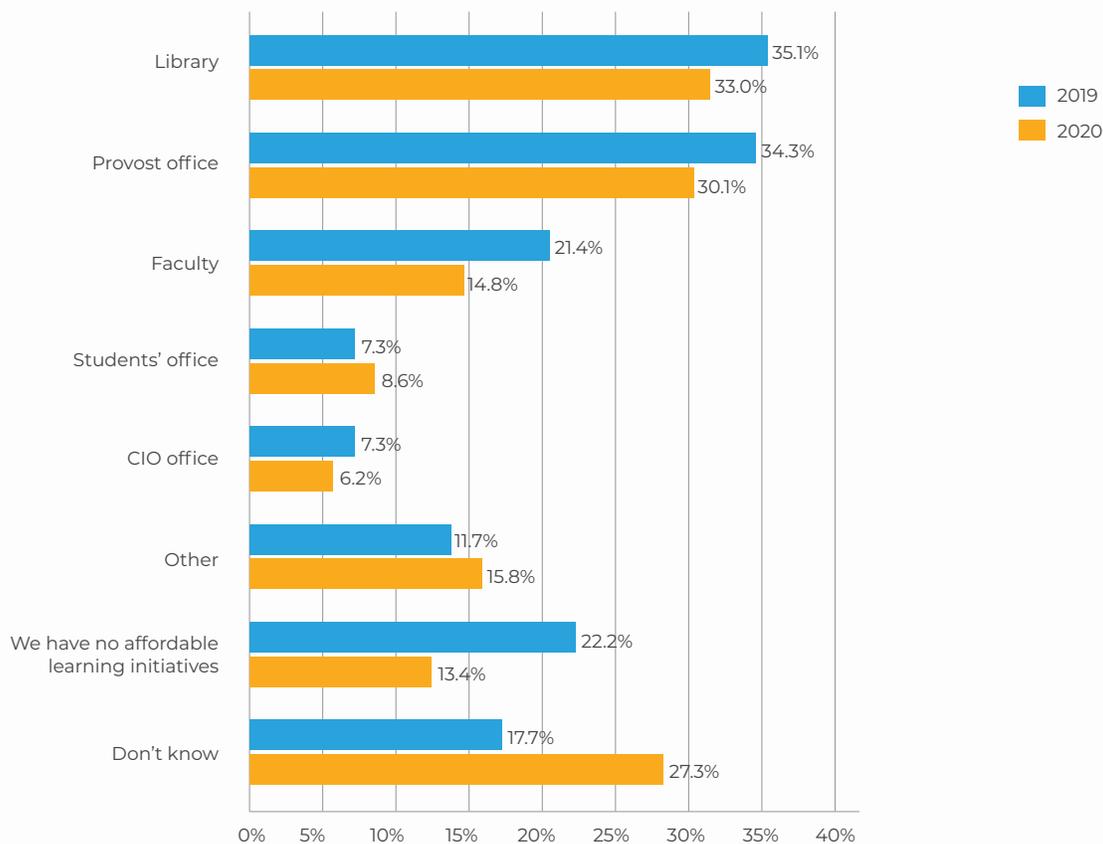
Largely unchanged from 2019, respondents confidently remarked that both the library and the provost's office were primarily leading affordable learning initiatives, with libraries have the slight lead.

41% either did not know or reported that there were no affordable learning initiatives, up from 29% in 2019. Roughly a quarter (27%) said it was the provost's office, and about the same (24%) said it was the library itself, compared to 34% and 35% respectively in 2019.



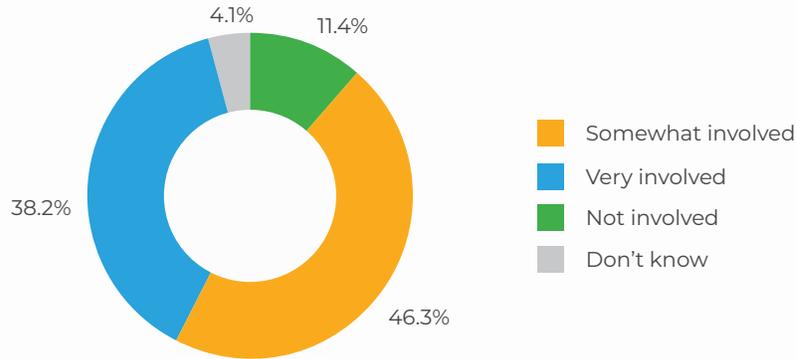
One in three academic libraries are leading their institutions' affordable learning initiatives

