

Information Services and Use: Metrics and Statistics for Libraries and Information Providers – Data Dictionary

Abstract: This standard is a data dictionary for identifying standard definitions, methods, and practices relevant to library statistics activities in the United States. It aims to assist the information community by indicating and defining useful, quantifiable information to measure the resources and performance of libraries and to provide a body of valid and comparable data on American libraries.

An American National Standard
Developed by the
National Information Standards Organization

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NISO
3600 Clipper Mill Road
Suite 302
Baltimore, MD 21211
www.niso.org

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Contents

Foreword	vii
1 Introduction	1
1.1 Scope	1
1.2 Purpose	1
1.3 Application	1
1.4 Format	1
1.5 General Principles.....	2
1.6 Using the Library Statistics Data Dictionary	2
2 Reporting Unit and Primary Target Population	3
2.1 Reporting Unit.....	3
2.1.1 Academic Library.....	3
2.1.2 Administrative Unit.....	3
2.1.3 Bookmobile	4
2.1.4 Branch Library.....	4
2.1.5 Government Library	4
2.1.6 Health Services/Medical Library.....	4
2.1.7 Industrial/Commercial Library	5
2.1.8 Law Library.....	5
2.1.9 Library Cooperative	5
2.1.10 Main Library	6
2.1.11 National Library	6
2.1.12 Public Library.....	6
2.1.13 School Library Media Center.....	6
2.1.14 Special Library.....	7
2.1.15 State Library Agency	7
2.2 Primary Target Population.....	7
2.2.1 Academic Library Target Population	8
2.2.2 Network and Cooperative Target Population	8
2.2.3 Public Library Target Population	8
2.2.4 School Library Media Center Target Population	9
2.2.5 Special Library Target Population	9
2.2.6 State Library Agency Target Population	9
3 Human Resources	10
3.1 Certified Library Media Specialist	10
3.2 Contributed Services Staff.....	10
3.3 Other Staff	11
3.4 Professional Staff.....	11
3.5 Qualified Specialist Staff	11
3.6 Staff Training	12
3.6.1 Number of Staff Trained	12
3.6.2 Staff Hours of Training.....	12
3.7 Student Assistants	12

**ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries
and Information Providers — Data Dictionary**

3.8	Volunteers	12
4	Collections	13
4.1	Archives and Manuscripts	14
4.1.1	Cubic Feet.....	14
4.1.2	Linear Feet Added.....	15
4.1.3	Linear Feet Held.....	15
4.2	Audiovisual Materials	15
4.2.1	Audiovisual Materials Additions – Units.....	15
4.2.2	Audiovisual Materials Additions – Titles	16
4.2.3	Audiovisual Materials Holdings – Units	16
4.2.4	Audiovisual Materials Holdings – Titles	16
4.3	Books and Serials.....	16
4.3.1	Books and Serials Additions – Units.....	17
4.3.2	Books and Serials Additions – Titles	17
4.3.3	Books and Serials Holdings – Titles.....	17
4.3.4	Books and Serials Holdings – Volumes.....	17
4.3.5	E-books.....	17
4.3.6	Current Serials Received.....	17
4.4	Cartographic Materials.....	19
4.4.1	Cartographic Materials Additions – Units.....	19
4.4.2	Cartographic Materials Holdings – Units	19
4.5	Government Documents	19
4.5.1	Government Documents Additions – Units.....	20
4.5.2	Government Documents Holdings – Titles	20
4.6	Graphic Materials.....	20
4.6.1	Graphic Materials Additions – Units	20
4.6.2	Graphic Materials Holdings – Units.....	20
4.7	Microforms.....	21
4.7.1	Microforms Additions – Units	21
4.7.2	Microforms Holdings – Units.....	21
4.8	Other Materials – Print and Electronic	21
4.8.1	Computer Files.....	22
4.8.2	Databases.....	22
4.8.3	Digital Documents	23
4.8.4	Free Internet Resources	23
4.8.5	Other Digital Documents.....	23
4.8.6	Other Materials Additions – Units.....	23
4.8.7	Other Materials Holdings – Units.....	24
5	Infrastructure	24
5.1	Gross Measured Area	24
5.2	Net Usable Area.....	25
5.3	Net Usable Area by Function.....	25
5.4	Facilities.....	25
5.4.1	Mobile Facilities.....	26
5.4.2	Physical Facilities	26
5.5	Seating Capacity.....	26

**ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries
and Information Providers — Data Dictionary**

5.6	Workstations	26
5.6.1	Available Internet Workstations	27
5.6.2	Available Workstations	27
6	Finances	27
6.1	Capital Expenditures	27
6.2	Capital Revenue by Source	28
6.2.1	Federal Government Capital Revenue	28
6.2.2	Local Government Capital Revenue	28
6.2.3	Other Sources of Capital Revenue	29
6.2.4	State Government Capital Revenue	29
6.3	Operating Expenditures by Type of Expenditure	29
6.3.1	Audiovisual Materials Expenditures	30
6.3.2	Bibliographic Utilities, Networks and Consortia Expenditures	30
6.3.3	Book and Serial Backfile Expenditures (one-time expenditures)	30
6.3.4	Collection Expenditures	31
6.3.5	Computer Hardware, Software, Supplies and Maintenance Expenditures	31
6.3.6	Current Serial Expenditures	31
6.3.7	Document Delivery/Interlibrary Loan Expenditures	32
6.3.8	Electronic Access Expenditures	32
6.3.9	Electronic Materials Expenditures	32
6.3.10	Employee Benefit Expenditures	33
6.3.11	Furnishing and Equipment Expenditures	33
6.3.12	Microform Material Expenditures	33
6.3.13	Other Operating Expenditures	34
6.3.14	Preservation Expenditures	34
6.3.15	Professional Staff Salaries and Wages	34
6.3.16	Student Assistant Salaries and Wages	35
6.3.17	Support Staff Salaries and Wages	35
6.4	Operating Income by Source	35
6.4.1	Federal Government Income	36
6.4.2	Local Government Income	36
6.4.3	Other Sources of Income	36
6.4.4	State Government Income	36
7	Services	37
7.1	Gate Count	37
7.2	Hours Open	37
7.2.1	Hours Open in Branch Libraries	38
7.2.2	Hours Open in Main/Central Library	38
7.3	Information Requests	38
7.3.1	Virtual Reference Transactions	39
7.4	Library Events/Programs	40
7.4.1	Attendance at Library Events	40
7.5	Library User	40
7.6	Loans and Document Delivery	40
7.6.1	Electronic Document Delivery	41
7.6.2	External Document Supply	41
7.6.3	Interlibrary Loan	42

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

7.7 Use.....	42
7.7.1 Electronic Collection	44
7.7.2 In House Use.....	46
7.7.3 Internet Access.....	46
7.7.4 Number of Public Access Workstation Users	47
7.8 User Orientation and Training.....	47
7.8.1 Attendance at User Training	47
7.8.2 Formal User Information Technology Training.....	47
7.8.3 Information Services to Groups.....	48
7.8.4 Point-of-Use Information Technology Training	48
7.8.5 User Training.....	48
Appendix A (normative): Survey Information.....	49
Appendix B (informative): E-metrics Elements.....	50
Appendix C (informative): Additional Resources for Library Metrics	51

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Foreword

(This foreword is not part of *Information Services and Use: Metrics and Statistics for Libraries and Information Providers – Data Dictionary*, ANSI/NISO Z39.7-2013. It is included for information only.)

About This Standard

This standard was first published in 1968, reaffirmed in 1974, and revised in 1983, 1995, and 2004. This 2013 revision is the fifth edition of the standard.

2004 Edition: Online Data Dictionary

The 2004 revision differed significantly from its predecessors in its approach. It took the path of developing a web-based utility for identifying standard definitions, methods, and practices relevant to library statistics activities in the United States. Like the previous editions of Z39.7 the aim of the standard remains: to assist librarians and researchers [now defined as the information community] by indicating and defining useful quantifiable information to measure the resources and performance of libraries and to provide a body of valid and comparable data on American libraries. The 2004 edition also changed the name from *Library Statistics* to its current title, *Information Services and Use: Metrics and Statistics for Libraries and Information Providers – Data Dictionary*.

When the standard came up for its regular review in 2000, NISO organized an invitational workshop to explore directions and possible parameters for revising Z39.7 to reflect the current best practices. The *NISO Forum on Performance Measures and Statistics for Libraries* was held February 15-16, 2001 in Washington, D.C. In a structured setting, the Forum participants interactively examined current standards and best practices for library statistics and performance measures. Forum participants charted approaches to the issues including the data collection categories and performance measures that might be changed, added, or deleted and what organizations should participate on the standards committee tasked to revise and/or expand the NISO standard. Current standards and best practices for library statistics and performance measures were discussed and identified as critical to the next edition of Z39.7.

The 2004 revision absorbed the de facto definitions established through the national program for collecting data about libraries (i.e., the National Center for Education Statistics (NCES) survey program), and relevant U.S. association definitions, methods and practices of data collection. The value of this approach is that it recognizes the guidelines and best practices in the area of library statistics across the community, not only at the national survey level.

As in the 1995 edition, most of the data elements included appeared on one or more of the national and association surveys. In addition, relevant definitions from the international standard ISO 2789 developed were incorporated.

2013 Edition: Continuous Maintenance

In 2008, at the recommendation of NISO's Business Information Topic Committee, the standard was transferred to a continuous maintenance mode. A Z39.7 Standing Committee was formed to review comments and suggested changes on a biannual basis, initially at the midwinter and annual conferences. The Data Dictionary was modified to allow anyone to comment online.

The accepted comments and additional changes made by the Z39.7 Standing Committee to reflect changes in cited statistics surveys and new statistics to reflect changes for electronic documents and related services were added. One notable change is the integration of the former Appendix regarding Methods of Measurement into the body of the standard. The 2013 version is an aggregation of all the changes made since the standard was transferred to continuous maintenance. After using the online data dictionary, it became more apparent that document layout and organization were not fully complete. Some sections have been cleaned up, reformatted, and better organized. Also, the e-metrics have been integrated to make them easier to use.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Note that the surveys listed after the individual data elements collected that data element at some point, but they may not necessarily be collecting it at the present time. Links for surveys lead the user to the main page for the survey series, which link to historical surveys as well as the current survey.

Instructions for Submittal of Proposed Change to ANSI/NISO Z39.7 Under Continuous Maintenance

If a provision of the standard is proposed to be added or deleted, the text of the provision must be submitted in writing. Comments or proposals for revisions to any part of the standard may be submitted to NISO any time. Submissions must be accompanied by the submitter's name, affiliation, telephone number, and e-mail address.

Written comments are to be sent to:

National Information Standards Organization (NISO) - ANSI/NISO Z39.7
Attn: Nettie Lagace, Associate Director for Programs
3600 Clipper Mill Road
Suite 302
Baltimore, MD 21211
Tel.: 301-654-2512 (main)
Fax: 410-685-5278

Comments may also be submitted to NISO online at www.niso.org/contact/

All submittals received by NISO are acknowledged and forwarded to the Standing Committee for consideration. The Standing Committee will inform submitters of the disposition of their substantive proposals. Consideration will be given to proposed changes according to the following schedule:

- **Deadline: May 31** – Consideration to take place during the Standing Committee's monthly teleconference, to take place during June, and no later than July of the same year.
- **Deadline: December 15** – Consideration to take place during the Standing Committee's monthly teleconference, to take place during January of the following year.

Proposals received after the above deadlines shall be considered by the Standing Committee no later than the subsequent Standing Committee biannual review meeting.

NISO Business Information Topic Committee

At the time this standard was approved, the following individuals served on the Business Information Topic Committee that had oversight for this project:

Ivy Anderson
California Digital Library

Niels Dam, Co-chair through 1/31/2013
Elsevier

Denise Davis, Co-chair after 1/31/2013
Sacramento Public Library

Herbert Gruttemeier
Institut de l'Information Scientifique et Technique
(INIST)

William Hoffman
Swets Information Services

Norm Medeiros
Haverford College

Christine Stamison
Swets Information Services

Timothy Strawn
California Polytechnic State University

Karla Strieb, Co-chair
Ohio State University Libraries

Gary Van Overborg
Scholarly iQ

Charles Watkinson
Purdue University Libraries

Michael Zeoli
YBP Library Services

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

NISO Voting Members

The following organizations were members of the NISO voting pool that approved this standard.

