NCES Academic Library Survey
Advisory Committee Meeting
New Orleans, LA
Minutes

Meeting: Friday, June 24, 2011  9:00am – 1:00 PM
Morial Convention Center, Room 262

Present:
Advisory committee members: Cathleen Bourdon (ALA-ORS), Joan Giesecke (Director), Laura Hardesty (Census), Jamie Hug (Census), Kit Keller (Chair), Martha Kyrillidou (ARL), Bill Miller (ACRL), Johnny Monaco (Census), Rita Pellen (college), Mary Jane Petrowski (ACRL), Bill Profeta (college), Tai Phan (NCES, survey manager), Norman Rose (ALA-ORS), Cindy Sheckells (Census),

Guests: Julia Blixrud (ARL), Dean Bryan (CUNY), Susan Campbell (College Center for Library Automation, FL), Robert Fox (ARL), Gordon Fretwell, Kim Miller (IMLS); Tom Weko (Associate Commissioner and Post Secondary Division Director, NCES)

1. Preliminaries (Kit Keller)
   a. Introductions
   b. Logistics (breaks, other)
   c. Minutes approval, 2011 Mid-Winter Conference, San Diego
   d. Agenda review, request new items

Kit Keller called the meeting to order. The minutes 2011 Mid-Winter Conference (San Diego) were approved with one correction.

Information Items

2. NCES Update: (Tai Phan)
   a. Tai talked about separating the Academic Library Survey from NCES. There was extensive discussion of a possible transfer of this survey. What implication does move of ALS survey to IPEDS (Integrated Postsecondary Education Data System) collection mean? First, completion of IPEDS is mandatory. So all libraries would have to respond if they receive federal student aid funds. The turn-around time for the release of the data should be about one year. And it’s an annual survey. Questions were raised about the ALS historical data. How will the change affect the survey’s relationship with the ALA, and with the Advisory Committee? Will there be a limit on the number of questions? How will the data entry process be different?
   b. Questions were raised about whether or not the current survey is not valuable because it is biennial, and not prompt enough. Could we have some questions one year, other questions the next year? Adding more questions is up to the IPEDS people.


Census Update (Laura Hardesty, Cindy Sheckells, Jaime Hug, Johnny Monaco)
The 2010 Academic Library Survey closed on April 8, 2011, with an 86.1% response rate. Micro editing (the record level) is done; macro (checking the whole file) editing is in process. Updates to the peer tool are in process.

Other surveys and projects that do or could have an impact on NCES/ALS

a. ARL: (Joan Giesecke) The ARL task force reviewing ARL statistics, ARL Supplementary Statistics, and ARL Annual Salary Survey has collected community input regarding the annual surveys and is using that data to inform the next phase of the review process. There will be fewer but more meaningful questions – more electronic, less separation between electronic and print resources; we are looking to adjust survey for modern usage of resources. Data will be uploaded around September into the metrics tool. Tested revisions to information literacy questions from the NCES survey. Working with Counting Opinions to incorporate ACRL, IPEDS, NCES data into one tool. Will ARL retire survey for IPEDS if it's included? This is likely to happen only if the library data part of the IPEDS survey goes annual; people would love just one survey.

b. ACRL: (Bill Miller) The response rate remains about the same. The survey closed June 15; the print edition will come out in September. It might be possible to retire this survey with the move to IPEDS. Collection counts are becoming less meaningful. Access to information resources is available to materials that aren't solely owned, and are shared. Libraries are looking for metrics that help them make decisions in the 21st century library. Library as place is still important.

c. There was discussion of how universities plan for library funding: Libraries take reductions in the budgets, and often look to foundation funding and to student fees to help fund library. On the private side, libraries also look to endowments, and other private resources. It is often difficult for 2-year schools to fund libraries.

d. IMLS: (Kim Miller) In April, IMLS Director Susan Hildreth split offices, with statistics now in the newly established Office of Policy Planning, Research and Evaluation (OPRE). OPRE is currently evaluating three IMLS programs: Grants to States Program, Museums for American Program, and the Laura Bush 21st Century Librarian Program. The Public Library Data Survey 2009 data are available in the Peer Comparison tool, and is due to be released in mid-June, with a report released by the end of June. FY2010 data collection will close at the end of August. IMLS has suspended the State Library Agency Survey for FY2012 to save money and review the survey.