Libraries and the provost's office continue to lead while faculty give up ground on driving affordable learning initiatives



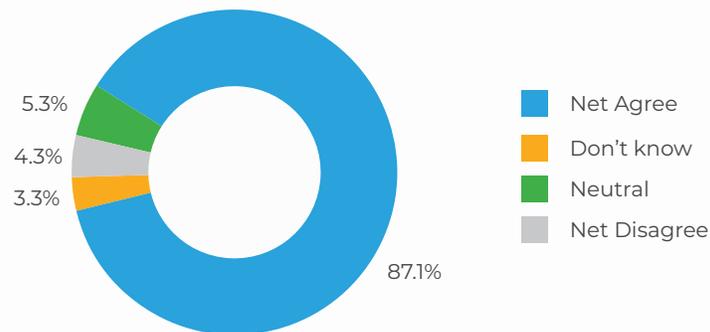
Despite the uncertainty in leadership, libraries reported that they were engaged with any existing initiatives, with 85% saying they were either somewhat or heavily involved.

Where there is an institutional focus on learning affordability, then the majority of libraries are involved



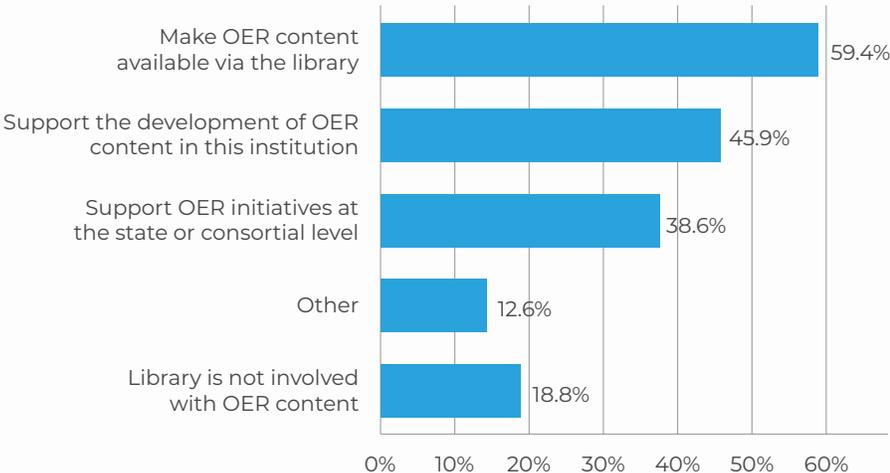
Respondents almost unanimously (87%) believed that events associated with the pandemic period made learning affordability even more important.

Post-pandemic, affordable learning is more important than ever



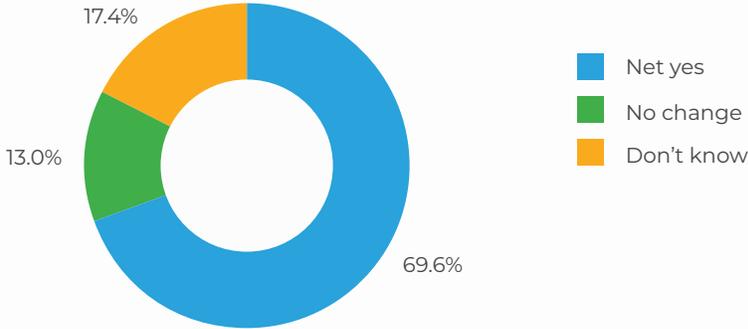
One way in which libraries are supporting affordable learning is by embracing Open Educational Resources (OER). The most common method (59%) is to make the content available and discoverable via the library like any other resource. But libraries are also supporting the development of content at the local, state and/or consortial level. About one in five (19%) libraries are not involved with OER in any way.

Libraries are making OER content available and discoverable the same way as any other resource



Related to affordable learning is the degree of support offered by the library for course materials and the indications are things are going to change. The survey asked whether they expect the library's approach to supporting course materials will change due to new needs related to COVID-19. In a five-to-one split, 70% said there would be changes.