American Library Association (ALA)
Nancy Kraft

Association for Information Science & Technology (ASIS&T)
Mark Needleman

American Theological Library Association (ATLA)
Brenda Bailey-Hainer

Association of Research Libraries (ARL)
Julia Blixrud

Auto-Graphics, Inc.
Ted Koppel

Ex Libris, Inc.
Mike Dicus

Innovative Interfaces, Inc.
John McCullough

ITHAKA/JSTOR/Portico
Amy Kirchhoff

Library of Congress
John Zagas

Los Alamos National Laboratory
Miriam Blake

Lyrasis
Peter Murray

Minitex
Cecelia Boone

Music Library Association
Mark McKnight

National Archives and Records Administration (NARA)
Marilyn Redman

National Federation of Advanced Information Services (NFAIS)
Marjorie Hlava

Ringgold, Inc.
Donald Chvatal

Scholarly iQ
Gary Van Overborg

Serials Solutions
Ashley Bass

The Library Corporation (TLC)
Juli Marsh

Z39.7 Standing Committee

The NISO Z39.7 Standing Committee that prepared this revision had the following members:

John Carlo Bertot
University of Maryland

Julia Blixrud
Association of Research Libraries (ARL)

Dianne Carty
Massachusetts Board of Library Commissioners

Denise Davis
Sacramento Public Library

Laura Hardesty
U.S. Bureau of the Census

Everett Henderson
Institute of Museum and Library Services (IMLS)

Steve Hiller
University of Washington

Jamie Hug
U.S. Bureau of the Census

Martha Kyrillidou, Chair
Association of Research Libraries (ARL)

Keith Lance
American Library Association Committee on Research and Statistics (CORS)

Rochelle Logan
American Library Association Committee on Research and Statistics (CORS)

Carlos Manjarrez
Institute of Museum and Library Services (IMLS)

Kim Miller
Institute of Museum and Library Services (IMLS)

Doug Newcomb
Special Libraries Association (SLA)

Mary Jane Petrowski
Association of College and Research Libraries (ACRL)

Peggy Rudd
Chief Officers of State Library Agencies (COSLA)

Cindy Sheckells
U.S. Bureau of the Census

Charles Stewart
The City College of New York (CCNY)

Deanne Swan
Institute of Museum and Library Services (IMLS)

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1 Introduction

1.1 Scope

This standard identifies categories for basic library statistical data reported at the national level, and provides associated definitions of terms. In doing so it deals with the following areas: reporting unit and target population, human resources, collection resources, infrastructure, finances, and services. In addition, the standard identifies new measures associated with networked services, databases, and performance. These measures are reported at a variety of levels, and at the time of this writing were slowly being incorporated into national library statistical data reports.

The standard is not intended to be comprehensive in scope. Instead, it presents a framework for comparable library data by describing common elements pertaining to libraries of various types in the US. It does not address detailed statistics for specific areas where it seems more appropriate for experts in those areas to make recommendations (e.g., music, government documents, and maps).

1.2 Purpose

The purpose of this standard is to assist the information community in the identification, definition, collection, and interpretation of statistical data used to describe the current status and condition of libraries in the US. In addition, it assists that community in collecting the data necessary to support research and analysis directed toward improving the performance of libraries and enhancing library effectiveness.

1.3 Application

This standard is primarily for library managers and those who collect data from libraries. For library managers, the standard indicates categories for measurement of library resources, services and activities, staffing, and infrastructure. For data collectors, the standard indicates categories for consideration in constructing data collection instruments. The standard also provides guidance to others interested in information about statistical measures related to library services. Applicability of this standard may be at the local, state, national, or international levels.

1.4 Format

The format of this standard is by section, category, and then by subcategory. Sections are broad in scope, categories provide more precise divisions within a section, and subcategories provide the most specific division within a section. The categories and subcategories are organized alphabetically, to the extent possible. E-metrics are arranged as categories or within subcategories as appropriate. The six sections, including brief descriptions, are:

- **Reporting Unit and Primary Target Population** (Section 2)
Describes types of libraries, the entity that has administrative or budgetary control, and the populations served by each.
- **Human Resources** (Section 3)
Describes all levels of staffing associated with each library type.
- **Collections** (Section 4)
Describes broad collection categories in all formats.
- **Infrastructure** (Section 5)
Describes facilities, including capacity and technology.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

- **Finances** (Section 6)
Describes broad categories of revenue (e.g., income) and expenditure by type and source.
- **Services** (Section 7)
Describes broad categories of services provided by libraries including hours of operation, as well as other metrics associated with understanding library use both tangible and virtual.

In addition to formal sections, there is one normative and two informative appendices:

- **Appendix A (normative): Survey Information** – a list of the metrics surveys that are referenced throughout the standard, including name, date/version/frequency, sponsor, and website.
- **Appendix B (informative): E-metrics Elements** – summary of the metrics in the standard that are for electronic resources and related services.
- **Appendix C (informative): Additional Resources for Library Metrics**

1.5 General Principles

The following general principles are the basis of this standard:

- 1.5.1 Data categories are mutually exclusive as far as possible.
- 1.5.2 Collection resource categories are based on the following sources: *Anglo-American Cataloguing Rules*, second edition, revised; and *MARC21 Format for Bibliographic Data Including Guidelines for Content Designation*.
- 1.5.3 Data categories are constructed to provide annual figures as far as possible.
- 1.5.4 The standard suggests that data be collected so that expenditures can be reported both for all serials and for individual formats because serial publications in all formats are an increasingly important factor in library budgets. See Section [6](#), *Finances*.
- 1.5.5 Most data categories in the standard are common to current instruments used to collect data from academic, public, and school libraries by the federal government and other national agencies and associations. Beyond this common level, the standard identifies other data categories currently collected from one or more types of libraries but not from all. Those categories are identified in the database through metatags. The library types include: public, state, academic, school, special, network & cooperative.
- 1.5.6 Categories of data may be provided by a source other than the library. Therefore, a source notation is made in each Section category. The sources are: library, vendor.
- 1.5.7 This standard acknowledges national survey instruments as well as guidelines and “best practices.” Therefore, the applicability of the definition, method, and measurement require delineation. The applicability metatags are: local, state, national, and international.
- 1.5.8 A metatag has been included to advise the user whether the data category represents a total that can be aggregated. The aggregate metatags are: yes, no.

1.6 Using the Library Statistics Data Dictionary

This standard has been published as an online web document for easier use and navigation.

There is a variety of navigation options within the online Data Dictionary, including:

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

- Linking to specific categories, sections, and subsections within the full data dictionary via the Table of Contents.
- Browsing alphabetically in the Index.

2 Reporting Unit and Primary Target Population

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

2.1 Reporting Unit

The reporting unit varies by type of library but is generally the entity that has administrative and budgetary control.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: no

2.1.1 Academic Library

A library forming an integral part of a college, university, or other academic institution for postsecondary education, organized and administered to meet the needs of students, faculty, and affiliated staff of the institution.

NOTE: An academic library's population may include undergraduate and graduate students as well as faculty. The central library facility normally reports for branch and independent libraries (e.g. law or medical libraries) of a particular institution or campus.

Source: library

Applicability: international, local, national, state

Library Type: academic

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[State Library Agency Survey](#)

2.1.2 Administrative Unit

Any independent library, or a group of libraries, under a single director or a single administration.

NOTE 1: The term "independent" does not imply legal or financial independence but only that the library is a recognizably separate unit, typically within a larger organization.

NOTE 2: Typically the administrative unit is an organization containing a central/main library, branch libraries, and administrative functions.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

2.1.3 Bookmobile

A bookmobile is a traveling branch library. It consists of at least all of the following:

1. A truck or van that carries an organized collection of library materials
2. Paid staff
3. Regularly scheduled hours (bookmobile stops) for being open to the public

Source: library

Applicability: international, local, national, state

Library Type: public, school, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

2.1.4 Branch Library

A branch library is an auxiliary unit of an administrative entity that has at least all of the following:

1. Separate quarters
2. An organized collection of library materials
3. Paid staff
4. Regularly scheduled hours for being open to the public

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

2.1.5 Government Library

A library maintained to serve any government service, department or agency, or parliament, including international, national, and local (regional) government organizations.

Source: library

Applicability: international, local, national, state

Library Type: special, state

Aggregate: yes

[State Library Agency Survey \(1994-2010\)](#)

2.1.6 Health Services/Medical Library

A library that serves health service professionals in hospitals or elsewhere, whether in the private or public sector.

NOTE: Pharmaceutical company libraries should be included under [2.1.7](#), Industrial/Commercial Library.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Source: library
Applicability: international, local, national, state
Library Type: special
Aggregate: yes

2.1.7 Industrial/Commercial Library

A library in any industrial enterprise or business firm, maintained by the parent organization to serve the information needs of its staff.

NOTE: Includes libraries maintained by information and management consultants, manufacturing and service industries and libraries of commercial legal practices.

Source: library
Applicability: international, local, national, state
Library Type: special
Aggregate: yes

2.1.8 Law Library

A typical law library will include in its collection a large number of works not seen in other libraries, including a full set of United States Reports, one or both of the unofficial U.S. Supreme Court reporters, the West National Reporter System, the West American Digest System, official reporters from various states, the Federal Register, volumes of American Jurisprudence, bound volumes containing issues of prominent law reviews from around the country, federal and state statutes and regulations (such as the United States Code and Code of Federal Regulations), and a variety of treatises, encyclopedias, looseleaf services, and practice guides.

Source: library
Applicability: international, local, national, state
Library Type: special
Aggregate: yes

2.1.9 Library Cooperative

A Library Cooperative (network, system, and consortium) is an organization that has a formal arrangement whereby library and information services are supported for the mutual benefit of participating libraries. It must meet all of the following criteria:

1. Participants/members are primarily libraries.
2. The organization is a U.S. not-for-profit entity that has its own budget and its own paid staff.
3. The organization serves multiple institutions (e.g., libraries, school districts) that are not under the organization's administrative control.
4. The scope of the organization's activities includes support of library and information services by performing such functions as resource sharing, training, planning, and advocacy.

Source: library
Applicability: international, national, state
Library Type: cooperative, network
Aggregate: yes

[ASCLA Library Networks, Cooperatives and Consortia Database](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

2.1.10 Main Library

A main or central library is a single outlet library or the library that is the operational center of a multiple-outlet library. Usually all processing is centralized here and the principal collections are housed here.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

2.1.11 National Library

A library that is responsible for acquiring and conserving copies of all relevant documents to the country in which the library is located; it may function as a legal deposit library.

NOTE 1: A National Library will also normally perform some or all of the following functions: produce the national bibliography, hold and keep up to date a large and representative collection of foreign literature including documents about the country; act as a national bibliographic information center; compile union catalogues; supervise the administration of other libraries and/or promote collaboration; coordinate a research and development service, etc.

NOTE 2: The definition of national library allows for more than one in a country.

Source: library

Applicability: international, national, state

Library Type: special

Aggregate: yes

2.1.12 Public Library

A library that serves all residents of a given community, district, or region, and (typically) receives its financial support, in whole or part, from public funds. Public libraries make their basic collections and services available to the population of their legal service area without charges to individual users. Products and services beyond the library's basic services may or may not be provided to the public, with or without individual charges. Individual charges may be assessed to library users outside the legal service area of the library. In addition to including the tax-supported municipal, county, and regional public libraries, this definition includes privately- and federally-controlled libraries governed by single board of trustees or other authority, and administered by a single director. Examples of public libraries include:

- A city library with its branches.
- A county, multicounty, or regional library with outlets functioning as branches.

Source: library

Applicability: international, local, national, state

Library Type: public

Aggregate: yes

[Public Libraries Survey](#)

[State Library Agency Survey](#)

2.1.13 School Library Media Center

A library that is an integral part of the educational program of an elementary or secondary school providing materials and services that meet the curricular, information, and recreational needs of students,

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teachers, and administrators. This entity may be called a library, media center, resource center, information center, instructional materials center, learning resource center, or some other name.

Source: library

Applicability: international, local, national, state

Library Type: school

Aggregate: yes

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

2.1.14 Special Library

A special library is a library within a business firm, professional association, government agency, hospital, research institution or other organized group; a library maintained by a parent organization to support a specialized clientele; or an independent library that may provide materials or services or both to the public, or to other libraries. Special libraries are sometimes called information centers. Scope of collections and services are limited to the subject interests of the host or parent organization and usually have depth within those subject areas.

Source: library

Applicability: international, local, national, state

Library Type: special

Aggregate: yes

2.1.15 State Library Agency

A State Library Agency is the official agency of a State charged by the law of that State with the extension and development of public library services throughout the State, and has adequate authority under the law of the State to administer State plans in accordance with the provisions of the Library Services and Technology Act (LSTA).

Source: library

Applicability: international, national, state

Library Type: state

Aggregate: yes

[State Library Agency Survey](#)

2.2 Primary Target Population

The primary target population varies by type of library. It is the group of persons for which the library (reporting unit) has been established to offer services and from which it derives its identity. The primary target populations are noted in each subcategory. Secondary populations served are not included. It is recommended that library service mission, policies, and/or guidelines be consulted to understand the target populations for any given library or information organization.

Total Unduplicated Population of Legal Service Areas – This is the total unduplicated population of those areas in your state that receive library services. The population of un-served areas is not included in this figure.

NOTE: A state's actual total population of legal service areas may be different.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

2.2.1 Academic Library Target Population

An academic library's target population may include undergraduates and graduate students as well as faculty.

