April 25, 2011

TO: ARL Statistics and Assessment Committee (Board committee)

Larry Alford (Temple) 2009–2011
Cynthia Archer (York) 2011-2013
Colleen Cook (McGill) 2010–2012 (ARL Board liaison)
Joyce Garnett (Western Ontario) 2011-2013
Joan Giesecke (Nebraska) 2010–2012
Victoria Montavon (Cincinnati) 2010–2012
Ingrid Parent (British Columbia) 2010–2012
Scott Seaman (Ohio) 2009–2011
Jay Starratt (Washington State) 2011-2013
Suzanne Thorin (Syracuse) 2010–2012
Tom Wall (Boston College) 2009–2011
Gordon Fretwell, Consultant 2010-2012
Eileen Hitchingham (Virginia Tech, retired director as of spring 2011)
Fred Heath (U of Texas) (Liaison to 21st Century Collections Task Force)
Robert Fox (Louisville)
Judith Nadler (Chicago)

FROM: Bill Potter, University of Georgia 2010-2012 (Chair)
Martha Kyrillidou, ARL Staff

*italicized names indicate Task Force member

Enclosed are the agendas and supporting documents for the ARL Statistics and Assessment Committee meeting and the Task Force on the Review of the Annual Surveys. Members of the committee who are not members of the Task Force are encouraged to attend both parts of the meeting (and vice versa). The ARL Statistics and Assessment committee meeting will take place from 7:30 a.m. to 8:45 a.m. and the Task Force from 9:00 a.m. to noon on Wednesday, May 4, 2011, in the St. Antoine Room of the Le Westin Montreal Hotel, Quebec.
The Statistics and Assessment Committee meeting will focus on a review of the program activities and an overview of the Task Force activities. The Task Force meeting will focus on a detailed review of the annual surveys where we will attempt to build consensus in terms of each one of the questions we ask in the annual surveys by deciding whether we (a) keep that question, (b) drop it, or (c) table that question for further discussion in the future.

The Board Committee on Statistics and Assessment has been called upon to accelerate the assessment agenda with the new strategic plan 2010-2012. The committee chair will provide a briefing at the Business Meeting regarding the status of various assessment activities and the direction of the revision of the annual surveys. The committee chair is also reviewing the summary grid reports to ensure that programmatic activities serve the needs of ARL’s strategic directions. Colleen Cook is the designated ARL Board member liaison to the committee.

We look forward to working with you in continuing to build an agenda that serves the needs of the member libraries with a focus on improving the annual surveys and ARL’s data collection activities in general over the next two years.

We look forward to a productive meeting with your continuing engagement, input, direction and support.
Welcome and introductions of new members for 2011-2013.

(a) Approval of Minutes (5 minutes)

Attachment A: Minutes from the 157th ARL Membership Meeting, ARL Statistics and Assessment Committee

(b) Review of the grid activities (highlights: Library Assessment Conference, Balanced Scorecard, LibValue IMLS grant, Business Intelligence, Training/Meetings) (40 minutes)

Attachment B1: Grid Report
Attachment B2: Page 5 – Stats & Assessment for Business meeting

(c) Task Force Highlights (30 minutes)

Attachment C: Summary of the findings with Word Cloud

ARL Task Force on the Review of the
ARL Annual Salary Survey, ARL Statistics and
ARL Supplementary Statistics
Wednesday, May 4, 2011
9:00 a.m. – noon

(d) ARL Statistics Survey Discussion (60 minutes)

Attachment D: ARL Statistics Survey and Instructions

(e) ARL Supplementary Statistics Survey Discussion (45 minutes)

Attachment E: ARL Supplementary Statistics Survey and Instructions

(f) ARL Annual Salary Survey Discussion (60 minutes)

Attachment F: ARL Annual Salary Survey & Instructions
MINUTES
ARL Statistics and Assessment Committee Members
Larry Alford (Temple) 2009–2011
Colleen Cook (Texas A&M) 2010–2012 (ARL Board member)
Joan Giescke (Nebraska) 2010–2012 (absent/rep)
Eileen Hitchingham (Virginia Tech) 2008–2010
Ernie Ingles (Alberta) 2008–2010
Victoria Montavon (Cincinnati) 2010–2012
Judith Nadler (Chicago) 2008–2010
Ingrid Parent (British Columbia) 2010–2012
Scott Seaman (Ohio) 2009–2011
Suzanne Thorin (Syracuse) 2010–2012 (absent/rep)
Tom Wall (Boston College) 2009–2011
Bill Potter (University of Georgia, Chair) 2010–2012
Gordon Fretwell (Consultant)
Martha Kyrillidou (ARL Staff)

The meeting took place in two parts – the first part focused on the regular review of the program and the second part focused on discussing the “Task Force on Reviewing the ARL Statistics, ARL Supplementary Statistics and ARL Annual Salary Survey” charge. The minutes of the 156th ARL Membership Meeting were approved by a motion from Colleen Cook and seconded by Eileen Hitchingham. Martha Kyrillidou provided an overview of the program activities as they are described in the summary grid.