The way course materials will be handled will change because of the pandemic





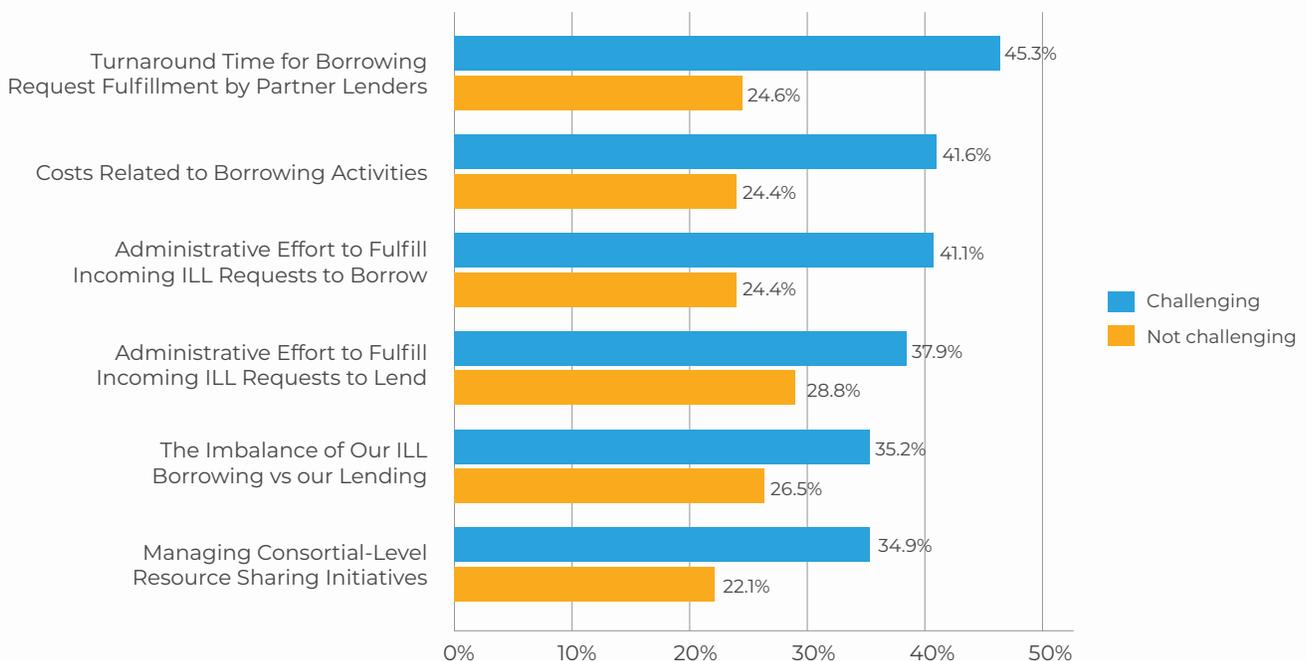
Resource Sharing and Inter-Library Loans

Lockdowns and remote teaching and learning hurt resource sharing fulfilment, but not everyone was affected equally. To gauge the varying impact on keys tasks associated with resource sharing, respondents were asked to rate six elements.

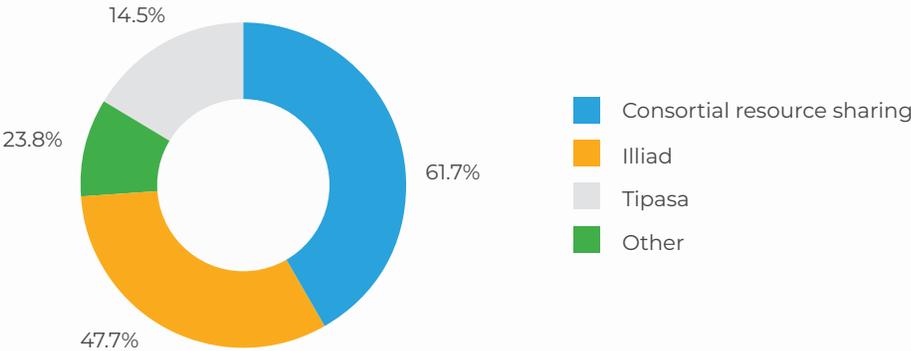
The greatest challenge was turn-around time (45.3%), with borrowing costs (42%) and sheer staff effort (41%) close behind.