e. ALA: (Cathleen Bourdon) The Public Library Funding & Technology Access Study was released June 21. Functions as annual “state of the library” report on technology resources. Study funded by Bill & Melinda Gates Foundation and ALA (available: www.alaplinternetfunding). A new title in the ALA Research series has been published: A Strong Future for Public Library Use and Employment, by José-Marie Griffiths and Donald W. King. A Member Satisfaction survey started in August of 2010, polling members in the 6th month of their annual membership. The March 2011 demographic study reports on the 39,874 current members (which is 69% of the total membership) who responded to the survey. The results are
available on the ALA Web site. The search for a new ORS Director has been extended.

5. Discussion of data elements: (Kit Kelle r) Highlights of discussion items are listed. FTE: There’s always questions from respondents about how to define FTE. It needs to be defined more clearly. Also, the survey needs to make a distinction or define the difference between the MLS degree and other similar master's or MLS and ALA-MLS.
Fringe benefits question: Eliminate, modify? It affects library budgets, and is not added to total expenditure total.
Delete expenditures on one-time electronic purchases and audiovisual purchases (there are two questions)? Make into one?
Document delivery: Add fee-based documents to the question?
Preservation: Expenditures are often spread across university units. What about adding staff salaries for staff who work in preservation?
Other expenditures for information resources: This is a catchall that needs to be better defined. Copyright fees are undefined; do they fit here?
Computer hardware/ software: what does the library pay for? Note that this often includes more than just what is spent from the library budget.
400 (Collections): can we create a single element? The people who do the work with collections need to help define the elements. With e-books the question was "is this accessible from your library catalog", which worked well. Can we come up with a data element that matches other surveys collect?
501-504 (Returnable interlibrary loans): Is this needed? Could be interesting to see for peer comparison, but detail may not be needed. What about the numbers received/provided?
508: (Reserve transactions) These are not held by librarians in all libraries, if held electronically.
509: (Information Services to Groups) Do people use this? It needs work.
511-517: (Information services to Individuals) Since these are new questions, there were a lot of questions from respondents. Distinctions by method and time may be too burdensome.
Gate count: Everyone wants to keep it. Many don't report it, but it is a proxy for usage. Delete “in a typical week” part of question.
800-804: (Information literacy) Reduce to one question.

6 Moving ALS to IPEDS (Tom Weko)
Tom presented a PowerPoint that compared some elements of IPEDS with corresponding data elements in the ALS. If re-integration into IPEDS is to be achieved, final changes would be needed by January for the 2012 ALS survey. It's possible the various data elements in the ALS would be distributed over the different components of IPEDS. He said that NCES would convene a Technical Review Panel later in the summer to discuss the re-integration process, and asked for volunteers to attend that meeting. Some highlights of this presentation:

a. All institutions that receive student aid participate (7,178) participate in IPEDS; some non-degree granting institutions also voluntarily participate.
b. IPEDS collects up to 15,000 data elements in three collection windows (fall/winter/spring).

c. A keyholder at each institution is in charge of ensuring data gets to the collector; questions are usually distributed to the managing departments. State coordinators and for-profit school coordinators review data.

d. IPEDS help desk: each survey has an NCES staff member assigned to it.

e. Nearly 100% response rate, since mandatory.

f. Current cost is $8 million to run the survey; the marginal (monetary) cost of adding ALS is small.

g. There is a private data collection contractor who IPEDS works with that convenes Technical Review Panel to improve and discuss collection. Minor changes can happen without a Tech Review Panel, but most changes have to go through a process, public notice, OMB clearance, and then a year where the elements are viewed by survey takes before fully implemented.

h. Data will be available at the data center (http://nces.ed.gov/ipeds/datacenter/) and College Navigator (http://nces.ed.gov/collegenavigator/) and data feedback report; no restricted data file, but may be one in the future.