Martha highlighted the LibValue article in the special issue of the RLI Bimonthly Report. A discussion followed regarding the use of the term Return on Investment (ROI), which philosophically conveys a market driven approach. Typically libraries, being cultural institutions, have not used this approach, and have emphasized values and a service commitment rather than ROI. Judith Nadler indicated that ‘label’ is not that critical as long as we all know what we mean by the need to demonstrate value and return on investment (ROI). There may be a bit of vulnerability in talking about ROI without context, but as long as the term is used in the appropriate context it should not be threatening.
The Balanced Scorecard pilot was highlighted as there was a program presentation by Johns Hopkins, McMaster, U of Washington and the U of Virginia. Depending on interest we may initiate another cohort. [Note: Interest indeed was strong and we have a second cohort of ten libraries that are moving forward as of May 2011].

Four RLLF fellows, Bob Fox, Patrick Reakes, Bryan Skib, and Ann Snowman presented an exploration of the ARL Profiles and highlighted a number of emerging themes for the committee. The profiles will inform the upcoming revision of the annual surveys.

The ARL Board in consultation with the Chair of the ARL Statistics and Assessment committee and the ARL Board Liaison have discussed the need to review the annual surveys to address concerns about their relevance in today’s environment. It was proposed that a Task Force be formed. Over the next two years, this task force will work closely with the 21st Century Collections task force to modernize the annual data collection activities. The ARL Board is looking for volunteers from the ARL Statistics and Assessment Committee to form the Task Force.

It was pointed out that revising the annual surveys is a critical undertaking for ARL; the ceasing of the ARL Preservation Statistics was a monumental step and looking into pruning the other surveys with an eye on collecting those data elements that are increasingly more relevant is a much needed next step. The foremost goal is to help members with whatever they use the statistics for: What aspects of the statistics help them manage their libraries and build strong arguments for increased funding? Which data elements are important to count especially as collections are increasingly becoming more and more similar? How important are formats like manuscripts, sound recordings, archival video, movies, special collections, and how can we capture these elements in a more useful way that demonstrates the value of these special collections to the institution? Currently the investment index is serving as a good measure and is not affected by collection counts; do we want to explore and be ready to describe research library contributions in anticipation of how collections and collaborations will evolve in the future years?

To start thinking about the data elements, Colleen Cook indicated that we need to consider the purpose of each statistic; each statistic needs to have enough value to the community to be considered worth keeping. The goal is to have as few statistics as possible that are highly relevant. The committee was admonished to keep the following in mind regarding the annual statistics and the collection of the data: simplify; collect what is relevant/applicable; collapse the data into fewer categories; collect information that is valuable to the library directors. Eileen Hitchingham suggested that we can sort through the variables in terms of utility/importance and level of effort exerted to collect the information.

We need to consider whether format is relevant and whether ownership is something that is meaningful as we move forward. Ernie Ingles indicated that ownership continues to be important, especially ownership with commitment to
preservation of digital and other formats. Ingrid Parent pointed out that the historical value of the data collection is something that we will have to consider. Yet Gordon highlighted how difficult it is to ascertain the quality of the collection that a research library takes responsibility to curate. Ultimately we need to answer the question: How do we define these statistical categories in ways that bring utility to the largest number of libraries? Should we lobby to see library indicators included in the university rankings? University rankings sometimes ignore libraries as having any relevance to the definition of a research institution, especially rankings outside North America.

Larry Alford indicated that we need to focus on the data that are useful and relevant. It still makes a difference to indicate that a library is falling in the index rankings; students and faculty look at the strength of the library to make decisions as to whether they will choose a specific institution. Annual rankings emphasizing the size of the print collections have prevented libraries from discarding print for example. However, this is not the right strategy, as the ranking tables should not drive local decision making. For example, we need to worry about serials because serials are relevant to our users and not necessarily because of the rankings. Electronic delivery is increasingly important; as a result, do we separate it from the print and other formats? Can we have a compelling story about the move to digital? Can we emphasize downloads and cost per download or value per use? Special collections that distinguish institution A from B are also increasingly important. There is an IMLS study ARL is pursuing in collaboration with Ithaka S+R that focuses on special collections.

