COUNCIL OF POST-SECONDARY LIBRARY DIRECTORS B.C.
LIBRARY/LEARNING RESOURCE CENTRE SURVEY

DEFINITIONS (Revised June 9, 2017)

INTRODUCTION
This annual statistical survey is intended to provide a picture of the holdings and activities of Libraries in colleges, university/colleges, institutes, and universities of British Columbia for the fiscal year (April 1 - March 31). All information is based on the total count for one year.

The following activity, although under library jurisdiction in many institutions, is excluded from this report:
- audio-visual equipment distribution to classrooms
- audio-visual equipment maintenance
- Media production or instructional media services.

A word of caution:
Comparison among institutions should be made with the understanding that each library operates somewhat differently and counts activities within a context unique to the institution. In addition, as access to electronic information becomes more important, holdings information is not always readily quantifiable or entirely meaningful and expenditure information is not found within the same budget categories in each institutional library.

Note: Do not add text into any field that will be totalled automatically as this will prevent the system from performing this addition.

Note: use the "Explanatory Notes" section at the bottom of the survey to provide additional information or any variations from the norm.

1. TYPE OF LIBRARY
   Self explanatory.

2. NUMBER OF CAMPUSES
   Differentiate between those centres which have library staffing from those which are characterized as reading rooms and/or learning centres which have no staff or may have staff paid for by other parts of the institution.
   a. Number of campuses with library staff
   b. Number of campuses without library staff

3. USERS
   FTE students: for sections a - f, this data will be completed for you based on data supplied by the Ministry of Advanced Education
   g. FTE faculty:
      • Provide FTE (not head count) of faculty employees (include librarians if applicable); approximate if actual number is not available.
Community Borrower Fee:
- do not include the number of community borrowers as this figure does not represent active users for many institutions; provide only the annual fee if applicable.

h. Is there a community borrowers fee?
  i. $$ amount

4. LIBRARY PERSONNEL
- count all personnel in FTE terms (not head-counts).

a. FTE librarians:
- include all part-time and contract librarian hours;
- include Library Director whether this is an administrative position or not;
- include any positions funded by special grants.

b. FTE library staff:
- exclude personnel who are entirely devoted to AV equipment and media production/IMS activities.

c. FTE other professionals:
- include staff members who are not librarians in the strict sense of the terms such as computer experts, systems analysts or budget officers.

d. Subtotal – FTE Library Personnel: (system will total automatically)
- provide subtotal of personnel before counting student aides and work-study employees.

e. FTE student aides:
- include student aides and work-study employees.

f. Total FTE Library Personnel: (system will total automatically)

5.1. COLLECTIONS - PHYSICAL
- Volumes: items that are barcoded separately or intended to be circulated as one unit, (e.g. a 20-volume set of encyclopedias = 20 units, 2 CDs plus booklet in one package = 1 unit; book plus CD = 1 unit; set of slides in a binder or a folio = 1 unit).

a. Monographs:
- a volume is a physical unit of any printed or processed work contained in one binding, encasement or other clear distinction, which has been catalogued as part of the collection and given an individual barcode;
- include titles in microform or CD (not individual cards of fiche except when 1 card = 1 title);
- include annuals;
- exclude periodicals;
- use explanatory notes for any unusual inclusions (e.g. documents, technical reports, individually catalogued maps).

b. Videos & Films:
- count all physical video & film formats;
• count physical items (e.g. 2 film reels = 2 units, series of 24 videos = 24 units).

c. Other formats:
• count all other items including other audio formats, other visual formats and back issue periodicals. Please refer to the definitions below to count the “other items”.