Resource Sharing and Interlibrary Loans

	Challenging	Not challenging	Don't know
Turnaround Time for Borrowing Request Fulfillment by Partner Lenders	45.3%	24.6%	30.2%
Costs Related to Borrowing Activities	41.6%	24.4%	34.0%
Administrative Effort to Fulfill Incoming ILL Requests to Borrow	41.1%	24.4%	34.5%
Administrative Effort to Fulfill Incoming ILL Requests to Lend	37.9%	28.8%	33.3%
The Imbalance of Our ILL Borrowing vs our Lending	35.2%	26.5%	38.3%
Managing Consortial-Level Resource Sharing Initiatives	34.9%	22.1%	43.1%



In order to understand the predominant vehicles for interlibrary lending, respondents were asked to select their primary tools. Consortial resource sharing was by far the most common method across all institutions (62%). Illiad had a more significant share (48%) than Tipasa (15%). But there were also other methods which were relied upon 24%.



Supporting Research

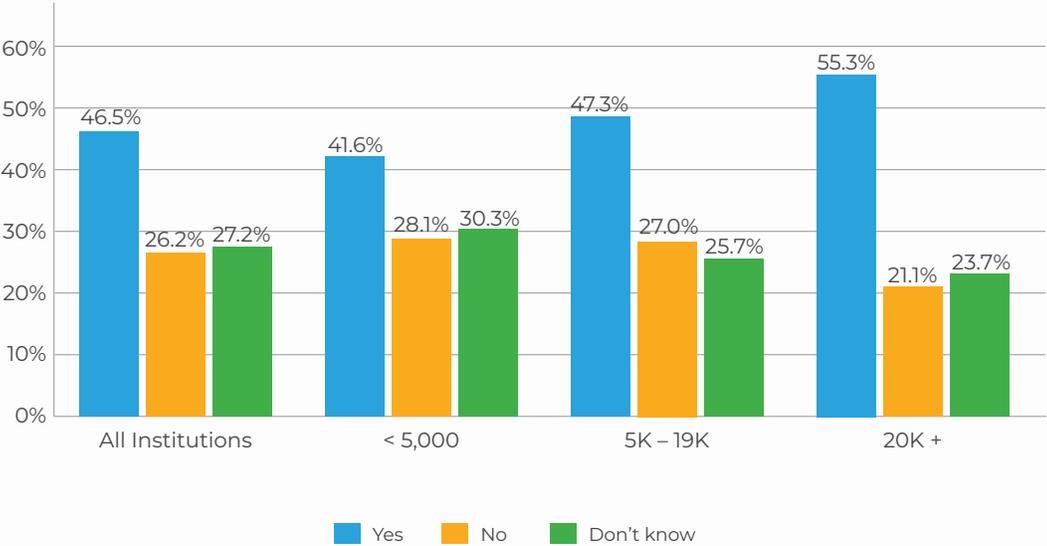
Respondents were asked in which ways their library supported faculty research. Three areas were prominent: Providing access to scholarly resources (85%), Depositing to an institutional repository (39%) and Finding relevant journals for publication (35%). One in five were also supporting by providing metadata support (22%) and helping create and maintain faculty profiles (21%).

Only a few helped to monitor the impact of faculty research (9%), although this varies by size of enrollment, with 3% in the smallest to 21% for the largest. Library involvement in submitting research for publication also varied, from 10% for mid-sized colleges up to 26% for the largest.