Can we create an ARL Statistics Lite survey that would primarily address the kind of data we give to the provosts? We can also develop different surveys for different levels of need. Ernie Ingles questioned whether we truly need to downsize the surveys – for example, are the counts of microforms such an imposition that we need to eliminate them? Ernie worries that we will lessen the utility of the annual statistics by forcing ourselves into making choices. Colleen Cook pointed out that another factor for the US institutions to consider is that they have to collect many of these data for the Academic Library Surveys (ALS) conducted by NCES.

Fundamentally, we need to collect some data for (a) historical purposes, others for (b) management purposes, and yet others for (c) local reasons. Larry Alford emphasized how we need to be able to articulate the role of a research library through our data; the democratization of library services has the outcome of making research libraries look more like any other type of academic library.

Gordon raised the issue of the compliance with the definitions. Does the committee want to address these issues through auditing or other enforcing mechanisms? For example, issues related to the inclusion of branches or fringe benefits, etc. The committee did not think we need to do more than the current level of editing and documentation.

In conclusion, Bill Potter asked for a show of hands to volunteer for service to the Task Force and he secured commitment from a subgroup that will engage the issues in
an in depth fashion over the next two years. The task force will have its own space/list and once we finalize the appointments through the ARL Board/Executive Committee, a plan for collecting in depth feedback from all the directors will be developed. Bill Potter indicated that he basically would like to see each Task Force member interview 12-15 directors. We will also host meetings with the survey coordinators -- while the directors can tell us what is useful, the coordinators can tell us what is easy/difficult to collect. [Note: Meetings with the survey coordinators were held in January in San Diego and in April in Philadelphia in addition to task force members completing interviews with 100 ARL directors].
ARL Statistics and Assessment
Review of Activities, Projects, and Priorities as of January 2011

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<tr>
<th>Areas of Activity</th>
<th>UNDERWAY AND PLANNED</th>
<th>Summary of Accomplishments 2011</th>
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<tbody>
<tr>
<td>1. Statistics and Assessment Committee</td>
<td>• Transitioning the ARL Profiles report from <a href="http://directors.arl.org/wiki/institution-profiles">http://directors.arl.org/wiki/institution-profiles</a> to a public forum.</td>
<td>• An action report with recommendations was published and a final report is mounted on the ARL website: <a href="http://www.arl.org/stats/index/profiles/index.shtml">http://www.arl.org/stats/index/profiles/index.shtml</a></td>
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<td>• The Task Force on Reviewing ARL Statistics, Supplementary Statistics and Annual Salary Survey solicited input and interviewed 100 ARL directors. Meetings were held in San Diego in Jan with the ACRL Personnel Administrators and the ARL Survey Coordinators groups to discuss issues related to the annual surveys. On March 30 a meeting was held at the van Pelt Library at the U of Pennsylvania on “Regrounding the ARL Annual Surveys in the Digital Age: Revisiting Our Assumptions, Revising the Questions, and Incorporating your Feedback.” Task Force members are sorting through the input received to chart the direction of the revision of the annual surveys.</td>
<td>• B. Franklin, G. Fretwell (Consultant to ARL Statistics and the Task Force on Reviewing ARL Statistics, Supplementary Statistics and Annual Salary Survey) and M. Kyrillidou presented at the ALCTS/PARS Preservation Forum on the topic of “ARL Preservation Statistics” Participants were asked to discuss issues around: What preservation statistics should ARL be collecting? What are valuable to your institution? Powerpoint presentation is available at: <a href="http://www.arl.org/bm~doc/preservationjan2011.pdf">http://www.arl.org/bm~doc/preservationjan2011.pdf</a></td>
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<td>• Maintain communication with liaisons to external organizations such as ALA/ACRL, NISO, CARL, ABDU, RLUK, SCONUL, COUNTER and LIBER.</td>
<td>• Survey Coordinators and SPEC Liaisons meeting took place January 7, 2011.</td>
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<td>• Supporting RLLF research projects.</td>
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Accomplishments since February 2011 ARL Board Meeting noted in purple.
## Statistics and Assessment • Review of Activities, Projects, and Priorities as of January 2011