Source: library

Applicability: international, local, national, state

Library Type: academic

Aggregate: yes

[ARL Statistics Questionnaire](#)

Subsets of the Academic Library target population include:

- **2.2.1.1 Faculty: Full time**
- **2.2.1.2 Faculty: Part time**
- **2.2.1.3 Graduate and First Professional Students: Full Time**
- **2.2.1.4 Graduate and First Professional Students: Part Time**
- **2.2.1.5 Undergraduate Students: Full Time**
- **2.2.1.6 Undergraduate Students: Part Time**

2.2.2 Network and Cooperative Target Population

The target population for a library network or cooperative is the participating libraries.

Source: library

Applicability: international, national, state

Library Type: cooperative, network

Aggregate: yes

Subsets of the Network and Cooperative target population include:

- **2.2.2.1 Academic Libraries**
- **2.2.2.2 Public Libraries**
- **2.2.2.3 School Library Media Centers**
- **2.2.2.4 Special Libraries**

2.2.3 Public Library Target Population

The target population of a public library is the population of the legal service area.

Population of the Legal Service Area – The total unduplicated population of those areas in a state that receive library services. The population of unserved areas is not included in this figure.

NOTE 1: For states that have no overlapping jurisdictions, this number will be identical to the state's total population of legal service areas.

NOTE 2: The state's most recent official state population figures for jurisdictions in the state are used as the basis for calculating the total unduplicated population of legal service areas.

Source: library

Applicability: international, local, national, state

Library Type: public

Aggregate: yes

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

2.2.4 School Library Media Center Target Population

The target population of a school library media center is both the students and faculty.

Source: library

Applicability: international, local, national, state

Library Type: school

Aggregate: yes

2.2.5 Special Library Target Population

The target population of a special library is the group of persons that the special library is intended to serve, generally the employees of the parent organization.

Source: library

Applicability: international, local, national, state

Library Type: special

Aggregate: yes

2.2.6 State Library Agency Target Population

The target population of a state library agency may include blind and physically handicapped individuals, residents of State correctional institutions, residents of other State institutions, State government employees, and the general public.

NOTE: State library agencies may include archives. The governance structure of archives is outside the scope of this data dictionary.

Source: library

Applicability: international, national, state

Library Type: state

Aggregate: yes

[State Library Agency Survey](#)

2.2.6.1 Blind and Physically Handicapped Individuals.

Outlets serving this user group may contain talking books on discs and tapes and books in Braille made available from the National Library Service for the Blind and Physically Handicapped, a division of the Library of Congress. In addition, these outlets may contain large print books for the visually handicapped and captioned films for the deaf. These outlets provide library materials and library services to blind or physically handicapped residents who have been certified by competent authority as unable to read or to use conventional printed materials as a result of physical limitations.

2.2.6.2 General Public

Outlets serving this user group function as the state-level equivalent of a local public library, providing books, other library materials, and electronic access to locally-mounted and remote information resources for all State residents. These outlets serve the general public, regardless of whether they are open on a walk-in or referral basis.

2.2.6.3 Residents of Other State Institutions

Outlets serving this user group provide books, other library materials, access to other information resources, and other library services to patients or residents of residential training schools, hospitals, nursing homes, and other general or special institutions operated or substantially supported by the State.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

2.2.6.4 Residents of State Correctional Institutions

Outlets serving this user group provide books, other library materials, access to other information resources and other library services to residents of prisons, reformatories, and other correctional institutions operated or substantially supported by the State.

2.2.6.5 State Government Employees, (executive, legislative, or judicial)

Outlets serving this user group provide books, other library materials, access to other information resources and other library services to employees of all branches of State government.

3 Human Resources

Total Full Time Equivalent Employees (FTE) – Report the number of filled or temporarily vacant FTE positions paid from funds under library control during the Fall of the fiscal year being reported. To compute FTE's of part-time staff members and student assistants, take the TOTAL number of hours worked per week by part-time staff members **in each category** and divide it by the number of hours **considered by the reporting library to be a full-time work week** (e.g., 60 hours per week of part-time work divided by 40 hours per full-time week equals 1.50 FTE). Data should be reported to two decimal places.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

3.1 Certified Library Media Specialist

Library staff member who has met the state's regular or standard certification requirements in the library media specialty area.

NOTE: Includes those who have completed all necessary course work and are eligible for full certification upon completion of a probationary period.

Source: library

Applicability: local, national, state

Library Type: school, special

Aggregate: yes

[School Library Media Center Survey](#)

3.2 Contributed Services Staff

Library staff, such as members of religious orders, whose services are valued by bookkeeping entries rather than by full cash transactions.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

NOTE: Does not include volunteers.

Source: library

Applicability: local, national, state

Library Type: academic, public, school, special

Aggregate: yes

[Academic Library Survey](#)

[School Library Media Center Survey](#)

3.3 Other Staff

Library staff member without formal qualification in librarianship/information science or other relevant specialization, not included elsewhere.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

3.4 Professional Staff

Staff members doing work that requires professional education (the master's degree or its equivalent) in the theoretical and scientific aspects of librarianship; also, in some libraries, staff performing professional level tasks who, though not librarians, have equivalent education and training in related fields (e.g., archives, preservation or conservation, computer sciences, business administration, education).

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

3.5 Qualified Specialist Staff

Library staff members who have received training in a specialist discipline other than librarianship and/or information science.

NOTE: The training may be by formal education or by means of an external period of work of a professional nature under supervision in a specialization such as accountancy, computing, staff management, bookbinding.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

3.6 Staff Training

Formal staff training received inside or outside of the library.

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

3.6.1 Number of Staff Trained

Number of staff who have received formal training during the reporting period.

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

[State Library Agency Survey](#)

3.6.2 Staff Hours of Training

Hours of formal training received by staff during the reporting period.

Source: library
Applicability: local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

3.7 Student Assistants

Student assistants, employed on an hourly basis whose wages are paid from funds under library control or from a budget other than the library budget, including College Work Study Program.

NOTE: Does not include maintenance and custodial staff.

Source: library
Applicability: local, national, state
Library Type: academic, school, special
Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[School Library Media Center Survey](#)

3.8 Volunteers

Persons working on library tasks without payment.

NOTE: Volunteers may receive token reimbursements or expense allowances.

[School Library Media Center Survey](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special
Aggregate: yes

4 Collections

Documents held locally and remote resources for which permanent or temporary access rights have been acquired.

The library collection consists of all documents provided by a library for its users. Collections comprise documents held locally and remote resources for which permanent or temporary access rights have been acquired.

NOTE 1: Access rights may be acquired by the library itself, by a consortium, and/or through external funding.

NOTE 2: Acquisition is to be understood as deliberately selecting a document, securing access rights, and including it in the OPAC or other databases of the library.

NOTE 3: Interlibrary lending and document delivery are excluded.

NOTE 4: Does not include links to Internet resources for which the library has not secured access rights by legal agreements (e.g., legal deposit right), license or other contractual, and/or co-operative agreement. Free Internet resources that have been catalogued by the library in its OPAC or a database should be counted separately (see ISO 2789, 6.2.14).

Total Number of Materials Held at End of Fiscal Year – Report the total number of each category held at end of fiscal year. To get this figure, take the total number held at the end of the previous fiscal year, add the number added during the fiscal year just ended, and subtract the number withdrawn during that period.

The following terms apply to all categories within Collections and, to reduce duplication of term identification within categories and subcategories, precede specific categories of collections.

Access Rights – Rights for reaching or using the library collection. For the electronic collection, this implies that the library has secured permanent or temporary access for its users by law, license, or other contractual and/or co-operative agreement.

Addition (Acquisitions) – Document or item added to a collection during the reporting period. Additions may be obtained, for example, by purchase, licensing, legal deposit, donation, or exchange. Added units or added titles are units or titles that have been cataloged according to *Anglo-American Cataloguing Rules* or for which other inventory records have been made available to users (e.g., minimal or provisional catalog records, accession records, or records in a database file).

Document – Recorded information or material object which can be treated as a unit in a documentation process [ISO 5127]. Documents may differ in their physical and electronic form and characteristics.

Electronic [Digital] Unit – An individual item of library materials in a computer-accessible format for which the library has secured permanent or temporary access for its users by law, license, or other contractual and/or co-operative agreement.

Holdings – Number of documents of a certain type (e.g. books and serials, microforms, electronic serials) held locally or in remote resources for which access rights have been acquired, at least for a certain period of time. To be measured at the end of the reporting period.

NOTE: Referred to as “stock” in ISO 2798.

Title – The designation of a separate bibliographic whole, whether issued in one or several volumes, reels, discs, slides, or other parts. Titles are defined according to the *Anglo-American Cataloguing Rules*. A book or serial title may be distinguished from other such titles by its unique International Standard Book Number (ISBN) or International Standard Serial Number (ISSN). This definition applies equally to print, electronic, audiovisual, and other library materials. For unpublished works, the term is used to designate

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

a manuscript collection or an archival record series. Two subscriptions to *Science* magazine, for example, are counted as one title. When vertical file materials are counted, a file folder is considered a title.

Unit – An individual item of library materials. A coherent document unit, inclusive of any protective devices, freely movable against other document units.

NOTE 1: Coherence may be achieved, for example, by binding, encasement, or digital containment.

NOTE 2: For printed documents, the term “volume” (see below) is used for the unit. Examples of physical units are: a volume (books or serials); a linear foot (manuscripts and archives); a reel, sheet, or card (microforms); a sheet or bound atlas (cartographic materials); a film, slide, photograph, or picture (graphic materials); a disk, cassette, cartridge, or reel (sound recordings, motion pictures, and video recordings); and disks, tapes, or cartridges (computer files).

NOTE 3: For electronic documents, the term “volume” (see below) may be used for the unit. Examples of electronic document units are: a volume (books or serials); measured by file size (MB, etc.); electronic cartographic images; electronic slide, photograph, or picture (graphic images); electronic audio and video files (sound recordings, motion pictures, and video recordings); and computer files.

Volume – 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. Either a serial volume is bound or it comprises the serial issues that would be bound together if the library bound all serials.

Withdrawal – Document or item withdrawn from a collection during the reporting period. Withdrawals may be effected, for example, by discarding, transferring, or in the case of electronic resources by deletion from files or canceling licenses.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

4.1 Archives and Manuscripts

Archives - The non-current records of an organization or institution preserved because of their continuing value.

Manuscripts -Works written by hand or typed, including books, dissertations, letters, speeches, music, legal papers, and printed forms completed by hand.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.1.1 Cubic Feet

Cubic feet is a measurement of volume for collections.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

NOTE: A cubic foot is the volume equal to a cube that measures one foot on each side.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: no

4.1.2 Linear Feet Added

Linear feet is a measurement of shelf or file space occupied by a collection.

NOTE: A linear foot is a straight-line measurement of one foot in length.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.1.3 Linear Feet Held

Linear feet is a measurement of shelf or file space occupied by a collection.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.2 Audiovisual Materials

Materials that are displayed by visual projection or magnification, or through sound reproduction, or both, including sound recordings, motion pictures and video recordings, and graphic materials. Also included in this category are special visual materials such as three-dimensional artifacts and realia, and web-based audiovisual resources. [See also ISO 5127, 2.1.19, audio-visual document.]

NOTE: This includes audio documents such as records, tapes, cassettes, audio compact discs, files of digital audio recordings; visual documents such as slides, transparencies, and combined audiovisual documents such as motion pictures, video recordings, etc. Microforms are excluded.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

4.2.1 Audiovisual Materials Additions – Units

See introduction to Section [4](#).

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

4.2.2 Audiovisual Materials Additions – Titles

See introduction to Section [4](#).

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

4.2.3 Audiovisual Materials Holdings – Units

See introduction to Section [4](#).

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

4.2.4 Audiovisual Materials Holdings – Titles

See introduction to Section [4](#).

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

4.3 Books and Serials

Book – A non-serial publication of any length bound in hard or soft covers or in loose-leaf or electronic format. Also called monograph. Includes printed sheet music and Braille.

Print Materials – Materials consisting primarily of words and usually produced by making an impression with ink on paper. Included in this definition are materials that do not require magnification (books, journals, pamphlets, and printed sheets including music and two-dimensional cartographic materials), as well as printed materials that require magnification (microforms). This also includes Braille materials.

Serial – A publication in any medium issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This definition includes, in any format, periodicals, newspapers, and annuals (reports, yearbooks, etc.); the journals, memoirs, proceedings, transactions, etc. of societies; and numbered monographic series.

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

[State Library Agency Survey](#)

4.3.1 Books and Serials Additions – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.3.2 Books and Serials Additions – Titles

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.3.3 Books and Serials Holdings – Titles

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.3.4 Books and Serials Holdings – Volumes

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

4.3.5 E-books

Digital documents, licensed or not, where searchable text is prevalent, and which can be seen in analogy to a print book (monograph). The use of e-books is in many cases dependent on a dedicated device and/or a special reader or viewing software.

NOTE 1: E-books can be lent to users either on portable devices (e-book readers) or by transmitting the contents to the user's PC for a limited time period.