	All Institutions	< 5,000	5K – 19K	> 20K
Provide access to scholarly sources	85.1%	78.9%	86.1%	97.4%
Deposit publications or datasets to an institutional research repository	39.1%	22.2%	48.6%	59.0%
Find relevant journals for publication	34.7%	18.9%	38.9%	61.5%
Provide metadata support	22.3%	8.9%	22.2%	53.8%
Ensure compliance with Open Access policies	21.3%	7.8%	27.8%	38.5%
Support faculty profiles	20.8%	8.9%	27.8%	35.9%
Prepare data management plans	16.3%	3.3%	12.5%	51.3%
Manage article processing charges	11.9%	5.6%	13.9%	23.1%
Monitor the impact of faculty research	9.4%	3.3%	11.1%	20.5%
Monitor the impact of research conducted in the library	8.9%	3.3%	12.5%	15.4%
Submit research for publication	8.4%	0.0%	9.7%	25.6%
Other	6.9%	5.6%	6.9%	10.3%
None of the above	10.4%	16.7%	8.3%	0.0%

Asked about supporting research, for example by managing research output and data, improving research discoverability, managing faculty profiles, etc., half (47%) said they wished their library could play a stronger role, and a quarter (27%) were unsure.

Most academic libraries would like to better support research, peaking at over 55% for the largest institutions



Conclusion

Academic libraries across North America have risen to the unique challenges offered in 2020, with 89% saying they consider their library to have been successful.

Despite concerns around enrollment affecting budgets, 52% are maintaining or increasing their investment in the acquisition of non-physical content. That is a budget reallocation from the 87% who are actively reducing their spend on physical items, and a massive shift from the 37% who said they would reduce in 2019.

At an infrastructure level, 61% are maintaining or increasing their investment in cloud-based solutions in order to satisfy the increased demand for reliable and scalable online services and staff who must work remotely.

This sudden and significant shift to virtual content will further the need for cloud-based intelligent library systems that can manage and search both physical as well as digital and electronic content, such as Ex Libris Alma and Primo.

Prioritizing learning affordability, 92% said it was more important now than ever, libraries are embracing OER strategies and continue to proactively maximize the utilization of library assets in the classroom by collaborating with faculty through library-linked reading list solutions such as Ex Libris Leganto.

Turnaround times for resource sharing continue to pose a challenge for half the institutions, which explains the surge in adoption of solutions such as Ex Libris RapidILL during the summer of 2020, with clusters of institutions, acting as both lenders and borrowers, offering mutual turnaround times within 24 hours.

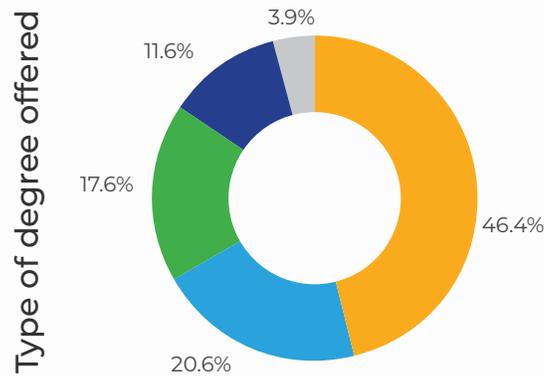
Academic libraries continue to establish new priorities and procedures that reflect a set of patron needs and business challenges that evolved almost overnight during March 2020. Some are brand new initiatives, while others are existing plans that jumped in urgency from nice-to-have to must-have. Some are temporary initiatives while others will have a long-lasting impact on how academic libraries will deliver services well into the future.

Methodology and Demographics

This survey was designed to reflect the current state of affairs in the US Higher Education library institutions. Respondents were chosen to reflect institutions of all sizes and types. A total of 233 respondents completed their surveys. The analysis presented in this document excludes incomplete surveys and blank answers on completed surveys where applicable. Programming, hosting and tabulation were all handled by Library Journal.