### Areas of Activity

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<tr>
<td><strong>2.</strong> StatsQUAL®, A gateway to library assessment tools including ARL Statistics™, LibQUAL+, ClimateQUAL®, MINES for Libraries®, M</td>
<td><strong>•</strong> Established and promoted a subscription model for the ARL Statistics® Interactive Edition for non-members at <a href="http://interactive.arlstatistics.org">http://interactive.arlstatistics.org</a>, member access <a href="http://www.arlstatistics.org">http://www.arlstatistics.org</a>; ARL Investment Index available through Analytics open access.</td>
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<td>Support infrastructure, research and development and operational activities that ensure the evidence collected for strategic purposes, as articulated in item #1, is readily available and usable</td>
<td><strong>•</strong> Activities at ALA in San Diego (January 2011) and at ACRL in Philadelphia (March 2011); the LibQUAL+/StatsQUAL® Booth, training and community meetings were well attended and a great success.</td>
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<td><strong>•</strong> Refine the family of StatsQUAL® websites including LibQUAL+, ClimateQUAL®, MINES for Libraries®, ARL Statistics™; automate the production of the .pdf publications.</td>
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<td><strong>•</strong> LibQUAL+/StatsQUAL® Booth at ALA in June 2011.</td>
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<td><strong>•</strong> Develop Value/ROI tools building upon earlier work at Illinois Urbana-Champaign, Tennessee and other libraries as part of the StatsQUAL gateway.</td>
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<td><strong>3.</strong> LibQUAL+®, Charting Library Service Quality</td>
<td><strong>•</strong> Developing a model for regrounding LibQUAL+® for the digital environment; submitting a paper for the Northumbria conference (M. Kyrillidou, B. Thompson and C. Cook) and implementing a pilot in Fall 2011. Analysis and pilot will be based on the NSF DigiQUAL® data and survey items.</td>
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<td>Understanding and tracking user perceptions systematically over time through well-documented and thoroughly researched protocols</td>
<td><strong>•</strong> In the first three months of the year, over 110 institutions registered for LibQUAL+® survey runs in 2011 and library users have completed over 80,000 surveys.</td>
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<td>Track user perceptions of how libraries affect their desired outcomes (academic advancement success, etc.) and how libraries are used as physical buildings, remote gateways, and how they compare to other popular gateways like Google</td>
<td><strong>•</strong> LibQUAL+® Membership fee is introduced to support access to all notebooks irrespective of participation year and for augmenting peer analysis modules.</td>
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<td>Foster a culture of excellence in providing library service</td>
<td><strong>•</strong> A successful Service Quality Evaluation Academy took place in Toronto on March 14-18, 2011.</td>
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<td>Help libraries better understand user perceptions of library service quality</td>
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<td>Collect and interpret library user feedback systematically over time</td>
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<td>Provide libraries with comparable assessment information from peer institutions</td>
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**ATTACHMENT B1: GRID REPORT**
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| 3. LibQUAL+®, continued.               | • Monitor developments with Project COUNTER, the ScholarlyStats project, MESUR, and other external efforts aiming at the development of decision support systems for libraries. Explore business intelligence developments in libraries.  
   • Exploring implementation of MINES at the U of South Dakota possibly with further state wide implementation.  
   • METS and XML workshops offered and planned. See: http://www.arl.org/stats/statsevents/  
   • Analyze further ARL Supplementary Statistics and consider revisions when needed in definitions (see Areas of Activity, Underway and Planned #1). | • Awarded four in-kind grants for 2011: Fort Valley State University (FVSU), Gateway Community College, Governors State University, and Texas Southern University. Awarding grants for 2012. See: http://www.arl.org/news/pr/LibQUALgrant7april11.shtml |
| 4. MINES for Libraries®/E-Metrics       | • C. Tenopir to keynote QQML and Northumbria; M. Kyrillidou and S. Town to present on value driven metrics and relate the concept of the value scorecard to the ARL scenarios planning activity at the QQML conference in Athens in May, 24 to May 27.  
   • Working on making available an online calculator based on published ROI models. | • Completed data collection for OCUL 2010-2011. Research on mandatory versus optional protocol. Catherine Davidson (RLLF Fellow), Dana Thomas, Martha Kyrillidou and Terry Plum to present a paper at the Northumbria Conference at York in August. |
| 5. Lib-Value (ROI)                      |                                                                                     | • Lib-Value activities include testing methodologies at Tennessee, Illinois at Urbana-Champaign, Syracuse and Pittsburgh. The three-year grant began on 12/1/2009.  
   • Lib-Value monthly phone calls; planning in person meeting in the fall. |
# Statistics and Assessment • Review of Activities, Projects, and Priorities as of January 2011