NOTE 2: Doctoral dissertations in electronic format are included.

4.3.6 Current Serials Received

Documents in print or in electronic form, issued in successive parts, usually having numerical or chronological designations, and intended to be continued indefinitely, whatever its periodicity.

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NOTE 1: Serials published in electronic form only or in both electronic and other format.

NOTE 2: Comprises serials held locally and remote resources for which access rights have been acquired, at least for a certain period of time.

NOTE 3: Include duplicate subscriptions.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

4.3.6.1 Current Serial Titles

Serial title refers to the bibliographic entity represented regardless of the number of subscriptions to that entity in a given format.

[ARL Statistics Questionnaire](#)

4.3.6.1.1 Electronic/Digital Serial Titles

Serials published in electronic form only or in both electronic and other format.

NOTE 1: Comprises serials held locally and remote resources for which access rights have been acquired, at least for a certain period of time and for which the institution has access rights.

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#) (Electronic serial subscriptions will no longer be collected after the FY 2009 survey)

4.3.6.1.2 Print/Microform Serial Titles

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.3.6.2 Current Subscriptions

Subscriptions refer to the arrangements by which, in return for a sum paid in advance, periodicals, newspapers, or other serials are provided for a specified number of issues. These include print/microfilm subscriptions, and electronic/digital subscriptions.

NOTE: Include duplicate subscriptions.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

4.3.6.2.1 Electronic/Digital Subscriptions

Digital documents, licensed or not, where searchable text is prevalent, and which can be seen in analogy to a print serial. The use of e-serials is in many cases dependent on a computer other portable device.

NOTE 1: Also called e-serials.

NOTE 2: E-serials can be accessed by users based on access rights of the serial content.

4.3.6.2.2 Print/Microfilm Subscriptions

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

4.4 Cartographic Materials

Materials representing in whole or in part the earth or any celestial body at any scale (e.g., maps and charts).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.4.1 Cartographic Materials Additions – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.4.2 Cartographic Materials Holdings – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.5 Government Documents

Book, serial, or other library material publications, in all formats, that are published by a government agency, e.g., the publications of federal, state, local, and foreign governments and of intergovernmental

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

organizations to which governments belong and appoint representatives, such as the United Nations, Organization of American States, and the Erie Basin Commission graphic materials.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[State Library Agency Survey](#)

4.5.1 Government Documents Additions – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.5.2 Government Documents Holdings – Titles

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.6 Graphic Materials

Opaque (e.g., two-dimensional) art originals and reproductions, charts, photographs or materials intended to be projected or viewed without sound, e.g., filmstrips, transparencies, photographs, posters, pictures, radiographs, slides, and collections of such materials.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.6.1 Graphic Materials Additions – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

4.6.2 Graphic Materials Holdings – Units

See introduction to Section [4](#).

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

[ARL Statistics Questionnaire](#)

4.7 Microforms

Photographic reproductions of textual, tabular, or graphic material reduced in size so that they can be used only with magnification. The two main types of microforms are micro reproductions on transparent material, including roll microfilm, aperture cards, microfiche, and ultrafiche, and reproductions on opaque material.

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

4.7.1 Microforms Additions – Units

See introduction to Section [4](#).

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

4.7.2 Microforms Holdings – Units

See introduction to Section [4](#).

Source: library
Applicability: international, local, national, state
Library Type: academic, cooperative, network, public, school, special, state
Aggregate: yes

4.8 Other Materials – Print and Electronic

Non-electronic documents or items other than books; serials; manuscripts; printed music documents; microforms; cartographic, audiovisual or graphic documents; artifacts or patents separately specified in this standard.

Electronic documents or items include databases, free Internet resources and other digital documents.

Electronic Collection – All resources in electronic form in the library collection.

NOTE 1: The electronic collection includes databases, electronic serials, and digital documents. Free Internet resources that which been catalogued by the library in its OPAC or a database should be counted separately.

Access Rights –Rights for reaching or using the library collection. For the electronic collection, this implies that the library has secured permanent or temporary access for its users by law, license, or other contractual and/or co-operative agreement.

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Multimedia documents – Documents combining different information media (text, graphics, photos, video, audio) in digital format. Multimedia documents are counted according to their main feature or purpose (e.g., as database, electronic serial or digital document).

Other Library Documents – Non-electronic documents or items other than books, serials, manuscripts, printed music documents, microforms, cartographic materials, audiovisual materials, or graphic documents, separately specified in this standard. This includes items such as dioramas and other three-dimensional documents, games, toys, etc. Documents in Braille are counted as print documents.

Patents – Government documents granting an inventor the sole right to use or license an invention together with associated documentation.

Printed Music Documents – Documents, the essential content of which is a representation of music, normally by means of notes. May be in sheet or codex form.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.8.1 Computer Files

The number of pieces of computer-readable disks, tapes, CD-ROMs, and similar machine-readable files comprising data or programs that are locally held as part of the library's collections available to library clients. Examples are U.S. Census data tapes, sample research software, locally mounted databases, and reference tools on CD-ROM, tape or disk.

NOTE: Does not include bibliographic records used to manage the collection (i.e., the library's own catalog in machine-readable form), library system software, and microcomputer software used only by the library staff.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

4.8.2 Databases

Collection of electronically stored data or unit records (facts, bibliographic data, and texts) with a common user interface and software for the retrieval and manipulation of the data.

NOTE 1: The data or records are usually collected with a particular intent and are related to a defined topic.

NOTE 2: A database may be issued on CD-ROM, diskette, or other direct access method, or as a computer file accessed via dial-up methods or via the Internet.

NOTE 3: When access to more than one licensed database is effected through the same interface, each database should be counted separately.

[Academic Library Survey](#)

4.8.2.1 Abstract and Indexing Databases

Collection of bibliographic references analyzing and presenting on a continuous basis periodical and/or other titles that usually relate to a common discipline or geographic area. This includes electronic reference and indexing tools which, if existing in print form, would be counted as periodicals. The content of abstract and indexing databases consists predominately of bibliographic references without associated full text articles, although both may be represented in the database.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

4.8.2.2 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 which, if existing 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.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: no

[State Library Agency Survey](#)

4.8.3 Digital Documents

Information unit with a defined content that has been digitized by the library or acquired in digital form as part of the library collection. This includes electronic patents, networked audiovisual documents and other digital documents, e.g. reports, cartographic and music documents, pre-prints etc. Databases and electronic serials are excluded.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

4.8.4 Free Internet Resources

The number of links to unique free Internet resources (websites, digital documents, databases, electronic journals, etc.) which have been catalogued by the library in its OPAC or a database.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: no

4.8.5 Other Digital Documents

Digital documents other than an e-book, networked audiovisual document or electronic patent, e.g. report, pre-print, cartographic or music documents, exhibits, etc., in electronic format.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: no

4.8.6 Other Materials Additions – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

4.8.7 Other Materials Holdings – Units

See introduction to Section [4](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

5 Infrastructure

The library infrastructure pertains to facilities, including capacity and usable space, and technology. Hours open is discussed in Section [7](#), Services. Infrastructure measurements are related to the following categories: [5.1](#) Gross Measured Area; [5.2](#) Net Usable Area; [5.3](#) Net Usable Area by Function; [5.4](#) Facilities; [5.5](#) Seating Capacity; and [5.6](#) Workstations. Methods of measurement within these categories include square footage, linear feet, cubic feet, and physical item count.

Methods of measurement within these categories include square footage, linear feet, cubic feet, and physical item count. The IMLS survey of public library data reports square footage of facilities, and a definition is available from the [IMLS website](#). The FSCS survey of public library data reports square footage of facilities, and a definition is available from the [NCES website](#). The U. S. National Archives & Records Administration (NARA) and the Society of American Archivists (SAA) provide useful information on these methods. SAA has published [A Glossary of Archival and Records Terminology](#) by Richard Pearce-Moses and NARA has developed a [Lifecycle Data Requirements Guide](#).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

5.1 Gross Measured Area

Total space (square footage) in the library building or buildings.

NOTE: Areas devoted to cafes, gift shops, and staff recreation areas may be reported separately.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

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[Public Libraries Survey](#)

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5.2 Net Usable Area

Includes space for readers and reading areas, materials shelving and storage areas, space for services to clientele, public service desks, exhibit space, equipment areas aisles, and all other space used for library resources and services. Excludes vestibules, lobbies, traffic areas, janitorial or custodial storage and service areas, rest rooms, staff recreation area, cafes, elevators, stairway space, building corridors, space occupied by heating ventilation and cooling devices.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

5.3 Net Usable Area by Function

The total net usable area may be allocated to the following functions:

- **User Services** – Includes space for reading, studying, and information delivery. Computer terminals and any other services delivered to users, also open access storage areas as integrated part of user service areas.
- **Library Operations** – Includes receipt of materials, bindery, acquisitions, cataloging, computing, and management.
- **Materials Storage** – Includes all areas devoted principally to storing materials whether open access or closed.
- **Events** – Includes seminar and meeting rooms, space for meetings and storytelling, and formal exhibition space.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

5.4 Facilities

A physically separate location where library materials and services are provided to the library's clientele. A facility has a staff and a permanent collection of library materials, and is usually, but not necessarily, separate from other facilities. This definition includes stationary facilities (e.g., a central facility, a branch library) and bookmobiles.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

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[ARL Statistics Questionnaire](#)

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[Public Libraries Survey](#)

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5.4.1 Mobile Facilities

A library, usually an outlet of a library, using specially equipped transport and furnished to provide documents and services direct to users as an alternative to access on library premises.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

5.4.2 Physical Facilities

All stationary physical library outlets (central and branch).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

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[State Library Agency Survey](#)

5.5 Seating Capacity

Seats provided for users for reading or studying whether with or without equipment. Includes seats in carrels, in seminar and study rooms and the audiovisual and children's departments of the library. Includes seats in computer labs only if the labs are managed or operated by the library. Excludes seats in halls, and theaters intended for audiences of special events. Also excludes informal seating such as, floor space on which users may sit.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[School Library Media Center Survey](#)

5.6 Workstations

A computer workstation may be stand-alone or networked, or a dumb terminal.

Number of Public Access Workstations – Annual count of the total number of library owned public access graphical workstations that connect to the Internet for a dedicated purpose (to access an OPAC or other purposes). Collect and report this statistic for each participating branch, if applicable. (Branch Level Statistic).

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Computers in computer labs used for public instruction if graphical and connected to the Internet should be counted. Public access graphical workstations that connect to the Internet that are used by both staff and the public should be counted if the workstation is used by the public for at least half of the hours during an average week that the library is open to the public. Reference desk computers used by staff to assist the public should not be counted.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[School Library Media Center Survey](#)

5.6.1 Available Internet Workstations

Number of workstations in the library available to users and connected to the Internet.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

5.6.2 Available Workstations

Number of workstations in the library available to users.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

6 Finances

Income and expenditures during the reporting period.

Expenditures – Report funds expended by the library in the fiscal year being measured (regardless of when received) from its regular budget and from all other sources (e.g., research grants, special projects, gifts and endowments, and fees for services). If items in this section are not paid from the library budget but can be easily identified in other parts of the institution's budget, report them here. Expenditures should be reported for the 12-month period that corresponds to your library's fiscal year. Fiscal years typically commence between the calendar period June 1 to September 30. All expenditures should be reported in whole dollars in the most appropriate category to provide an unduplicated count of expenditures. **Do not report any expenditures more than once.**

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

6.1 Capital Expenditures

Funds expended for the acquisition of or additions to fixed assets such as building sites, new buildings and building additions, new equipment (including major computer installations), initial collections, furnishings for new or expanded buildings, and new vehicles. These expenditures exclude replacement

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and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. (Also referred to as Capital Outlay.)

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

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[State Library Agency Survey](#)

6.2 Capital Revenue by Source

Revenue that will be used for major capital expenditures. Examples include funds received for a) site acquisition; b) new buildings; c) additions to or renovation of library buildings; d) furnishings, equipment, and initial book stock for new buildings, building additions, or building renovations; e) library automation systems; f) new vehicles; and g) other one-time major projects. Includes: federal, state, local and other revenue to be used for major capital expenditures. Excludes revenue to be used for replacement and repair of existing furnishings and equipment; regular purchase of library materials; investments for capital appreciation; contributions to endowments; income passed through to another agency (e.g., fines); or funds unspent in the previous fiscal year (e.g., carryover).

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

6.2.1 Federal Government Capital Revenue

All federal government funds, including federal funds distributed by the state or locality, and grants and aid received by a library for the purpose of major capital expenditures.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

6.2.2 Local Government Capital Revenue

All governmental funds designated by a community, district, or region and available to a library for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

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6.2.3 Other Sources of Capital Revenue

All income for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

6.2.4 State Government Capital Revenue

All funds distributed to a library by State government for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

6.3 Operating Expenditures by Type of Expenditure

Current and recurrent costs necessary for the provision of library services, such as personnel, library materials, binding, supplies, repair, or replacement of existing furnishings and equipment, and costs incurred in the operation and maintenance of the physical facility.