i. Transition process: first, a background paper would be prepared by NCES; a Technical Review Panel would be convened. There will be more than librarians at the table, so it'll be a different process. Questions would be shifted to appropriate survey areas: staffing questions to HR area, etc. The 2013 the collection system would open with included/integrated ALS elements. Fall 2014, data available in publications.

j. The reporting year is student aid fiscal year (July 1 - June 30). Despite data being collected at different times, it can be disseminated in a group or a peer compare tool. Every element should be annual. Few elements are not.

k. Data checks/verification: Keyholder can check all edits and missing data elements. There is a question about how to verify data (to exclude strange/outlier data) without pre-populated data. Can ALS be mapped back to IPEDS to create a "previous year" value?

l. The limitation to the number of data elements is only from the other higher education members who also have a say in the structure of the overall survey. The proposed changes to the ALS data elements look like they are on the right track for passage by the Technical Review Panel.

Attachment A: Data element revision process; transition of ALS to IPEDS
Attachment B: Tom Weko’s PowerPoint Presentation
Attachment A:

To: Academic Library Survey (ALS) Advisory Committee

From: Kit Keller, ALA Consultant

Date: July 5, 2011

Re: Data element revision process; transition of ALS to IPEDS

Introduction:

A major agenda item at the ALS Advisory Committee meeting held at the annual ALA Conference was the re-integration of the survey to IPEDS. The obvious benefits of this transition are that the survey will be annual, and that participation is mandatory. It also returns the library data in a visible, respected survey instrument. Tom Weko, Associate Commissioner and Postsecondary Division Director at NCES, delivered a presentation comparing the basic elements of both surveys. A copy of this presentation was distributed to the committee following the conference.

Generally we would await the distribution of the meeting minutes to review this particular agenda item. However because of the re-integration process, and the scheduling of a Technical Review Panel (TRP) in August, it’s essential that the committee make decisions about a number of existing data elements. It was explained at the June meeting that Technical Review Panels are comprised of subject specialists who work in an advisory capacity. The August TRP will focus on the library data collection process, and the re-integration process.

Tai Phan, Program Director for the Library Statistics Program, also provided some background information to the transition process. He explained the importance of reviewing the entire survey and determining the purpose and scope of each question. The hope is that the survey can be revised to a leaner, cleaner survey for the 2012 collection process because that survey will be the one that will be integrated into IPEDS. It is likely that the various library data elements of the 2012 survey will be distributed across the nine components of IPEDS.

Committee members participated in a comprehensive discussion of proposed changes to some of the existing data elements. This document is an attempt to recap that discussion, with the caveat that the meeting was not recorded due to a technical failure, and in some instances, no decision was reached. Some additional data elements are reviewed here as well in an attempt to address potential problem items.

Technical Review Panel #35 is scheduled for August 2-3, in Washington, DC, so it’s essential that each member of the advisory committee provide feedback on this document by July 15.

For ease of review and assimilation, I ask that you provide your feedback using the ‘insert comments’ feature, making sure that the comments identify you as the respondent. I will then revise the document based on the feedback provided.

Academic Library Survey Data Elements:

Staff

#200 Librarians – Number of FTEs
Current definition: Report the total FTE of staff whose duties require professional education (the master's degree or its equivalent) in the theoretical and scientific aspects of librarianship.

#201 Other professional staff – Number of FTEs

Current definition: Other professional staff - Report the total FTE of staff whose duties require education and/or training in related fields (e.g., academic disciplines, archives, media, computing).

Note: Jamie Lauer (Census) suggested including within the question an explanation of how to figure FTEs. This is a frequent question asked of the help desk.

Kim Miller (IMLS) suggested using the staff section of the State Library Agency Survey as a model for revising this data element.

Recommended revision:

Library Staff – Number of FTEs

Enter the total number of library staff in FTEs (full-time equivalents, to 2 decimal places). Report all staff on the payroll and unfilled but budgeted positions.

Note: Forty hours-per-week is the measure of full-time employment for this survey. FTEs (full-time equivalents) should be computed by taking the number of hours worked per week by all the employees in a category and dividing it by 40.