## Areas of Activity

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<td>Implementation in Library Scorecard work is progressing with Johns Hopkins, McMaster, Virginia and Washington having developed “strategy maps” and completed their metrics; Texas at Austin has joined and is developing strategy and metrics along similar lines. Exploring how the BSC work can inform ARL data collection activities.</td>
<td>Launched consulting service with Jim Self, Steve Hiller, and Raynna Bowlby: Organizational Performance Assessment for Libraries (OPAL); R. Bowlby authoring related article.</td>
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<td>Personnel Administrators and Staff Development Officers planning a Human Resources Symposium along the lines of earlier ARL events.</td>
<td>A webinar on the Balanced Scorecard was offered on February 14 and a call for participating in a BSC cohort resulted in ten new libraries interested in participating in 2011-2012; L. Mengel (Johns Hopkins) and V. Lewis (McMaster) to present on their BSC experience at Northumbria; BSC invitational sessions to be held at Northumbria for an in depth exchange on strategy and metrics.</td>
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<td>7. Human Resources</td>
<td>Planning to work with Stanley Wilder in doing further analysis of the demographic data collected in 2010-2011.</td>
<td>Three libraries participating in ClimateQUAL® in 2011; normative data updated on the Web.</td>
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<td>Personnel Administrators and Staff Development Officers planning a Human Resources Symposium along the lines of earlier ARL events.</td>
<td>Collected feedback from Personnel Administrators and Staff Development Officers on revisions needed to the ARL Annual Salary Survey.</td>
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*ATTACHMENT B1: GRID REPORT*
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<td>7. Human Resources, continued.</td>
<td>• C. Lowry to present at the Northumbria Conference at York in August; M. Kyrillidou and P. Hanges to present on ClimateQUAL® at the QQML conference in Athens in May; Concurrent session scheduled with B. Franklin (Connecticut), S. Pritchard (Northwestern) and S. Yee (Wayne State) to take place at the May membership meeting.</td>
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| 8. SPEC Survey Program | SPEC topics are aligned with ARL’s strategic initiatives and make the program more visible to savvy researchers; grounded in information that the authors seek to support their own institutional planning and development, participation can benefit ARL institutions’ directly along with the broader library community. For more than 35 years ARL has gathered and disseminated data through the SPEC survey program to assist libraries in the continuous improvement of their management systems. | • The SPEC survey program gathers information on current research library operating practices and policies and publishes the SPEC Kit series as guides for libraries. Topics for 2011:  
– The User Experience by Bob Fox, Louisville and Ameet Doshi, Georgia Tech  
– Collecting Global Resources by Wookjin Cheun, Marion Frank-Wilson, Luis Gonzalez, Akram Khabibullaev, Wen-Ling Liu, Andrea Singer, and Noa Wahrman, Indiana Bloomington  
– Socializing New Hires by Sharon Ladenson, Diane Mayers, and Colleen Hyslop, Michigan State  
– Digital Preservation by Gail McMillan, Virginia Tech, Katherine Skinner and Matt Schultz, Educopia  
– Reconfiguring Library Service Delivery by Kay Vyhnanek and Christy Zlatos, Washington State |
Statistics and Assessment Committee

Three activities/items that have been accomplished since January 2011:

- Task Force on Reviewing ARL Statistics, ARL Supplementary Statistics, and ARL Annual Salary Survey has collected community input regarding the annual surveys and is using that data to inform the next phase of the review process.

- A new cohort of libraries is engaging in strategy development through the Balanced Scorecard framework and a February 14 webcast provided both leadership and organizational development perspectives from three ARL libraries participating in the BSC.

- The Service Quality Evaluation Academy held in Toronto provided in-depth intensive training in quantitative and qualitative methods to 30 librarians in March.

Three activities/items on the horizon that the committee will be addressing:

- Over the next 18 months, the Task Force will examine revision of the annual surveys reviewing aspects such as:
  - The elimination, or addition, of job categories in the Annual Salary Survey.
  - The statistics/metrics needed as part of the Library Statistics compilation to describe the transition research libraries are making.
  - The metrics regarding Special Collections that can effectively contribute to a broader picture of their breadth, size, use and intellectual/scholarly importance.

- The focus of research and pilot testing activities under the DigiQUAL umbrella in the coming year will be an investigation of surfacing a digital only dimension(s) rising from the importance of the Information Control dimension of LibQUAL+®.

- Lib-Value IMLS grant activities will focus on the development of tools, including ROI calculators and contingent valuation approaches for academic libraries and investigate how projects such as MINES for Libraries and ClimateQUAL can inform the value and impact library agenda.

One issue/discussion item that the committee would like to receive feedback from the ARL membership:

- The general direction of the review of the annual surveys – in particular the efforts to revise the ARL Annual Salary Survey, the ARL Statistics and the ARL Supplementary Statistics.
ARL Statistics: summary of conversations with ARL Directors
DRAFT: April 25, 2011

This summary owes thanks to the earlier version produced by Judith Nadler and John Kimbrough as well to the presentations made by Larry Alford, Joan Giesecke and Gordon Fretwell.