Report funds expended by the library in the fiscal year being measured (regardless of when received) from its regular budget and from all other sources (e.g., research grants, special projects, gifts and endowments, and fees for services). If items in this section are not paid from the library budget but can be easily identified in other parts of the institution's budget, report them here. Expenditures should be reported for the 12-month period that corresponds to your library's fiscal year. Fiscal years typically commence between the calendar period June 1 to September 30. All expenditures should be reported in whole dollars in the most appropriate category to provide an unduplicated count of expenditures. **Do not report any expenditures more than once.**

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

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[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

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6.3.1 Audiovisual Materials Expenditures

Expenditures for materials that are displayed by visual projection or magnification, or through sound reproduction, or both, including sound recordings, motion pictures and video recordings, and graphic materials.

NOTE 1: This includes expenditures for special visual materials such as three-dimensional artifacts and realia, documents in which sound and/or pictures are prominent, and which requires the use of special equipment to be seen and/or heard [ISO 5127-11].

NOTE 2: This includes expenditures for audio documents such as records, tapes, cassettes, audio compact discs, files of digital audio recordings; visual documents such as slides, transparencies, and combined audiovisual documents such as motion pictures, video recordings, etc.

NOTE 3: Microforms are excluded.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[School Library Media Center Survey](#)

6.3.2 Bibliographic Utilities, Networks and Consortia Expenditures

Expenditures for services provided by national, regional, and local bibliographic utilities, networks, and consortia.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

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[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

6.3.3 Book and Serial Backfile Expenditures (one-time expenditures)

Expenditures for:

- **Book** – A non-serial printed publication of any length bound in hard or soft covers or in looseleaf format. Also called monograph. Includes sheet music.
- **Print Materials** – Materials consisting primarily of words and usually produced by making an impression with ink on paper. Included in this definition are materials that do not require magnification (books, journals, pamphlets, and printed sheets including music and two-dimensional cartographic materials), as well as printed materials that require magnification (microforms).
- **Serial** – A publication in any medium issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This definition includes periodicals, newspapers, and annuals (reports, yearbooks, etc.); the journals, memoirs, proceedings, transactions, etc. of societies; and numbered monographic series.

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Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

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[ARL Statistics Questionnaire](#)

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[Public Libraries Survey](#)

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[State Library Agency Survey](#)

6.3.4 Collection Expenditures

All expenditures for materials purchased or leased for use by the public, such as print materials (including microforms), machine-readable materials, audiovisual materials, etc.

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

[ASCLA Library Networks, Cooperatives and Consortia](#)

[ARL Statistics Questionnaire](#)

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[State Library Agency Survey](#)

6.3.5 Computer Hardware, Software, Supplies and Maintenance Expenditures

Expenditures from the library budget for computer hardware and software used to support library operations, whether purchased or leased, mainframe or microcomputer. Includes expenditures for maintenance and for equipment used to run information service products when that expenditure can be separated from the price of the product.

Source: library
Applicability: international, local, national, state
Library Type: academic, cooperative, network, public, school, special, state
Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

6.3.6 Current Serial Expenditures

Expenditures for print, microfilm, and electronic or digital subscriptions.

Source: library
Applicability: international, local, national, state
Library Type: academic, public, school, special, state
Aggregate: yes

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ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

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[School Library Media Center Survey](#)

Subsets of current serial expenditures are:

- 6.6.6.1 Current Serial Expenditures – Electronic
- 6.3.6.2 Current Serial Expenditures – Paper and Microform

6.3.7 Document Delivery/Interlibrary Loan Expenditures

Expenditures for document delivery and interlibrary loan services. Includes fees paid for photocopies, costs of facsimile transmission, royalties and access fees paid to provide document delivery or interlibrary loan. Includes fees paid to bibliographic utilities if the portion paid for interlibrary loan can be separately counted. Does not include expenditures related to transactions between the main or central library and branches.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

6.3.8 Electronic Access Expenditures

All operating expenditures from the library budget associated with access to electronic materials and services. Include computer hardware and software used to support library operations, whether purchased or leased, mainframe and microcomputer. Includes expenditures for maintenance. Includes expenditures for services provided by national, regional, and local bibliographic utilities, networks, consortia and commercial services. Includes all fees and usage costs associated with such services as OCLC FirstSearch or electronic document delivery. Excludes capital expenditures.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

6.3.9 Electronic Materials Expenditures

Operating expenditures for electronic (digital) materials. Types of electronic materials include e-books, e-serials (including journals), government documents, databases (including locally mounted, full text or not), electronic files, reference tools, scores, maps, or pictures in electronic or digital format, including materials digitized by the library. Electronic materials can be distributed on magnetic tape, diskettes, computer software, CD-ROM, or other portable digital carrier, and can be accessed via a computer, via access to the Internet, or by using an e-book reader. Include equipment expenditures that are inseparably bundled into the price of the information service product; expenditures for materials held locally and for remote electronic materials for which permanent or temporary access rights have been acquired; and expenditures for database licenses.

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NOTE: Based on ISO 2789 and Federal-State Cooperative System (FSCS) definitions.

Source: library

Applicability: international, local, national

Library Type: academic, public, school, special, state

Aggregate: yes

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[ARL Statistics Questionnaire](#)

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[Public Libraries Survey](#)

6.3.10 Employee Benefit Expenditures

Expenditures for the benefits outside of salary and wages paid and accruing to an employee, regardless of whether the benefits or equivalent cash options are available to all staff members.

6.3.10.1.1 Direct, Paid Fringe Benefits

Includes Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, workmen's compensation, tuition, and housing benefits.

6.3.10.1.2 Indirect, Fringe Benefits

Includes time away from work usually allowed with pay, such as vacation, sick, or educational leave, and holidays, but in some instances without pay, such as family leave not considered sick leave.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

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[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

6.3.11 Furnishing and Equipment Expenditures

Expenditures for furnishings and equipment. Extraordinary, nonrecurring equipment expenditures are included in Capital Expenditures.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

6.3.12 Microform Material Expenditures

Expenditures for microforms. Microforms are photographic reproductions of textual, tabular, or graphic material reduced in size so that they can be used only with magnification. The two main types of

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microforms are micro reproductions on transparent material, including roll microfilm, aperture cards, microfiche, ultra fiche, and reproductions on opaque material.

Source: library

Applicability: international, local, national

Library Type: academic, public, school, special, state

Aggregate: yes

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[Public Libraries Survey](#)

[School Library Media Center Survey](#)

6.3.13 Other Operating Expenditures

Operating expenditures not included in any other subcategory of [6.2](#), *Operating Expenditures by Type of Expenditure*. (Also called Miscellaneous Expenditures.)

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

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[ARL Statistics Questionnaire](#)

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6.3.14 Preservation Expenditures

Expenditures for specific measures undertaken for the repair, maintenance, restoration, or protection of library materials, including but not limited to binding and rebinding, materials conversion (to microform for example), deacidification, and lamination.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

6.3.15 Professional Staff Salaries and Wages

All monies paid before deductions to all professional staff paid from library's budget (reporting unit's budget) for work performed. This definition excludes employee fringe benefits. Professional staff are staff members doing work that requires professional education (the master's degree or its equivalent) in the theoretical and scientific aspects of librarianship; also, in some libraries, staff performing professional level tasks who, though not librarians, have equivalent education and training in related fields (e.g., archives, computer sciences, business administration, education).

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

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[ARL Statistics Questionnaire](#)

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[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

6.3.16 Student Assistant Salaries and Wages

All monies paid before deductions to all student assistants paid from library's budget (reporting unit's budget) for work performed. This definition excludes employee fringe benefits.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

6.3.17 Support Staff Salaries and Wages

All monies paid before deductions to all support staff paid from library's budget (reporting unit's budget) for work performed. This definition excludes employee fringe benefits.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

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[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

6.4 Operating Income by Source

Money or money equivalents received in an accounting period and used for salaries and wages, the costs of library materials and services, and other operating expenditures.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

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[Public Libraries Survey](#)

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[State Library Agency Survey](#)

6.4.1 Federal Government Income

All federal government funds distributed to the library for expenditure by the library, including federal money distributed by the State.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

6.4.2 Local Government Income

Includes all tax and non-tax receipts designated by the community, district, or region and available for expenditure by the library. The value of any contributed or in-kind services or the value of any gifts and donations are excluded.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

6.4.3 Other Sources of Income

All income other than that included under local, state, and federal. Includes grants from non-profit organizations or corporations, donations from Friends as well as other donations, gifts, interest, fines, and fees. The value of any contributed services or the value of in-kind gifts and donations are excluded.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

6.4.4 State Government Income

All funds distributed to the library by State government for expenditure by the library, except for federal money distributed by the State. This includes funds from such sources as penal fines, license fees, and mineral rights.

Source: library

Applicability: international, local, national, state

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7 Services

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

7.1 Gate Count

The total number of persons who physically enter the library. The total number includes persons who visit in groups and persons who visit for library-sponsored programs. A person may be counted more than once. Counting may be done either upon entrance or upon exit.

Gate Count in a Typical Week – 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.

Typical Week – A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holidays, vacation periods, days when unusual events are taking place in the community or in the library. Choose a week in which the library is open regular hours.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.2 Hours Open

Number of hours when the main services are available to users during a normal week.

Hours Open in a Typical Week – Report an unduplicated count of hours a library facility or facilities are open in a typical week, including the main library and branches, using the following method. If a library is open from 9 a.m. to 5 p.m., Monday through Friday, it should report 40 hours per week. If several of its

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

branches are also open during those hours, the figure remains 40 hours per week. Should Branch A also be open one evening from 7:00 to 9:00, the total hours during which users can find service becomes 42. If Branch B is open the same hours on the same evening, the total remains 42, but if it is open two hours on another evening, or from 5:00 to 7:00 on the evening when Branch A is open later, the total becomes 44 hours during which users can find service. Collect service hours separately from hours a library facility is open.

Typical Week – A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holidays, vacation periods, days when unusual events are taking place in the community or in the library. Choose a week in which the library is open regular hours.

NOTE: Main services are primary services as defined by the library.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.2.1 Hours Open in Branch Libraries

Number of hours when the branch library services are available to users during a typical week.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.2.2 Hours Open in Main/Central Library

Number of hours when the main/central library services are available to users during a typical week.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.3 Information Requests

An information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral service.

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Information sources include:

1. Printed and nonprinted materials.
2. Machine-readable databases (including computer-assisted instruction).
3. The library's own catalogs and other holdings records.
4. Other libraries and institutions through communication or referral.
5. Persons both inside and outside the library.

When a staff member uses information gained from previous use of information sources to answer a question, the request is reported as an information request even if the source is not consulted again. (Also known as Reference Transaction.)

Reference Transactions in a Typical Week – Report the total number of reference transactions in a typical week. A reference transaction is an information contact that involves the knowledge, use, commendation, 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), catalogs and other holdings records, and, through communication or referral, other libraries and institutions, and persons both inside and outside the library. Include information and referral services. 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. Duration should not be an element in determining whether a transaction is a reference transaction.

Typical Week – A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holidays, vacation periods, days when unusual events are taking place in the community or in the library. Choose a week in which the library is open regular hours.

NOTE: It is essential that libraries do not include directional transactions in the report of reference transactions. A directional transaction is an information contact that does not involve knowledge, use, recommendation, interpretation, or instruction in the use of any information sources other than those that describe the library, such as schedules, floor plans, handbooks, and policy statements. Examples of directional transactions include giving instruction for locating, within the library, staff, library users, or physical features, and giving assistance of a non-bibliographical nature with machines.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.3.1 Virtual Reference Transactions

A virtual reference interaction is a question that is received and responded to in electronic format and conforms to reference interactions in that it is an information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Virtual reference interactions include e-mail, webform, chat, text messaging, instant messaging, or other network-based medium designed to support virtual reference.

NOTE: Includes questions either received or responded to.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[PLA Public Library Data Service Questionnaire](#)

7.4 Library Events/Programs

Events organized by the library. Number of exhibitions and number of events (including virtual events) typically with a literary or cultural intent.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

7.4.1 Attendance at Library Events

Total number of attendance at events as to type of events: exhibitions and other events; and as to types of users: children and adults.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.5 Library User

The library user is an individual accessing library materials and services from a variety of access points. Libraries may classify users in different ways, including but not limited to active borrower, registered library user, or eligible user. To adequately describe a library user, a distinction must be made between the library user status and eligibility to access or borrow from a library collection from inside or outside the physical premises of the library. The method of authenticating the status or eligibility of a library user is the responsibility of the individual library.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

7.6 Loans and Document Delivery

Direct lending or delivery transaction of an item in non-electronic form (e.g., book), of an electronic document on a physical carrier (e.g., CD-ROM) or other device (e.g., e-book reader), or transmission of an electronic document to one user for a limited time period (e.g., e-book).

Total Circulation – The total annual circulation of all library materials of all types, including renewals.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

NOTE 1: Count all materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users.