(a) Librarians: Employees in positions that require MLS/MLIS degrees.
(b) Other professional staff: Employees without an MLS/MLIS degree but in positions that require education and/or training in related fields (e.g., academic disciplines, archives, media, computing).
(c) Student assistants: All student assistants working in the library, regardless of funding source.
(d) Other staff: All other employees not included above.

Total staff: Sum of items a—d.

#206 Employee fringe benefits — Are employee fringe benefits paid from the library budget? (Yes/No)

Current definition: If benefits are paid from the library budget, select "Y" and report the amount in item 207. If benefits are not paid from the library budget, select "N" and skip to item 300.

Recommended revision:

None. Keep this data element as is.

Expenditures

Information resources:

#300 Books, serial backfiles, and other materials (one time purchases)
Current definition: Report expenditures for published materials in all formats except current subscriptions toserials.

#301 One-time purchases of electronic books, serial backfiles and other materials

Current definition: Report expenditures that are not current subscriptions to serials (i.e. are non-subscription, one-time, or monographic in nature) for software and machine-readable materials considered part of the collections. Examples include serial backfiles, literature collections, and one-time costs for electronic backfiles, etc. These expenditures have already been reported as part of item 300 above. Therefore, item 301 is not added into Total Expenditures (item 311).

#302 One-time purchases of audiovisual books, serial backfiles and other materials

Current definition: Report expenditures for all library materials that are displayed by visual projection or magnification or through sound reproduction, or both, including graphic materials, audio materials, motion pictures, video materials, and special visual materials such as three-dimensional materials. These expenditures have already been reported as part of item 300 above. Therefore, item 302 is not added into Total Expenditures (item 311).

#303 Ongoing commitments to serial subscriptions

Current definition: Report expenditures for ongoing subscriptions to serials in all formats. These are publications issued in successive parts, usually at regular intervals, and, as a rule, intended to be continued indefinitely. Serials include periodicals, newspapers, annuals (reports, yearbooks, etc.), memoirs, proceedings, and transactions of societies.

#304 Electronic serials

Current definition: Report subscription expenditures (or those which are expected to be ongoing commitments) for serial publications whose primary format is electronic. Examples include paid subscriptions for electronic journals and indexes/abstracts available via the Internet, CD-ROM serials, and annual access fees. These expenditures have already been reported as part of item 303. Therefore, item 304 is not added into Total Expenditures (item 311).

Recommended revision:

1. Print materials: Report expenditures on books, periodicals, newspapers, annuals, government documents, and numbered monographic series received in print form.
2. E-books: Report expenditures for electronic monographs that have been cataloged by your library and are accessible through the library's catalog. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired.
3. Databases: Report expenditures for database licenses (subscription or one-time purchases.)
   Note: The data or records of a database are usually collected with a particular intent and relate to a defined topic. A database may be issued on CD-ROM, or other direct access method, or as a file accessed via the Internet. Do NOT include electronic serial subscriptions (e.g., Project MUSE).
4. Electronic serial subscriptions: Report expenditures for electronic, electronic and other format, and digital serial subscriptions. Electronic serial subscriptions include serials held locally or remote resources that the library has authorization to access, including those available through
statewide or consortia agreements. Do not include subscriptions to indexing and abstracting databases that include full-text serial content (e.g., EBSCO Host, ProQuest).

Library Collection Expenditures: Total of 1 through 4.

**Other information resources:**

#305 Document delivery/interlibrary loan

Current definition: Report expenditures for document delivery and interlibrary loan services. Include fees paid for photocopies, costs of facsimile transmission, royalties and access fees paid to provide document delivery or interlibrary loan. Include fees paid to bibliographic utilities if the portion paid for interlibrary loan can be separately counted. Do not count expenditures related to transactions between the main or central library and branches reported in item 100, transactions between branches (item 100), or expenditures for on campus delivery.

**Recommended revision:**
Retain #305, with revisions.

Document delivery/interlibrary loan: Report all expenditures associated with providing access to information resources through interlibrary loan and fee-based document delivery services.