ARL has formed a Task Force to review the ARL Annual Salary Survey, the ARL Statistics and the ARL Supplementary Statistics. The charge was finalized at the October 2010 membership meeting and the Task Force was formed shortly afterwards. The first task the Task Force members engaged in was to interview the directors of ARL libraries seeking their feedback on the revision process. Feedback collected from 100 ARL library directors indicates the need to (a) share good information and analysis among member libraries in an efficient and effective way so they can compare themselves when there are similarities and acknowledge differences appropriately while learning from each other and transforming and growing research libraries; (b) good information is evidence that demonstrates the value of the library in a way that can be used externally with the public, internally with the university administration, as well as within the library with the ARL priorities defined by this order; and (c) streamline the annual data collection to focus on areas of critical importance while we establish new modes of sharing information either as a standing directory updated on an as needed basis or through data collection activities that are complying to different time cycle depending on various needs, and, of course, through ad hoc one time data collection activities as needed.

In particular, the directors provided the following insights related to specific questions about the annual surveys:

How would you like the ARL annual surveys to be revised? What questions would you like to see eliminated? Where do we need to collect more data? Where do we need more clarification?

The data collected by ARL is useful but reflects a historical/traditional view of librarianship that may no longer be appropriate today. In particular, the directors noted:

- E-books and e-serial measurements are of equal (if not greater) importance than print collection measurements.
- Consortial/cooperative arrangements and licensed content complicate what is “countable.” (Do we all get to count Google?) We are shifting models from “ownership” to “access” and our statistics should reflect this.
- We have many professionals working in our libraries who do not have an MLS. We also have an increasing number of positions (principally in IT but also in other areas) that require a different skill set than an MLS.
• Qualitative data, such as collection strengths, is important. Related to this, many of the quantitative statistics could use additional context to provide meaning. Example: ILL borrowing trends – is change (whether increase/decrease) a good or bad thing?

The directors also had some suggestions for the data collection process:
• There is much confusion over the relationship between the “main” and “supplementary” statistics. Many questions in the supplement seem important enough to be in the main section.
• As much as possible, ARL reporting should track with data collection for internal use. Nobody expects 100% overlap, but libraries shouldn’t have to collect two completely different sets of statistics.

1. **Regarding the Annual Salary Survey:**
   a) Are there job categories that no longer make sense, either by their definition or the number of staff to whom the categories apply? Which ones?
   b) Are there new job categories that you feel are needed in order to adequately describe work being done as research libraries transition to their future state? How do you describe them?

• Job codes are outdated and don’t represent positions that are transforming libraries (metadata librarian, digital professionals). How do you define professionals and how does that skew the data?
• Suggestions: separate librarians from other non-librarian professionals (such as Development Officers) so that we can get a clearer view of salaries.
• Concerns also came up with salary data vs. cost of living and how can we take cost of living into consideration.

2. **Regarding the annual Library Statistics compilation:**
   a) Are you asked to report statistics, which you feel are meaningless in research libraries as they transition to their future state? Which ones? Are you also asked to report them to the federal ALS survey (Statistics Canada for Canadian libraries)?
   b) Are there new statistics/metrics that are helpful to describe the transition research libraries are making, which are not collected currently? What are they/how would you describe them?

• For comparisons: Do the data follow standards and are they consistent? For example – serials: No one believes that the serials and volumes counts are valid because they aren’t standardized.
• However, expenditures counts are very valuable because the dollar amounts translate into indications of quality by virtue of how much the university is investing in the library.
• People want stats to help them demonstrate ROI. Most often used [statistic]: Dollars per student/faculty in comparison to their peers.
• People are interested in the historical view that the data provide. However the value for these data is decreasing.
• There is confusion about Main & Supp stats and some want to get rid of Supp stats.
• Lots of comments about definitions and duplication of effort within items, among surveys, and among different surveys (non ARL).
• We need to stop counting some things like: computer files, gov doc, CD roms, contract binding. These are meaningless.
• How can we document collaboration more? This is hard to understand from the data.
• We could pursue case studies. How do we incorporate online instruction into the ARL Stats data? Regarding consortial participation (such as joint storage facilities, for example), we need a better way to reflect that in the ARL Statistics.

3. Regarding Special Collections (If convenient, please discuss this with either the Head(s) of Special Collections and/or the Director of the Library prior to midwinter):
   a) With specific regard to special collections (however organized within your library), do you feel the single statistic now collected (linear feet of manuscripts) is adequate?
   b) What metrics do you feel can contribute to a broader picture of their breadth, size, use and intellectual/scholarly importance?

Linear feet isn’t useful.
How can we look at the quality of special collections, rather than the quantity?

Like other statistics, measurements that help us compare special collections across institutions would be helpful, and we need to better relate (special) collections to the campus – line up relevant archives/resources with University research centers/programs, instruction with Library materials with impact on student learning.