• count all physical sound recordings (e.g. LP records, cassette tapes, compact disks);
• count items intended to be used together as one unit (e.g. opera on 2 CDs = 1 unit);
• if two or more media are included (e.g. print and cassette tape), count as a single unit all items to be used in conjunction with each other.
• count all physical visual formats (e.g. slides, snapshots);
• do not count individual slides unless they do not form part of a set (i.e. 1 slide set = 1 unit);
• if two or more media are included (e.g. print & slides), count as a single unit all items meant to be used in conjunction with each other.
• include journals, magazines, and newspapers received in print, microform, or CD formats;
• count volumes if they are known, otherwise 1 year = 1 volume;
• include annual index volumes.

d. Total Volumes in Library Collection: (system will total automatically)
• add $a + b + c = d$

Periodicals:
e. Total Current Print Subscriptions:
• count titles of journals, magazines, and newspapers currently received in print, microform, or CD formats (e.g. Canadian Newsdisc = 8 titles);
• exclude annuals (counted in a) above);
• include gift subscriptions and those being received on exchange;
• include departmental subscriptions only if they are accessible to the college community (i.e. listed in library catalogue and available for use);
• count duplicate subscriptions (i.e. if the library subscribes to two copies of a title count 2);
• include Statistics Canada periodicals if they are treated like a periodical;
• exclude subscriptions to electronic periodical indexes and abstracts.

5.2 COLLECTIONS – ELECTRONIC

a. Electronic Monographs:
• count the titles that would be monographs if issued in print format, i.e, non-serial publications of any length issued in electronic format instead of or in addition to, print format. Include books owned or leased by the library. Government publications are included as are free monographs on the Web catalogued in the OPAC or specifically linked to the library’s web site.

b. Streaming Media:
• count streaming videos or other media listed in the library catalogue or linked to the library’s web site, whether purchased, leased or free on the Web.
c. **Electronic Serial Titles:**
- report the total number of unique electronic serial titles that you currently acquire and to which you provide access;
- include both purchased and non-purchased titles;
- do not include duplicate counts of serial titles; report each title once, regardless of how many subscriptions or means of access you provide for that title – i.e. if a title is accessible through multiple databases, count it only once;
- include titles from aggregated packages;
- Electronic serials acquired as part of a bundle or an aggregated package should be counted at the title level, even if they are not catalogued, as long as the title is made accessible directly by the library (e.g. through a finding aid)

d. **Total Electronic Titles in Collection: (system will total automatically)**
- add a + b + c = d

6. **USE**

a. **Reference transactions:**
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. Information sources include printed and non-printed materials, machine-readable databases (including computer-assisted instruction), catalogues and other holdings, records and, through communication or referral, other libraries and institution, and persons both inside and outside the library. Include information and referral services (including technology based questions, if your reference staff is responsible for answering technology based questions). 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. Sampling of a typical week may be used to extrapolate for a full year. (CARL definition).

- count all questions handled (i.e. regular, and extended reference questions);
- **include** questions associated with electronic searching;
- **include** electronic reference questions;
- **include** real-time-reference interactions (i.e. virtual reference, AskAway);
- **exclude** questions associated specifically with a bibliographic instruction class;
- **exclude** directional questions as these will be counted separately.

This is the way this question will appear on the stats collection form
6a (i) Reference questions
6a (ii) Directional questions
6a (iii) Total

**Library Instruction**

b. **Number of participants at group presentations:**
- report total number of participants in the presentations - count all students receiving bibliographic instruction whether in tutorial groups, tours, or library skills classes;
- personal one-on-one instruction in the use of sources should be counted as a reference transaction.
c. **Number of presentations to groups:**
   - report the total number of library instruction sessions during the year. Count sessions presented as part of formal bibliographic instruction programs including class presentations, orientation sessions and tours. If the library sponsors multi-session credit courses that meet several times over the course of a semester, each session should be counted. Presentations both on and off the premises should be included when they are sponsored by the library. If you are using sampling, please include a footnote;
   - **include** internet research or database searching classes;
   - **include** classes taught to faculty and other employee groups.

**Circulation:**

d. **Downloads of Digital Articles:**
   - This number should be gathered using Counter Report JR1

e. **Downloads of e-book Sections:**
   - This number should be gathered using Counter Report BR2 if possible, but if not, BR1

f. **Total Digital Resource Use:**
   Will calculate automatically d + e = f

g. **Direct:**
   - count all items which are charged out for use, whether the use is inside (e.g. reserve) or outside the library;
   - **include** self/online renewals;
   - **exclude** items charged out to other libraries on interlibrary loan (included in g below);
   - **exclude** renewals.

h. **In-library use:**
   - count those items being used in the library and re-shelved by library employees, but that have not been charged out for use in the direct circulation transaction.

i. **Gate Count:**
   - count all traffic upon exit from the library (usually provided via an electric eye on the library security system).