NOTE 2: Loans include user-initiated renewals as well as registered loans within the library (on-site loans). Renewals should be counted separately.

NOTE 3: Loans include copied documents supplied in place of original documents (including FAX) and print-outs of electronic documents made by library staff for the user.

NOTE 4: Loans of documents in physical form to distance users are included here.

NOTE 5: Mediated electronic transmission of documents is counted as electronic document delivery if their use is permitted for unlimited time. This includes transmissions to members of the population to be served.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[School Library Media Center Survey](#)

[State Library Agency Survey](#)

7.6.1 Electronic Document Delivery

Electronic transmission of a document or part of a document from the library collection to a user, mediated by library staff, not necessarily via another library.

NOTE 1: Electronic transmission of documents to members of the population to be served is included. FAX transmission is excluded.

NOTE 2: May be split up as to transmission with or without charge to the user.

Refer to [7.7.1, Use, Electronic Collections](#) for further information.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

7.6.2 External Document Supply

Document or part of it in print or electronic form delivered from outside the library collection by non-library suppliers (not through interlibrary lending) with the library being involved in the transaction and/or the payment.

NOTE 1: It is irrelevant whether a number of individual transactions are paid per view or a certain number of transactions have been prepaid.

NOTE 2: See [7.7.1, Use, Electronic Collections](#).

Source: vendor

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

7.6.3 Interlibrary Loan

Loan of a document in its physical form or delivery of a document (or part of it) in copied form, from one library to another library not under the same administration. See also 7.6.1, *Electronic Document Delivery*.

NOTE: Mediated transmission of documents in electronic form is counted as electronic document delivery.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[Public Libraries Survey](#)

[State Library Agency Survey](#)

7.6.3.1 Materials Obtained from Other Libraries

These are library materials, or copies of the materials, received by one library from another library upon request. The libraries involved in interlibrary loans are not under the same library administration.

7.6.3.2 Materials Provided to Other Libraries

These are library materials, or copies of the materials, provided by one library to another upon request. The libraries involved in interlibrary loans are not under the same library administration.

7.7 Use

In order to know how far electronic library services enlarge the range of library services and increase their market penetration, it is important to know the provenance of each use. Three locations should be differentiated:

- Inside the library
- Outside the library, but inside the institution or authority (population to be served)
- Outside the institution or authority (population to be served)

All data refer to the use of the library collection, the library's website, the OPAC and Internet access via the library—not to users—accessing documents on the Internet that are publicly available and free via the Internet access in the library.

Four core datasets have been identified which should, if possible, be collected for all services - separately for each service as well as summed for all services:

- **Number of sessions** – A session is defined as a successful request of a database or the OPAC. It is one cycle of user activities that typically starts when a user connects to a database or the OPAC and ends by terminating activity in the database or OPAC that is either explicit (by leaving the database through log-out or exit) or implicit (timeout due to user inactivity). (See ISO 2789, 3.3.21.)

NOTE: For multiple databases compiling several individual databases further information should be provided as to the separate databases hosted. In some cases (e.g. OPAC use inside the library), several users one after the other might make use of the same workstation, and sessions could not be separated. In most systems, a session is cut off after a specified time of non-use, thus avoiding part of the problem. The average timeout setting would be 30 minutes. If another timeout period is used this should be reported. Browser or proxy caching will be likely to reduce the number of requests registered in logfiles.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

- **Number of searches (queries)** – A search is defined as intending to represent a unique intellectual inquiry. Typically a search is recorded every time a search request is submitted to the server (see ISO 2789, 3.3.20). (Applies to licensed database services.)

NOTE: Mistyped search strings do not represent unique intellectual inquiries. In practice, however, libraries will have difficulties to differentiate these unintended searches from intended, but unsuccessful searches. Also, will need to exclude spider/crawler searches.

- **Number of units or descriptive records examined (including downloads)** – Number of full-content units examined, downloaded, or otherwise supplied to user, to the extent that these are recordable and controlled by the server rather than the browser (ICOLC Guidelines, September 2006). Viewing documents is defined as having the full text of a digital document or electronic resource downloaded, or any catalogue record or database entry fully displayed during a search. (ISO 2789, 3.3.3). Some electronic services (e.g., OPAC, reference database) do not typically require downloading as simply viewing documents (abstracts, titles) is normally sufficient for users' needs.

NOTE 1: Journal articles – by journal title with ISSN and title listed

NOTE 2: E-books – by book title with ISBN and title listed

NOTE 3: Reference materials – by content unit appropriate to the resource (e.g., dictionary definitions, encyclopedia articles, biographies, etc.)

NOTE 4: Non-textual resources – by file type as appropriate to resources (e.g., image, audio, video, etc.). (ICOLC Guidelines, September 2006)

NOTE 5: Documents viewed and downloading transactions can be compared to the following steps in the traditional use of open access collections: browsing at the shelves and taking documents to a working place or to the issue desk.

- **Number of virtual visits** – A virtual visit occurs when an external user connects to a networked library resource for any length of time or purpose (regardless of the number of pages or elements viewed). Examples of a networked library resource include a library OPAC or a library web page. In the case of a user visit to a library website, a user who looks at 16 pages and 54 graphic images registers one visit on the Web server.

In addition to these core datasets that provide basic information on the use of electronic services, some additional data have been found relevant and should be collected when possible and appropriate:

- **Number of rejected sessions (turnaways)** – A rejected session (turnaway) is defined as an unsuccessful log-in to an electronic service by exceeding the simultaneous user limit. (See ISO 2789, 3.3.17.)

NOTE: Failure of log-in because of wrong passwords is excluded. The number of sessions exceeding the simultaneous user limit cannot always be differentiated from other rejections (e.g., missing or mistyped passwords).

- **Number of menu selections** – Number of user initiated searches through the use of alphabetic and subject menu selections. (ICOLC)

NOTE: Categorized as appropriate for the vendor systems, if display data can be accomplished by browsing (e.g., the use of menus).

Table 1 shows the data on use of the library's electronic services that are considered necessary and useful for collection by libraries.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Table 1: Electronic Services for Collection by Libraries

	From inside the library	From elsewhere inside the institution	From outside the institution
Number of sessions, OPAC	X	X	X
Number of sessions, commercial services	X	X	X
Number of rejected sessions (turnaway)	X	X	X
Number of searches (queries), library collection	X	X	X
Number of searches (queries), commercial services	X	X	X
Number of searches (queries), OPAC	X	X	X
Number of units/records examined, library collection full-content units	X	X	X
Number of units/records examined, commercial services full-content units	X	X	X
Number of units/records examined, library collection descriptive records	X	X	X
Number of units/records examined, commercial services descriptive records	X	X	X
Number of units/records examined, OPAC descriptive records	X	X	X
Number of virtual visits		X	X
Number of menu selections		X	X
Number of virtual reference transactions	X	X	X

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

7.7.1 Electronic Collection

7.7.1.1 Units/Records Examined

Content in the electronic collection that is delivered to a user. The sub-categories that follow provide for a detailed breakdown by type of content delivered (full-content unit, or descriptive record) and system delivering the content (Library Collection, Commercial Service or OPAC). See [7.6](#), *Loans and Document Delivery*.

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

7.7.1.1.1 Commercial Services Full-Content Units Examined

Number of subscription service full-content units examined, downloaded, or otherwise supplied to user, to the extent that these are recordable and controlled by the server rather than the browser. (ICOLC Guidelines, September 2006).

Count the number of views to each vendor subscription (OCLC, Gale, etc.) to which the library subscribes. A view is defined as the number of full text articles/pages, abstracts, citations, and text only or text/graphics viewed.

NOTE 1: Journal articles by journal title with ISSN and title listed.

NOTE 2: e-books by book title with ISBN and title listed.

NOTE 3: Reference materials by content unit appropriate to the resource (e.g., dictionary definitions, encyclopedia articles, biographies, etc.).

NOTE 4: Non-textual resources by file type as appropriate to resources (e.g., image, audio, video, etc.). (ICOLC Guidelines, September 2006)

7.7.1.1.2 Library Collection Full-Content Units Examined

Number of full-content units from library electronic collection examined, downloaded, or otherwise supplied to a user. Exclude OPAC or commercial services (i.e., online databases).

7.7.1.1.3 OPAC Descriptive Records Examined

Number of descriptive records from the library's online catalog delivered to a user. Exclude commercial services or library collection descriptive records (i.e., library website services and collections).

7.7.1.2 Searches/Menu Selections (Queries)

A search is defined as intending to represent a unique intellectual inquiry whether conducted through a search form submitted to the server or through the use of menu selections (e.g., browsing a list of subjects.)

[ARL Statistics Questionnaire](#)

7.7.1.2.1 Database Searches (Queries)

Total count of the number of searches conducted in the library's online databases. A search is defined as intending to represent a unique intellectual inquiry. Typically a search is recorded every time a search request is submitted to the server. Subsequent activities by users (e.g., browsing, printing) are not considered part of the search process. It is recommended to consult the Project Counter definitions and to check with your database vendor for these data. Mistyped search strings do not represent unique intellectual inquiries. Include menu selection searches. Exclude spider/crawler searches. (ISO 2789, Annex A)

7.7.1.2.2 Library Collection Searches (Queries)

A search is defined as intending to represent a unique intellectual inquiry. Typically a search is recorded every time a search request is submitted to the server. Limited to library electronic collection services. Include menu selection searches. Exclude spider/crawler searches. Excludes OPAC searches. (ISO 2789, Annex A)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

7.7.1.2.3 OPAC Searches (Queries)

A search is defined as intending to represent a unique intellectual inquiry. Typically a search is recorded every time a search request is submitted to the server. Limited to the library online catalog service. Include menu selection searches. Exclude spider/crawler searches. (ISO 2789, Annex A)

7.7.1.3 Rejected Sessions (Turnaways)

A rejected session (turnaway) is defined as an unsuccessful log-in to an electronic service by exceeding the simultaneous user limit. (ISO 2789, Annex A) Excludes failure of log-in because of wrong passwords.

7.7.1.4 Virtual Visits

A user's request of the library website from outside the library premises regardless of the number of pages or items viewed. (ISO 2789, 3.3.25) Excludes website visits from within the library.

NOTE: This statistic is the equivalent of a session to the library's website. As such, there is a need to exclude various counts (hits, downloads) by users during any given visit.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

[PLA Public Library Data Service Questionnaire](#)

[State Library Agency Survey](#)

7.7.2 In House Use

Documents taken by a user from open access stock for use on the premises.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[PLA Public Library Data Service Questionnaire](#)

7.7.3 Internet Access

Internet access by a user from a workstation provided on the library premises or remotely.

NOTE: This will usually be the period of time between a log-in and an implicit or explicit log-off from a library Internet portal, database or the OPAC.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Public Libraries Survey](#)

[State Library Agency Survey](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

7.7.4 Number of Public Access Workstation Users

Annual count of the number of users of all of the library's graphical public access workstations connected to the Internet computed from a one-week sample. (Branch Level Statistic)

NOTE 1: Select a one-week period during the test period. One week equals the number of hours the library is open over a consecutive seven-day period.

NOTE 2: Data may be collected for more than one week and averaged but report this change in procedure when submitting the data to the project website.

Count each user that uses the graphical public access workstations connected to the Internet, regardless of the amount of time spent on the computer. A user who uses the library's workstations three times a week would count as three users in the count. Internet use includes all types of usage including WWW, e-mail, telnet, chat, etc. The study team recognizes the potential difficulty of determining whether a user on a multi-purpose (CD-ROM access, word processing, etc.) workstation is using the Internet. Do not include staff use of these workstations.

Obtain a total figure of users for the week (or an average weekly use figure if you counted users over a two-week period) and report that number for each participating branch, if applicable. If you collect the user data over a two-week period, for example during the first week 70 users were counted, 80 users were counted the second week, the average number of users would be 75 (obtained and reported by adding week one's users to week two's [70 + 80 = 150] and dividing by the number of weeks surveyed [150 / 2 = 75]).

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

7.8 User Orientation and Training

Hours of user training undertaken by the library, either in orientation of collections, services and facilities or on the use of information sources. Hours of user training on electronic services undertaken by the library. Numbers of hours users have accessed web-based training services offered by the library.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

7.8.1 Attendance at User Training

Number of attendees at user training sessions and number of attendees at user training lessons on electronic services.

Source: library

Applicability: international, local, national, state

Library Type: academic, cooperative, network, public, school, special, state

Aggregate: yes

[ARL Statistics Questionnaire](#)

7.8.2 Formal User Information Technology Training

A count of the number of users instructed and the hours of instruction offered in the use of information technology or resources obtainable using information technology in structured sessions - either delivered

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

in the library using a computer lab or other instructional setting or delivered electronically through online-based instruction.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special

Aggregate: yes

7.8.3 Information Services to Groups

Information contacts planned in advance in which a staff member, or a person invited by a staff member, provides information intended for a number of persons. Information service to groups may be either bibliographic instruction or library use presentations, or it may be cultural, recreational, or educational presentations. Story hours are included. Presentations both on and off the library premises are included as long as the library sponsors them. Meetings sponsored by other groups using library meeting rooms are not included.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

[Academic Library Survey](#)

[ARL Statistics Questionnaire](#)

7.8.4 Point-of-Use Information Technology Training

A count of the number of users instructed and the hours of instruction offered in the use of information technology or resources obtainable using information technology in unstructured sessions at the impromptu request of users.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

7.8.5 User Training

Training programs set up with a specified lesson plan that aims at specific learning outcomes for the use of library services.