#306 Preservation

Current definition: Report expenditures associated with maintaining library and archival materials for use either in their original physical form or in some other usable way. This includes but is not limited to binding and rebinding, materials conservation, deacidification, lamination, and restoration. Also, include preservation-related contracts for services (e.g. digitization). Do not include staff salaries and wages.

**Recommended revision:**
Delete this data element

307 Other expenditures for information resources

Current definition: Report any other collection expenditures not already included in previous items, such as expenditures for cartographic materials and manuscripts. Include copyright fees and fees for database searches, e.g. (DIALOG, Lexis-Nexis).

**Recommended revision:**
Retain #307, with revisions:

Definition: Report any other collection expenditures not already included in previous items.

**Operating expenditures**

#308 Computer hardware and software

Current definition: Report expenditures from the library budget for computer hardware and software used to support library operations, whether purchased or leased, local or remote. Include expenditures
for maintenance. Include the expenditure for equipment used to run information service products when that expenditure can be separated from the price of the product. Exclude expenditures reported in item 304.

**Recommended revision:**

Retain #308, with revisions:

Definition: Report all capital expenditures for computer hardware and software used to support library operations.

#309 Bibliographic utilities, networks, and consortia

Current definition: Report expenditures from the library operating budget for services provided by national, regional, and local bibliographic utilities, networks, and consortia. Exclude expenditures already reported on items 301, 304, and 305.

**Recommended revision:**

Delete #309

#310 All other operating expenditures

Current definition: Report all other expenditures from the library budget not already reported in items 205 through 309 except employee fringe benefits that are reported in item 207. Exclude expenditures for new buildings and building renovations. Include all expenditures for furniture and equipment except computer hardware, which should be reported in item 308. Include any related maintenance costs.

**Recommended revision:**

Retain #310, with revisions:

Report all other expenditures from the library budget not already reported in previous items. Include any related maintenance costs. Exclude expenditures for new buildings and building renovations.

**Collections**

#400-405 Collections: for the following items we ask that libraries report the number of each item added during the fiscal year

#400 Books, serial backfiles and other paper materials (include government documents)

Current definition: Books, serial backfiles and other paper materials (include government documents) (item 400) - Report the number of volumes using the ANSI/NISO Z39.7-1995 definition for volume, which is as follows: A single physical unit of any printed, typewritten, handwritten, mimeographed, or processed work, distinguished from other units by a separate binding, encasement, portfolio, or other clear distinction, which has been cataloged, classified, and made ready for use, and which is typically the unit used to charge circulation transactions. Include print photographs, duplicates and bound volumes of periodicals. For purposes of this questionnaire, unclassified bound serials arranged in alphabetical order are considered classified. Exclude microfilms, maps, nonprint materials, and uncataloged items. Include Government document volumes that are accessible through the library's catalogs regardless of
whether they are separately shelved. "Classified" includes documents arranged by Superintendent of Documents, CODOC, or similar numbers. "Cataloged" includes documents for which records are provided by the library or downloaded from other sources into the library's card or online catalogs.

#401   E-Books

Current definition: Report the number of electronic monographs that have been cataloged by your library and are accessible through the library's catalog.

#402   Microforms

Current definition: Report units of all photographic reproduction of textual, tabular, or graphic materials reduced in size so that they can be used only with magnification. Examples of microforms are roll microfilm, microcard, microfiche, and ultramicrofiche.

#403   Audiovisual materials

Current definition: Report units of all library materials that are displayed by visual projection or magnification or through sound reproduction, or both, including graphic materials, audio materials (include audio books), motion pictures, video materials, and special visual materials such as three-dimensional materials.

#404   Current serials titles

Current definition: Report the total number of titles in all formats. If the title comes in both paper and electronic form, count it twice. Count each individual title if it is received as part of a publisher’s package. Include paper and microfilm government documents issued serially if they are accessible through the library’s catalog. Report indexing and abstracting services that may contain full-text in item 405.