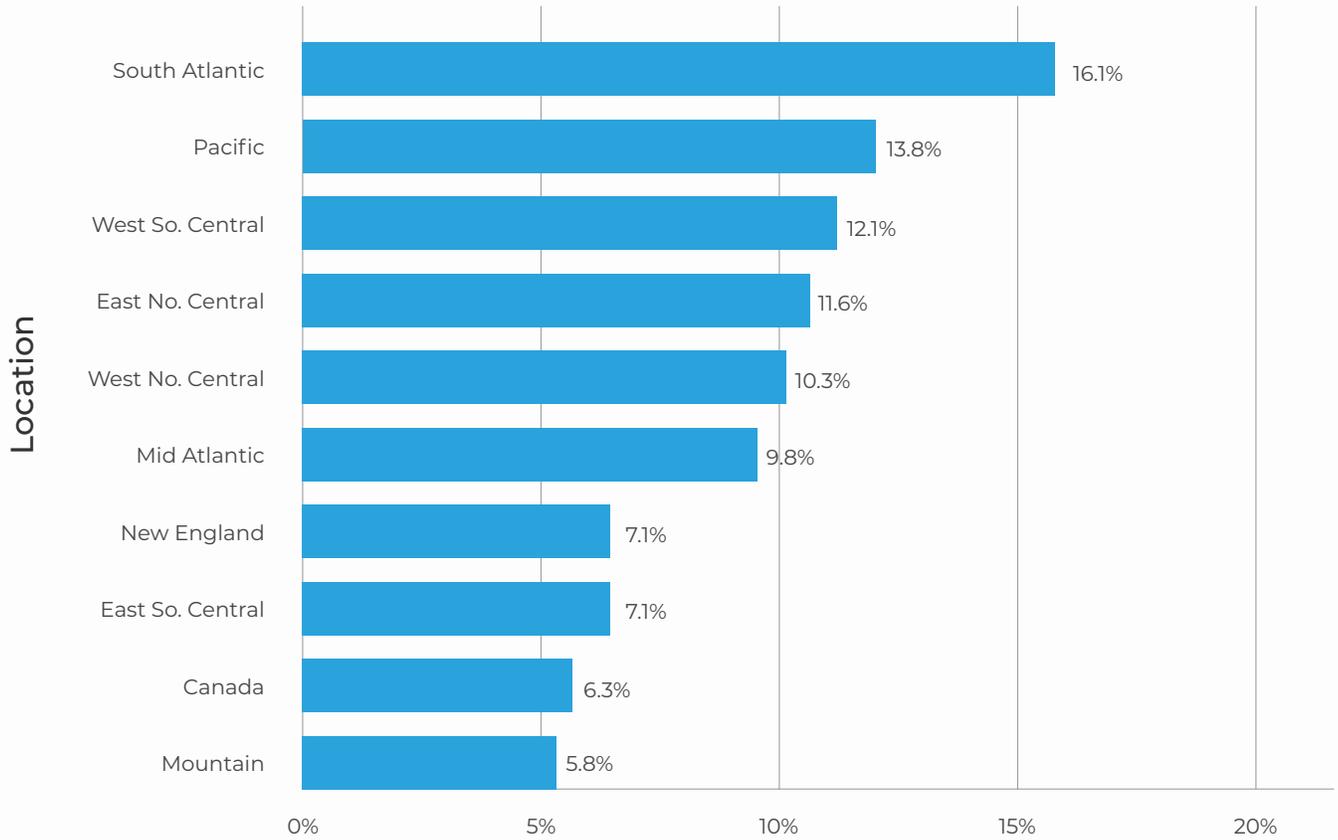
Of the 233 respondents to the 2020 State of Academic Libraries Benchmark Survey, there was good representation from across the academic spectrum, with Doctorate-granting universities being the largest group (46%).

