

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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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.

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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
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Tel.: 301-654-2512 (main)
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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:

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California Digital Library

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

Denise Davis, Co-chair after 1/31/2013
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NISO Voting Members

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

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American Theological Library Association (ATLA)
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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.

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- **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:

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- 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](#)

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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.

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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](#)

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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

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

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.

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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.

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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.