Suggested new special collections metrics:
• # of collections (paired with size – perhaps “# of collections under 5 boxes, # of collections over 50 boxes”)
  o # of born-digital special collections
• Counts of AV materials, photographs, maps, etc.
• % of collections processed and unprocessed
- Would need to have standard definitions
- Might help us know if our backlog of unprocessed collections is typical or atypical compared to peers
- On the other hand: do University administrators want to see this? Does knowing this information help us make administrative decisions?
- Measure discoverability – how many collections have finding aids or EADs?
- Use of special collections (# of: tours/instruction sessions, visitors, reference questions answered, bound materials circulated, hits on digital collections)
- Could we better define the role of the campus library in University records management?
  - Are the University Archives part of the campus library?
- % of overall Library collection and staffing budgets spent on special collections
- Is there a way to measure the impact of special collections on Library development? (Sometimes a donor relationship begins with a book donation, then moves to financial support)
- How much of the budget for special collections derives from endowed sources?
### ARL Statistics 2009-10 Worksheet

This worksheet is designed to help you plan your submission for the 2009-10 *ARL Statistics*. The figures on this worksheet should be similar to those in the “Summary” page of your web form, except in cases where data are unavailable. If an exact figure is unavailable, use “NA/UA”. If the appropriate answer is zero or none, use “0.”

**Reporting Institution _____________________________________________ Date Returned to ARL ____________**

**Report Prepared by (name) ____________________________________________________________**

**Title __________________________________________________________________________________**

**Email address_____________________________________________________ Phone number ______________**

**Contact person (if different)_____________________________________________________________________________**

**Title __________________________________________________________________________________**

**Email address_____________________________________________________ Phone number ______________**

**PAGE ONE – VOLUMES AND TITLES:**

1. **Volumes held June 30, 2010 (1.a + 1.b)**
   
   1a. Volumes held June 30, 2009  
   
   (1.a) ______________________

   1b. Volumes added during the year (1.b.i – 1.b.ii)  
   
   (1.b) ______________________

   (i) Volumes added – Gross  
   
   (1.b.i) ____________________

   (ii) Volumes withdrawn during year (1.b.ii)  
   
   ___________________________

2. **Titles held June 30, 2010**
   
   (2) ______________________

3. **Number of monographic volumes purchased**
   
   (3) ______________________

4. **Basis of volume count is:**
   
   (4) _____ Physical  
   
   _____ Bibliographic
SERIALS

5. Total number of serial titles currently received, including periodicals (5.a + 5.b) (5) ______________
   
   5a. Number of serial titles currently purchased (5a.i + 5a.ii) (5a) ______________
   
   5a.i Electronic (5a.i) ______________
   
   5a.ii Print (and other format) serials purchased (5a.ii) ______________
   
   5b. Number of serial titles currently received but not purchased (5b.i + 5b.ii + 5b.iii + 5b.iv) (5b) ______________
   
   5b.i Consortial (5b.i) ______________
   
   5b.ii Freely accessible (5b.ii) ______________
   
   5b.iii Print (and other format) – Exchanges, gifts, etc. (5b.iii) ______________
   
   5b.iv Government documents (5b.iv) ______________

6. Government documents are included in count of Current Serials? (6) _____ Yes _____ No

OTHER LIBRARY MATERIALS

7. Microform units (7) ______________

8. Government documents not counted elsewhere (8) ______________

9. Computer files (9) ______________

10. Manuscripts and archives (linear ft.) (10) ______________

AUDIOVISUAL MATERIALS

11. Cartographic (11) ______________

12. Graphic (12) ______________

13. Audio (13) ______________

14. Film and Video (14) ______________
15. Are the below figures reported in Canadian dollars?  
   (15)  ______ Yes  
          ______ No

   (16) ___________________

   16a. Monographs  
   (16a) ___________________

   16b. Serial titles, including periodicals  
   (16b) ___________________

   16c. Other Library Materials  
   (16c) ___________________

   16d. Miscellaneous  
   (16d) ___________________

17. Contract binding  
   (17) ___________________

18. Total Salaries and Wages \((18.a + 18.b + 18.c)\)  
   (18) ___________________

   18a. Professional staff  
   (18a) ___________________

   18b. Support staff  
   (18b) ___________________

   18c. Student assistants  
   (18c) ___________________

19. Fringe benefits are included in expenditures for salaries and wages?  
   (19)  _____ Yes  
          _____ No

20. Other operating expenditures  
   (20) ___________________

21. Total library expenditures \((16 + 17 + 18 + 20)\)  
   (21) ___________________

**ELECTRONIC MATERIALS EXPENDITURES**

22. One-time electronic resource purchases  
   (22) ___________________

23. Ongoing electronic resource purchases (e.g., subscriptions, annual license fees)  
   (23) ___________________

24. Bibliographic Utilities, Networks, and Consortia  
    24a. From internal library sources  
    (24a) ___________________

    24b. From external sources  
    (24b) ___________________

25. Computer hardware and software  
   (25) ___________________

26. Document Delivery/Interlibrary Loan  
   (26) ___________________
PAGE FOUR – PERSONNEL AND PUBLIC SERVICES

PERSONNEL (Round figures to nearest whole number.)