The survey covered the entire academic spectrum

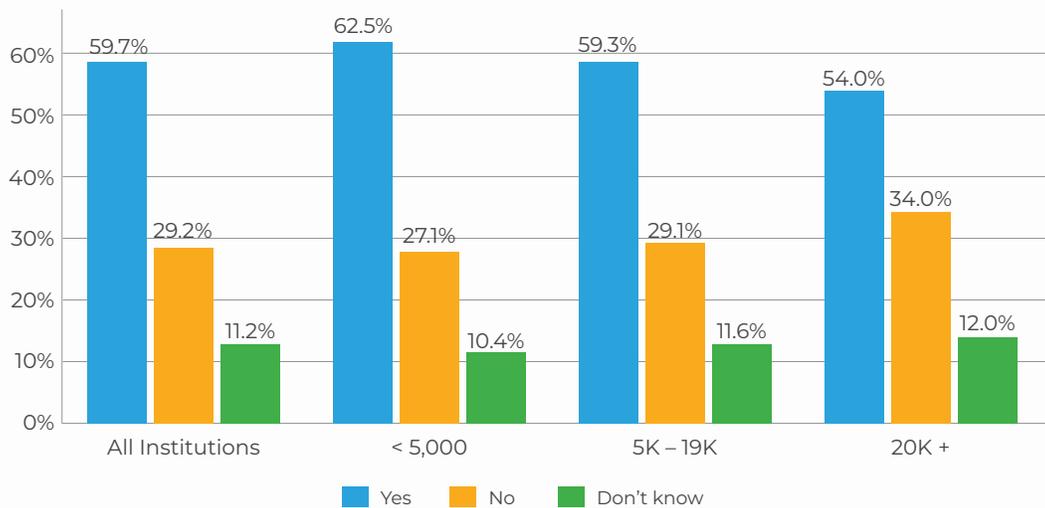


- Doctorate-granting university
- Master's College or University
- Associates College
- Bacallaureate College or University
- Mixed Bacallaureate/Associates College

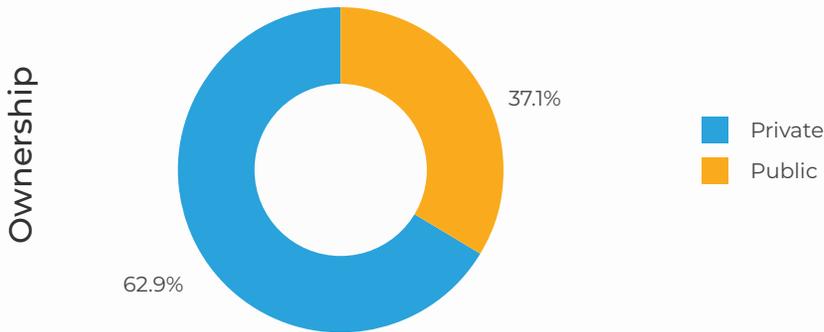
93.7% of the results were evenly distributed across the US, with a small input from Canada



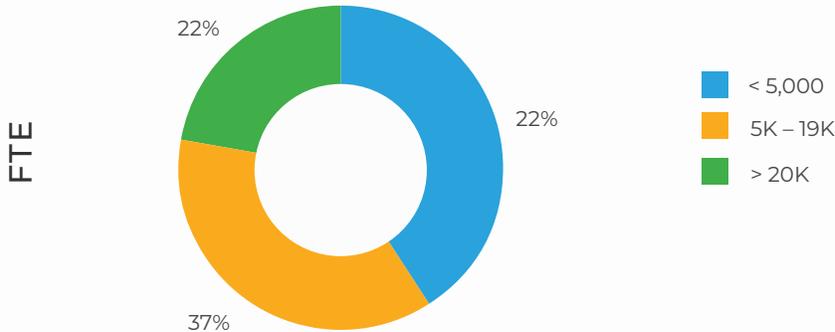
Consortia played a significant role in the results, with 59.7% belonging to one that shared technology



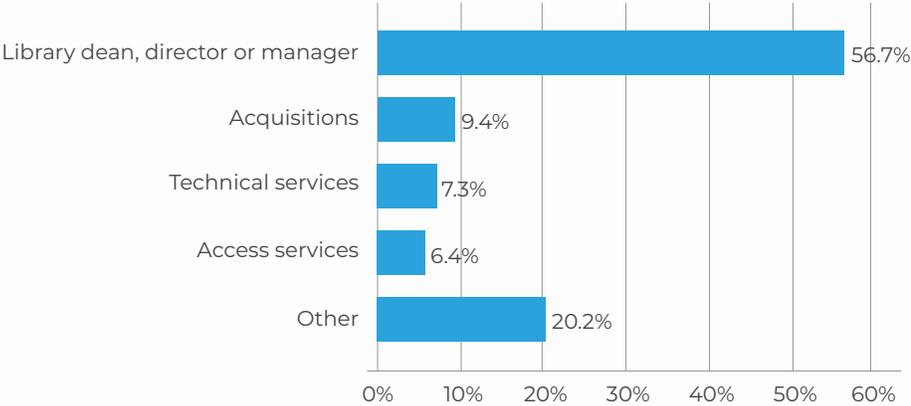
Participants had a 2:1 split between private and public institutions



Respondents reflected a broad range of sizes of colleges, as measured by full-time enrolled



Job function by group



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