**Interlibrary loan:**
   - count all items actually received and sent via interlibrary loan;
   - **include** items received or sent via any delivery method and from or to any type of library (including agencies with library holdings) in any part of the world;
   - all NET, MEC, OJAC, and fileserver project figures are supplied by the ELN office;
   - **exclude** intercampus loans within your institution.

j. **Interlibrary loans received** – Filled and unfilled (include all formats)

k. **Interlibrary loans sent** - Filled and unfilled (include all formats)
7. **LIBRARY EXPENDITURES (capital & operating)**
   For purposes of consistency “expenditures” means actual expenditures vs budgeted expenditures.

   a. **Personnel (salaries & benefits):**
      - count all salary & benefit expenditures for library personnel as listed in 4 above;
      - **exclude** personnel not covered by this survey (e.g. AV equipment distribution, Media Production or IMS);
      - **include** personnel working under special grant funding.

   b. **Collections:**
      Count all:
      - **Monographs** (count all expenditures on items listed as monographs in 5.1a above);
      - **Audio-Visual** (count all expenditures on items listed in 5.1b above);
      - **Current Print Periodicals** (count all expenditures on current subscriptions to print periodicals and indexes as included in 5.1e above);
      - **Electronic Monographs** (count all expenditures on items listed in 5.2a above);
      - **Streaming Media** (count all expenditures on items listed in 5.2b above);
      - **Electronic Serial Titles** (count all expenditures on items listed in 5.2c above);
      - **Other Electronic Resources** (we have included an Other Category to capture electronic resources not captured elsewhere. These would include, but may not be limited to: statistics, A&I, databases of art works etc).

   c. **Special Funding Envelopes:**
      - **include** all expenditures from special funding sources e.g. one time capital grants.

   d. **Other**
      count all other library expenditures (i.e. those expenditures that are not related to personnel and collections);
      - **include** only those other costs (e.g. printing, postage, interlibrary loans, mileage, conferences, supplies, etc.) if they are paid by the library's budget;
      - **exclude** one-time funding for building renovations
      use explanatory notes to indicate any variations from the norm.
      include all library expenditures not included in collections section or staffing under "Other".

   e. **Total Library Expenditures: (System will total automatically)**
      Add a + b + c + d = e

8. **INSTITUTIONAL EXPENDITURES:**
   a. Expenditures as reported from Audited Financial Statement for institution

9. **FACILITIES & HOURS (system will tally automatically for all sections)**
   a. **Total library area in square meters:**
      - for each campus with library personnel provide library area in square meters (to convert from square ft. to square meters multiply sq. ft. by .0920, e.g. 30,000 sq. ft. x .0929 = 2787 sq. meters);
      - **include** space for books and other library materials, space for storage of AV equipment if control of this equipment is the library's responsibility, library classrooms, study stations, seminar and study rooms, and workspace for library personnel;
• **exclude** areas used solely for janitorial, custodial and mechanical storage or services, lobbies, vestibules, building corridors, and other general access areas;
• add figures for each library to provide total for e.

b. **Total number of seats:**
• for each campus with library personnel count all study spaces for library users;
• **include** seats at computer workstations, equipment carrels, etc. **exclude** seats in staff areas, offices, meeting rooms, and other areas not normally occupied by users of library materials;
• add figures for each library to provide total for f.

c. **Total hours open per week: (September – April)**
• for each campus with library personnel count total operating hours per week;
• add figures for each library to provide total for g.

10. **COMPUTING INFRASTRUCTURE**

**NOTE:** Other than (a), questions noted below will vary over time and may not be applicable for historical comparisons.

a. **Number of public workstations:**
• for each campus library, count all public workstations that have Internet access (these are also counted in 9b above as part of the seat count).

11. **LIBRARY AUTOMATED SYSTEMS**
• self explanatory;
• use explanatory notes for any variations.
• Discovery Service (e.g. Summon, Ebsco Discovery Service, Primo);
• ERM: Electronic Resource Management (e.g. CUFTS);
• Link Resolver (e.g. SFX, CUFTS/Godot).