NOTE 1: User training can be offered as a tour of the library, as library instruction, or as a web-based service for users.

NOTE 2: The duration of lessons is irrelevant.

Source: library

Applicability: international, local, national, state

Library Type: academic, public, school, special, state

Aggregate: yes

Appendix A (normative): Survey Information

Following are the principal national library surveys in the U.S. that have been referenced in this standard. Note that the surveys listed after the individual data elements collected that data element at some point, but they may not necessarily be collecting it at the present time. Links for surveys lead the user to the main page for the survey series, which link to historical surveys as well as the current survey.

ARL Statistics Questionnaire

Date: **Version:** **Frequency:** Annual

Sponsor: Association of Research Libraries

Survey Website: <http://www.arl.org/stats/annualsurveys/arlstats/>

ASCLA Library Networks, Cooperatives and Consortia Database

Date: **Version:** **Frequency:** Annual

Sponsor: ALA Office for Research & Statistics (ORS) in collaboration with the Association of Specialized and Cooperative Agencies (ASCLA)

Survey Website: <http://cs.ala.org/ra/lncc/>

Academic Library Survey

Date: **Version:** **Frequency:** Biennial

Sponsor: National Center for Education Statistics

Survey Website: <http://nces.ed.gov/surveys/libraries/academic.asp>

Public Libraries Survey

Date: **Version:** **Frequency:** Annual

Sponsor: Institute of Museum and Library Services

Survey Website: http://www.imls.gov/research/public_libraries_in_the_united_states_survey.aspx

PLA Public Library Data Service Questionnaire

Date: **Version:** **Frequency:** Annual

Sponsor: American Library Association/Public Library Association

Survey Website: <http://www.ala.org/pla/publications/plds>

School Library Media Center Survey

Date: **Version:** **Frequency:** Four-five year cycle

Sponsor: National Center for Education Statistics

Survey Website: <http://nces.ed.gov/surveys/SASS/questionnaire.asp>

State Library Agency Survey

Date: **Version:** **Frequency:** Annual from 1994-2010; Biennial from 2012-

Sponsor: Institute of Museum and Library Services

Survey Website: http://www.imls.gov/research/state_library_agency_survey.aspx

Appendix B (informative): E-metrics Elements

(This appendix is not part of *Information Services and Use: Metrics and Statistics for Libraries and Information Providers – Data Dictionary*, ANSI/NISO Z39.7-2013. It is included for information only.)

The following sections of the standard address metrics related to electronic resources or information.

- 4.3.5 E-books
- 4.3.6 Current Serials Received
 - 4.3.6.1 Current Serial Titles
 - 4.3.6.2 Current Subscriptions
 - 4.3.6.2.1 Electronic/Digital Subscriptions
- 4.8 Other Materials
 - 4.8.1 Computer Files
 - 4.8.2 Databases
 - 4.8.3 Digital Documents
 - 4.8.4 Free Internet Resources
 - 4.8.5 Other Digital Documents
- 5.6 Workstations
 - 5.6.1 Available Internet Workstations
 - 5.6.2 Available Workstations
- 6.3 Operating Expenditures by Type of Expenditure
 - 6.3.2 Bibliographic Utilities, Networks and Consortia Expenditures
 - 6.3.5 Computer Hardware, Software, Supplies and Maintenance Expenditures
 - 6.3.6 Current Serial Expenditures
 - 6.3.7 Document Delivery/Interlibrary Loan Expenditures
 - 6.3.8 Electronic Access Expenditures
 - 6.3.9 Electronic Materials Expenditures
 - 6.3.11 Furnishing and Equipment Expenditures
 - 6.3.14 Preservation Expenditures
- 7.3 Information Requests
 - 7.3.1 Virtual Reference Transactions
- 7.6 Loans and Document Delivery
 - 7.6.1 Electronic Document Delivery
 - 7.6.2 External Document Supply
- 7.7 Use
 - 7.7.1 Electronic Collection
 - 7.7.3 Internet Access
 - 7.7.4 Number of Public Access Workstation Users
 - 7.8 User Orientation and Training
 - 7.8.1 Attendance at User Training
 - 7.8.2 Formal User Information Technology Training
 - 7.8.4 Point-of-Use Information Technology Training

Appendix C
(informative):
Additional Resources for Library Metrics

(This appendix is not part of Information Services and Use: Metrics and Statistics for Libraries and Information Providers – Data Dictionary, ANSI/NISO Z39.7-2013. It is included for information only.)

The Z39.7 Standing Committee provides additional resources related to Library Metrics on the committee webpage (www.niso.org/workrooms/z39-7).

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ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Index

(This index is not part of *Information Services and Use: Metrics and Statistics for Libraries and Information Providers – Data Dictionary*, ANSI/NISO Z39.7-2013. It is included for information only.)

- Abstract and indexing databases, [4.8.2.1](#)
- Academic libraries as part of network and cooperative target population, [2.2.2.1](#)
- Academic library, [2.1.1](#)
- Academic library target population, [2.2.1](#)
- Access, electronic, expenditures, [6.3.8](#)
- Access rights, [4](#), [4.8](#)
- Acquisitions, [4](#)
- Addition (acquisitions), [4](#)
- Administrative unit, [2.1.2](#)
- Aggregated full text databases, [4.8.2.2](#)
- Anglo-American Cataloguing Rules*, [1.5](#)
- Aperture cards, [4.7](#), [6.3.12](#)
- Application [of standard], [1.3](#)
- Archives and manuscripts, [4.1](#)
- Art, [4.6](#)
- Assistants, student, [3.7](#)
- Attendance at library events, [7.4.1](#)
- Attendance at user training, [7.8.1](#)
- Audiotapes, [4.2](#), [6.3.1](#)
- Audiovisual materials, [4.2](#)
- Audiovisual materials additions – units, [4.2.1](#)
- Audiovisual materials additions – titles, [4.2.2](#)
- Audiovisual materials expenditures, [6.3.1](#)
- Audiovisual materials holdings – units, [4.2.3](#)
- Audiovisual materials holdings – titles, [4.2.4](#)
- Available internet workstations, [5.6.1](#)
- Available workstations, [5.6.2](#)
- Benefit, employee, expenditures, [6.3.10](#)
- Benefits, fringe, direct paid, [6.3.10.1.1](#)
- Benefits, fringe, indirect, [6.3.10.1.2](#)
- Bibliographic utilities, networks, and consortia expenditures, [6.3.2](#)
- Binding expenditures, [6.3.14](#)
- Blind and physically handicapped individuals, [2.2.6.1](#)
- Book, [4.3](#), [6.3.3](#)
- Book and serial backfile expenditures, [6.3.3](#)
- Bookmobile, [2.1.3](#), [5.4](#)
- Books and serials, [4.3](#)
- Books and serials additions – units, [4.3.1](#)
- Books and serials additions – titles, [4.3.2](#)
- Books and serials holdings – titles, [4.3.3](#)
- Books and serials holdings – volumes, [4.3.4](#)
- Braille documents, [4.8](#)
- Branch library, [2.1.4](#)
- Branch libraries, hours open, [7.2.1](#)
- Capital expenditures, [6.1](#)
- Capital revenue, federal government, [6.2.1](#)
- Capital revenue, local government, [6.2.2](#)
- Capital revenue, other sources, [6.2.3](#)
- Capital revenue, state government, [6.2.4](#)
- Capital revenue by source, [6.2](#)
- Carrels, [5.5](#)
- Cartographic materials, [4.4](#)
- Cartographic materials, digital, [4.8.5](#)
- Cartographic materials additions – units, [4.4.1](#)
- Cartographic materials holdings – units, [4.4.2](#)
- Cassettes, audio, [4.2](#), [6.3.1](#)
- CD-ROMs, [4.8.1](#)
- Central library, hours open, [7.2.2](#)
- Certified library media specialist, [3.1](#)
- Charts, [4.4](#), [4.6](#)
- Circulation, total, [7.6](#)
- Collection expenditures, [6.3.4](#)
- Collection resource categories, [1.5](#)
- Collections, [4](#)
- Commercial library, [2.1.7](#)
- Commercial services full content units examined, [7.7.1.1.1](#)
- Compact discs, audio, [4.2](#), [6.3.1](#)
- Computer files, [4.8.1](#)
- Computer hardware, software, supplies, and maintenance expenditures, [6.3.5](#)
- Computer workstations, [5.6](#)
- Consortia, bibliographic utilities, and network expenditures, [6.3.2](#)
- Contributed services staff, [3.2](#)
- Conversion expenditures, [6.3.14](#)
- Cooperative target population, [2.2.2](#)
- Cubic feet, [4.1.1](#)
- Current serial expenditures, [6.3.6](#)
- Current serial titles, [4.3.6.1](#)
- Current serials received, [4.3.6](#)
- Current subscriptions, [4.3.6.2](#)
- Data categories, [1.5](#)
- Database searches (queries), [7.7.1.2.1](#)
- Databases, [4.8.2](#)
- Descriptive records examined (including downloads), [7.7](#)
- Digital audio recordings, [4.2](#), [6.3.1](#)
- Digital documents, [4.8.3](#)
- Digital documents, other, [4.8.5](#)
- Digital materials expenditures, [6.3.9](#)
- Digital serial titles, [4.3.6.1.1](#)
- Digital subscriptions, [4.3.6.2.1](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

- Digital unit, [4](#)
- Dioramas, [4.8](#)
- Directional transaction, [7.3](#)
- Disks, computer, [4.8.1](#)
- Document delivery, electronic, [7.6.1](#)
- Document delivery and loans, [7.6](#)
- Document delivery/interlibrary loan expenditures, [6.3.7](#)
- Document supply, external, [7.6.2](#)
- Documents, [4](#)
- Documents, digital, [4.8.3](#)
- Documents, digital, other, [4.8.5](#)
- Downloads (descriptive records examined), [7.7](#)
- E-books, [4.3.5](#)
- E-metrics elements, [Appendix B](#)
- Electronic access expenditures, [6.3.8](#)
- Electronic collection, [4.8](#)
- Electronic collection, use, [7.7.1.1](#)
- Electronic/digital serial titles, [4.3.6.1.1](#)
- Electronic/digital subscriptions, [4.3.6.2.1](#), [6.6.6.1](#)
- Electronic/digital unit, [4](#)
- Electronic document delivery, [7.6.1](#)
- Electronic materials, other, [4.8](#)
- Electronic materials expenditures, [6.3.9](#)
- Employee benefit expenditures, [6.3.10](#)
- Employees, salaries and wages, [6.3.15](#), [6.3.16](#), [6.3.17](#)
- Equipment and furnishing expenditures, [6.3.11](#)
- Events, usable area, [5.3](#)
- Events/programs, library, [7.4](#)
- Events/programs, library, attendance at, [7.4.1](#)
- Exhibits, digital, [4.8.5](#)
- Expenditures, [6](#)
- Expenditures, audiovisual materials, [6.3.1](#)
- Expenditures, operating, by type of expenditure, [6.3](#)
- External document supply, [7.6.2](#)
- Facilities, [5.4](#)
- Facilities, mobile, [5.4.1](#)
- Facilities, physical, [5.4.2](#)
- Faculty, part-time, [2.2.1.2](#)
- Faculty, full-time, [2.2.1.1](#)
- Federal government capital revenue, [6.2.1](#)
- Federal government income, [6.4.1](#)
- Files, computer, [4.8.1](#)
- Filmstrips, [4.6](#)
- Finances, [6](#)
- Fixed asset expenditures, [6](#)
- Formal user information technology training, [7.8.2](#)
- Format [of standard], [1.4](#)
- Free internet resources, [4.8.4](#)
- Fringe benefits, direct paid, [6.3.10.1.1](#)
- Fringe benefits, indirect, [6.3.10.1.2](#)
- Full text databases, [4.8.2.2](#)
- Full-content units, commercial services, examined, [7.7.1.1.1](#)
- Full-content units, library collection, examined, [7.7.1.1.2](#)
- Full time equivalent employees (FTE), [3](#)
- Furnishing and equipment expenditures, [6.3.11](#)
- Games, [4.8](#)
- Gate count, [7.1](#)
- General principles, [1.5](#)
- General public, [2.2.6.2](#)
- Government documents, [4.5](#)
- Government documents additions – units, [4.5.1](#)
- Government documents holdings – titles, [4.5.2](#)
- Government library, [2.1.5](#)
- Graphic materials, [4.6](#), [6.3.1](#)
- Graphic materials additions – units, [4.6.1](#)
- Graphic materials holdings – units, [4.6.2](#)
- Gross measured area, [5.1](#)
- Groups, information services to, [7.8.3](#)
- Hardware, computer, expenditures, [6.3.5](#)
- Health services/medical library, [2.1.6](#)
- Holdings, [4](#)
- Hours of training, staff, [3.6.2](#)
- Hours open, [7.2](#)
- Hours open in branch libraries, [7.2.1](#)
- Hours open in main/central library, [7.2.2](#)
- Human resources, [3](#)
- In house use, [7.7.2](#)
- Income, [6](#)
- Income, federal government, [6.4.1](#)
- Income, local government, [6.4.2](#)
- Income, other sources, [6.4.3](#)
- Income, operating, by source, [6.4](#)
- Income, state government, [6.4.4](#)
- Indexing (and abstract) databases, [4.8.2.1](#)
- Industrial/commercial library, [2.1.7](#)
- Information requests, [7.3](#)
- Information services to groups, [7.8.3](#)
- Information technology training, point-of-use, [7.8.4](#)
- Information technology training, user, [7.8.2](#)
- Infrastructure, [5](#)
- Interlibrary loan, [7.6.3](#)
- Interlibrary loan/document delivery expenditures, [6.3.7](#)
- Internet access, [7.7.3](#)
- Internet resources, free, [4.8.4](#)
- Internet workstations, [5.6.1](#)
- Law library, [2.1.8](#)
- Legal service area, [2.2.3](#)
- Library collection full-content units examined, [7.7.1.1.2](#)
- Library collection searches (queries), [7.7.1.2.2](#)
- Library cooperative, [2.1.9](#)
- Library events/programs, [7.4](#)
- Library events/programs, attendance at, [7.4.1](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