#405   Electronic reference sources and aggregation services

Current definition: Report the total number of citation indexes and abstracts; full-text article databases; full-text reference sources (e.g., encyclopedias, almanacs, biographical and statistical sources and other quick fact-finding sources); dissertation and conference proceedings databases. Licensed electronic resources also include those databases that institutions mount locally. [Aggregation services are defined by NISO Z39.7-2004 as "4.10.3.2 Aggregated Full Text Databases: Collection of both bibliographic references and full text articles from periodical and/or other titles presented on a continuous basis that may relate to a common discipline or may provide multi-disciplinary coverage. This includes electronic reference and indexing tools that, if existed in print form, would be counted as periodicals. The content of aggregated full text databases consists predominately of full text articles rather than bibliographic references without associated full text, although both may be represented in the database."

Recommended revision:

1. Print materials: Report the number of books, periodicals, newspapers, annuals, government documents, and numbered monographic series received in print form.
2. E-books: Report the number of electronic monographs that have been cataloged by your library and are accessible through the library's catalog. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired.
3. Databases: Report the number of database licenses (subscription or one-time purchases.) Each licensed database product is counted individually even if access to several licensed database products is supported through the same interface (e.g., ProQuest, EBSCO Host). Note: The data or records are usually collected with a particular intent and relate to a defined topic. A database may be issued on CD-ROM, or other direct access method, or as a file accessed via the Internet. Do NOT include electronic serial subscriptions (e.g., Project MUSE).

4. Electronic serial subscriptions: Report the number of electronic, electronic and other format, and digital serial subscriptions. Electronic serial subscriptions include serials held locally or remote resources that the library has authorization to access, including those available through statewide or consortia agreements. Do not include subscriptions to indexing and abstracting databases that include full-text serial content (e.g., EBSCO Host, ProQuest).

Collection total: 1 + 2 + 3 + 4

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Services

#500 Returnable Interlibrary loans and documents provided to other libraries

#501 Non-returnable Interlibrary loans and documents provided to other libraries

Current definition: In items 500 and 501, report the number of filled requests for material provided to other libraries.

#503 Returnable interlibrary loans and documents received

#504 Non-returnable interlibrary loans and documents received

Current definition: Report materials that the library expects to have returned. Examples of returnables include books, dissertations and theses, microfilm reels, sound recordings, and audiovisual material.

#505 Documents received from commercial services

Current definition: Report the number of documents from commercial document delivery services received by your users. Count all transactions for which the library pays even if library staff is not involved in the transaction. Include documents received by regular or express mail, by fax, or in electronic form.

Recommended revision:

#500 Report the number of interlibrary loan items received from other libraries.

#501 Report the number of interlibrary loan items provided to other libraries.

Circulation

#507 General circulation transactions

Current definition: Report the number of items lent from the general collection. Include both initial transactions and renewals.
**Recommended revision:**

Report the annual circulation of all library materials of all types, including renewals.

#508 Reserve circulation transactions

Current definition: Report reserve transactions of all types. Include both initial transactions and renewals.

**Recommended revision:**

Delete this data element.

**Library services**

Current definition: Collect data during a typical week in the fall. A typical week is one that is neither unusually busy nor unusually slow. Avoid vacation periods for key staff or days when unusual events are taking place on the campus or in the library. Choose a week in which the library is open its regular hours. Include any seven consecutive calendar days. If waiting for a typical week ... will delay this form, please use typical week data from the preceding fiscal year. If you have data for the entire year, divide by the number of weeks that the library was open.

**Recommended revision:**

Report actual annual figures.

**Information services to groups**

#509 Number of presentations

#510 Total attendance at all presentations

Current definition: Report the total number of presentations (item 509) and the total number of persons attending or served by those presentations (item 510). Information services to groups are presentations at which a staff member or person invited by a staff member provides information intended for a number of persons and planned in advance. These services may be either bibliographic instruction or library use presentations, or cultural, recreational, or educational presentations. Presentations both on and off the library premises should be included, as long as they are sponsored by the library. Self-paced tutorials and staff training should be excluded, as well as meetings sponsored by other groups using library meeting rooms. Include web-based presentations.