- Library facilities, [5.4](#)
- Library media specialist, certified, [3.1](#)
- Library operations, usable area, [5.3](#)
- Library space, [5.1](#), [5.2](#), [5.3](#)
- Library types, [1.5](#)
- Library user, [7.5](#)
- Linear feet added, [4.1.2](#)
- Linear feet held, [4.1.3](#)
- Loans and document delivery, [7.6](#)
- Local government capital revenue, [6.2.2](#)
- Local government income, [6.4.2](#)
- Machine-readable files, [4.8.1](#)
- Main library, [2.1.10](#)
- Main library, hours open, [7.2.2](#)
- Maintenance, computer hardware and software, expenditures, [6.3.5](#)
- Manuscripts, [4.1](#)
- Maps, [4.4](#)
- Maps, digital, [4.8.5](#)
- MARC 21 Format for Bibliographic Data*, [1.5](#)
- Materials, electronic, expenditures, [6.3.9](#)
- Materials, other – print and electronic, [4.8](#)
- Materials additions, other – units, [4.8.6](#)
- Materials holdings, other – units, [4.8.7](#)
- Materials held, [4](#)
- Materials obtained from other libraries, [7.6.3.1](#)
- Materials provided to other libraries, [7.6.3.2](#)
- Materials repair and restoration expenditures, [6.3.14](#)
- Materials storage, usable area, [5.3](#)
- Measured area, gross, [5.1](#)
- Media center, [2.1.13](#)
- Media center as part of network and cooperative target population, [2.2.2.3](#)
- Media center target population, [2.2.4](#)
- Menu selections, number of, [7.7](#)
- Menu selections/searches (queries), [7.7.1.2](#)
- Medical library, [2.1.6](#)
- Metatags [used in standard], [1.5](#)
- Microfiche, [4.7](#), [6.3.12](#)
- Microfilm, [4.7](#), [6.3.12](#)
- Microfilm subscriptions, [4.3.6.2.2](#)
- Microform material expenditures, [6.3.12](#)
- Microform serial titles, [4.3.6.1.2](#)
- Microforms, [4.7](#)
- Microforms, serial, expenditures, [6.6.6.1](#)
- Microforms additions – units, [4.7.1](#)
- Microforms holdings – units, [4.7.2](#)
- Miscellaneous expenditures, [6.3.13](#)
- Mobile facilities, [5.4.1](#)
- Motion pictures, [4.2](#), [6.3.1](#)
- Multimedia documents, [4.8](#)
- Music, printed, [4.8](#)
- Music documents, digital, [4.8.5](#)
- National library, [2.1.11](#)
- Net usable area, [5.2](#)
- Net usable area by function, [5.3](#)
- Network and cooperative target population, [2.2.2](#)
- Networks, consortia, and bibliographic utilities expenditures, [6.3.2](#)
- Number of menu selections, [7.7](#)
- Number of public access workstation users, [7.7.4](#)
- Number of rejected sessions (turnaways), [7.7](#)
- Number of searches (queries), [7.7](#)
- Number of sessions, [7.7](#)
- Number of staff trained, [3.6.1](#)
- Number of units or descriptive records examined (including downloads), [7.7](#)
- Number of virtual visits, [7.7](#)
- OPAC descriptive units examined, [7.7.1.1.3](#)
- OPAC searches (queries), [7.7.1.2.3](#)
- Operating expenditures, other, [6.3.13](#)
- Operating expenditures by type of expenditure, [6.3](#)
- Operating income by source, [6.4](#)
- Orientation, user, [7.8](#)
- Other digital documents, [4.8.5](#)
- Other materials, [4.8](#)
- Other materials additions – units, [4.8.6](#)
- Other materials holdings – units, [4.8.7](#)
- Other materials – electronic, [4.8](#)
- Other materials, – print, [4.8](#)
- Other operating expenditures, [6.3.13](#)
- Other sources of capital revenue, [6.2.3](#)
- Other sources of income, [6.4.3](#)
- Other staff, [3.3](#)
- Patents, [4.8](#)
- Photographs, [4.6](#)
- Physical facilities, [5.4.2](#)
- Physically handicapped individuals, [2.2.6.1](#)
- Pictures, [4.6](#)
- Point-of-use information technology training, [7.8.4](#)
- Posters, [4.6](#)
- Preservation expenditures, [6.3.14](#)
- Primary target population, [2](#), [2.2](#)
- Principles, general [of standard] [1.5](#)
- Print materials, [4.3](#), [4.8](#), [6.3.3](#)
- Print/microfilm subscriptions, [4.3.6.2.2](#)
- Print/microform serial titles, [4.3.6.1.2](#)
- Printed music, [4.8](#)
- Professional staff, [3.4](#)
- Professional staff salaries and wages, [6.3.15](#)
- Programs/events, library, [7.4](#)
- Programs/events, library, attendance at, [7.4.1](#)
- Public access workstation users, [7.7.4](#)
- Public access workstations, [5.6](#)
- Public libraries as part of network and cooperative target population, [2.2.2.2](#)
- Public library, [2.1.12](#)
- Public library target population, [2.2.3](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

- Purpose [of standard], [1.2](#)
Qualified specialist staff, [3.5](#)
Queries, database searches, [7.7.1.2.1](#)
Queries, library collection searches, [7.7.1.2.2](#)
Queries, OPAC searches, [7.7.1.2.3](#)
Queries, searches/menu selections, [7.7.1.2](#)
Radiographs, [4.6](#)
Realia, [4.2](#), [6.3.1](#)
Records (sound), [4.2](#), [6.3.1](#)
Records (electronic), examined, [7.7.1.1](#)
Reference transaction, [7.3](#)
Reference transaction, virtual, [7.3.1](#)
Referral services, [7.3](#)
Rejected sessions (turnaways), [7.7](#), [7.7.1.3](#)
Report, digital, [4.8.5](#)
Reporting unit, [2](#), [2.1](#)
Reporting unit and primary target population, [2](#)
Revenue, [6](#)
Revenue, capital, federal government, [6.2.1](#)
Revenue, capital, by source, [6.2](#)
Roll microfilm, [4.7](#), [6.3.12](#)
Salaries and wages, professional staff, [6.3.15](#)
Salaries and wages, student assistant, [6.3.16](#)
Salaries and wages, support staff, [6.3.17](#)
School library media center, [2.1.13](#)
School library media center as part of network and cooperative target population, [2.2.2.3](#)
School library media center target population, [2.2.4](#)
Scope [of standard], [1.1](#)
Searches (queries), database, [7.7.1.2.2](#)
Searches (queries), number of, [7.7](#)
Searches (queries), OPAC, [7.7.1.2.3](#)
Searches/menu selections (queries), [7.7.1.2](#)
Seating capacity, [5.5](#)
Serial, [4.3](#), [6.3.3](#)
Serial expenditures, current, [6.3.6](#)
Serial expenditures, current, electronic, [6.6.6.1](#)
Serial expenditures, current, paper and microform, [6.6.6.2](#)
Serial titles, current, [4.3.6.1](#)
Serial titles, electronic/digital, [4.3.6.1.1](#)
Serial titles, print/microform, [4.3.6.1.2](#)
Serials, books and, [4.3](#)
Serials, books and, additions – units, [4.3.1](#)
Serials, books and, additions – titles, [4.3.2](#)
Serials, books and, backfile expenditures, [6.3.2](#)
Serials, books and, holdings – titles, [4.3.3](#)
Serials, books and, holdings – volumes, [4.3.4](#)
Serials received, current, [4.3.6](#)
Services, [7](#)
Sessions, number of, [7.7](#)
Sessions, rejected (turnaways), number of, [7.7](#)
Slides, [4.2](#), [4.6](#), [6.3.1](#)
Software expenditures, [6.3.5](#)
Sound reproduction materials, [4.2](#), [6.3.1](#)
Space, library, [5.1](#), [5.2](#), [5.3](#)
Special libraries as part of network and cooperative target population, [2.2.2.4](#)
Special library, [2.1.14](#)
Special library target population, [2.2.5](#)
Staff, other, [3.3](#)
Staff, professional, [3.4](#)
Staff, salaries and wages, [6.3.15](#), [6.3.16](#), [6.3.17](#)
Staff, qualified specialist, [3.5](#)
Staff hours of training, [3.6.2](#)
Staff trained, number of, [3.6.1](#)
Staff training, [3.6](#)
State correctional institutions, residents, [2.2.6.4](#)
State government employees, [2.2.6.5](#)
State government capital revenue, [6.2.4](#)
State government income, [6.4.4](#)
State institution residents, other, [2.2.6.3](#)
State library agency, [2.1.15](#)
State library agency target population, [2.2.6](#)
Story hours, [7.8.3](#)
Student assistant salaries and wages, [6.3.16](#)
Student assistants, [3.7](#)
Students, part-time, [2.2.1.4](#), [2.2.1.6](#)
Students, full-time, [2.2.1.3](#), [2.2.1.5](#)
Subscriptions, current, [4.3.6.2](#)
Subscriptions, electronic/digital, [4.3.6.2.1](#)
Subscriptions, expenditures, [6.3.6](#)
Subscriptions, print/microfilm, [4.3.6.2.2](#)
Supplies, computer, expenditures, [6.3.5](#)
Support staff salaries and wages, [6.3.17](#)
Survey information, [Appendix A](#)
Tapes, audio, [4.2](#), [6.3.1](#)
Tapes, computer, [4.8.1](#)
Target population, [2](#), [2.2](#)
Technology, library, [5](#)
Three-dimensional artifacts, [4.2](#), [6.3.1](#)
Three-dimensional objects, [4.8](#)
Title, [4](#)
Total circulation, [7.6](#)
Toys, [4.8](#)
Training, point-of-use information technology, [7.8.4](#)
Training, staff, [3.6](#)
Training, user, [7.8](#)
Training, user, information technology, [7.8.2](#)
Training, user, attendance at, [7.8.1](#)
Transparencies, [4.2](#), [4.6](#), [6.3.1](#)
Turnaways, [7.7](#), [7.7.1.3](#)
Typical week, [7.1](#), [7.2](#), [7.3](#)
Ultrafiche, [4.7](#), [6.3.12](#)
Unit [of materials], [4](#)
Unit, reporting, [2](#)
Units/records (electronic) examined, [7.7.1.1](#)
Units or descriptive records examined (including downloads), number of, [7.7](#)
Usable area, net, [5.2](#)

ANSI/NISO Z39.7-2013, Information Services and Use: Metrics and Statistics for Libraries and Information Providers — Data Dictionary

Usable area, net, by function, [5.3](#)
Use, [7.7](#)
User, library, [7.5](#)
User information technology training, formal, [7.8.2](#)
User orientation and training, [7.8](#)
User services, usable area, [5.3](#)
User training, [7.8.5](#)
User training, attendance at, [7.8.1](#)
Using the library statistics data dictionary, [1.6](#)
Utilities, bibliographic, networks and consortia expenditures, [6.3.2](#)

Video recordings, [4.2](#), [6.3.1](#)
Virtual reference transactions, [7.3.1](#)
Virtual visits, [7.7](#), [7.7.1.4](#)
Visits, virtual, [7.7](#), [7.7.1.4](#)
Volume, [4](#)
Volunteers, [3.8](#)
Withdrawal, [4](#)
Workstations, [5.6](#)
Workstations, public access, users, [7.7.4](#)