**Recommended revision:**

#509 Number of instructional presentations

#510 Total attendance at and use of instructional presentations

Report the total number of instructional presentations (item 509) and the total number of persons attending or served by those instructional presentations (item 510). Information services to groups are planned, scheduled instructional presentations at which a staff member or person invited by a staff
member provides information intended for a number of persons. These services may be either bibliographic instruction or library use presentations, or cultural, recreational, or educational presentations. Include all library-sponsored presentations both on and off the library premises. Include the number of web-based presentations provided. Exclude staff training sessions and meetings sponsored by other groups using library space.

**Information services to individuals**

Reference (under 20 minutes)

#511 In-person

#512 Virtual

Consultations (20 minutes or more)

#514 In-person

#515 Virtual

Current definition: Reference and consultation interactions are information contacts that involve the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Information sources include printed and non-printed materials, machine-readable databases (including assistance with computer searching), the Web, catalogs and other holdings records, and, through communication or referral, other libraries and institutions, and persons both inside and outside the library.

Reference interactions may be in person, by phone, by e-mail, by the Web, and may take place at the reference desk or elsewhere and take less than 20 minutes to complete. Include information and referral services. Consultation interactions typically occur in person and take longer than 20 minutes to complete.

If a contact includes both reference and directional services, it should be reported as one reference transaction. When a staff member utilizes information gained from a previous use of information sources to answer a question, report as a reference transaction, even if the source is not consulted again during this transaction.

Do not report directional transactions here. A directional transaction is an information contact which facilitates the use of the library in which the contact occurs and which does NOT involve the knowledge, use, recommendation, interpretation, or instruction in the use of any information sources other than those which describe the library; such as schedules, floor plans, handbooks, and policy statements. Examples of directional transactions include giving instruction in locating, within the library, staff, library users, or physical features, etc., and giving assistance of a nonbibliographic nature with machines.

#517 Total information services to individuals (sums of above items)

**Recommended revision:**

Reference transactions: A reference transaction is an information contact that involves the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Information sources used include printed and non-printed materials,
databases (including assistance with computer searching), the Web, catalogs and other holdings records, and, through communication or referral, other libraries and institutions, and persons both inside and outside the library. The transaction may be conducted in person, by phone, fax, mail, email, or through an online communication tool. Examples of Chat reference tools are QuestionPoint, Tutor.com, Meebo, and Library Help. [Note: do not include directional transactions or questions about rules and policies.]

#511 Report the total number of reference transactions.

#600 Number of weekly public service hours

Current definition: Report an unduplicated count of the total public service hours for physical libraries per typical full-service week (i.e., no holidays or other special accommodations) across both main library and branches

Recommended revision:

None. Keep this data element as is.

#601 Gate count in a typical week

Current definition: Report the number of persons who physically enter library facilities in a typical week. It is understood that a single person may be counted more than once. If the library is virtual or entirely electronic, please leave the line blank.

Recommended revision:

Gate count. Report the total number of persons entering the library for whatever purpose during the year. [Note: Remember to divide the total gate count in half.]

Services

Does your library provide the following? [Yes/No]

#700 Documents digitized by the library staff

#701 Library reference service by e-mail or the Web

#702 Technology to assist patrons with disabilities

#703 Electronic theses and dissertations produced by your students

Recommended revision:

Delete #700 and #701

Information Literacy

#800-804 Items 800-804 ask about information literacy activities undertaken by the postsecondary institution, not by the library.
Current questions:

Does your postsecondary institution have the following, or has it done the following? [Yes/No]

#800 A definition of information literacy or of an information literate student

#801 Incorporated information literacy in the institutions’ mission

#802 Incorporated information literacy in the institution’s strategic plan

#803 An institution-wide committee to implement the strategic plans for information literacy

#804 The strategic plan formally recognizes the library’s role in information literacy instruction?

Recommended revision:

Does your postsecondary institution have the following, or has it done the following? [Yes/No]

1. A definition of information literacy or of an information literate student

2. Incorporated information literacy in the institution's student learning outcomes