27. Total Staff FTE (27.a + 27.b + 27.c) (27) ______________

27a. Professional staff, FTE (27a) _____________

27b. Support staff, FTE (27b) _____________

27c. Student assistants, FTE (27c) _____________

STAFFED SERVICE POINTS AND HOURS

28. Number of staffed library service points (28) ______________

29. Number of weekly public service hours (29) ______________

INSTRUCTION

30. Number of library presentations to groups (30) ______________

30a. Is the library presentations figure based on sampling? (30a) _____Yes _____No

31. Number of total participants in group presentations reported in line 30 (31) ______________

31a. Is the total participants in group presentations figure based on sampling? (31a) _____Yes _____No

REFERENCE

32. Number of reference transactions (32) ______________

32a. Is the reference transactions figure based on sampling? (32a) _____Yes _____No
PAGE FIVE – PUBLIC SERVICES AND LOCAL CHARACTERISTICS

CIRCULATION

33. Number of initial circulations (excluding reserves) (33) ___________________

34. Total circulations (initial and renewals, excluding reserves) (34) ___________________

INTERLIBRARY LOANS

35. Total number of filled requests provided to other libraries (35) ___________________

36. Total number of filled requests received from other libraries or providers (36) ___________________

PhD DEGREES AND FACULTY

37. Number of PhDs awarded in FY2009-10 (37) ___________________

38. Number of fields in which PhDs can be awarded (38) ___________________

39. Number of full-time instructional faculty in FY2009-10 (39) ___________________

ENROLLMENT – FALL 2009
(Line numbers refer to IPEDS survey form.)

40. Full-time students, undergraduate and graduate (Add line 8, columns 15 & 16, and line 14, columns 15 & 16.) (40) ___________________

41. Part-time students, undergraduate and graduate (Add line 22, columns 15 & 16, and line 28, columns 15 & 16.) (41) ___________________

42. Full-time graduate students (Line 14, columns 15 & 16.) (42) ___________________

43. Part-time graduate students (Line 28, columns 15 & 16.) (43) ___________________

FOOTNOTES

On the web form, you will be able to add footnotes to individual questions, as well as footnotes that apply to your entire institution. Please provide any information which would clarify the figures submitted, e.g., the inclusion of branch campus libraries or any special projects which might cause radical increases or decreases. Please use the footnotes in the ARL Statistics 2008-09 for comparison if necessary. Please consult the Data Repository under www.arlstatistics.org for a copy of last year’s footnotes. These can be found under “Data Repository” after you login to www.arlstatistics.org. Please make an effort to word your footnotes in a manner consistent with notes appearing in the published report, so that the ARL Office can interpret your footnotes correctly. Please use a concise sentence/paragraph format when writing footnotes—do not use bullets or make a bullet list.

NOTE: Any change over 10% in any answer to any of the survey’s questions over the preceding year’s response (2008-2009) should be addressed with a footnote.

Submit the completed questionnaire by October 15, 2010.

For assistance, please e-mail Martha Kyrillidou (martha@arl.org) or Shaneka Morris (shaneka@arl.org)
Tel. (202) 296-2296.
ARL STATISTICS QUESTIONNAIRE, 2009-10
INSTRUCTIONS FOR COMPLETING THE QUESTIONNAIRE

http://www.arl.org/stats/annualsurveys/arlstats/index.shtml

GENERAL OVERVIEW

Definitions of statistical categories can be found in NISO Z39.7-2004, Information Services and Use: Metrics & statistics for libraries and information providers--Data Dictionary (http://www.niso.org/). ARL has been modifying the interpretation of the standard definitions to address questions posed by library staff at various member institutions that complete the survey and with feedback from the ARL Statistics and Assessment Committee (http://www.arl.org/stats/aboutstats/index.shtml).

• Please do not use decimals. All figures should be rounded to the nearest whole number.

• Please respond to every question. If an exact figure cannot be provided, use NA/UA to indicate that the figure is either unavailable or not applicable. If the appropriate answer is zero or none, use 0.

Although the form allows for data to be entered from both main and branch campuses, an effort should be made to report figures for the main campus only. (The U.S. National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS) defines a branch institution as “a campus or site of an educational institution that is not temporary, is located in a community beyond a reasonable commuting distance from its parent institution, and offers organized programs of study, not just courses”). If figures for libraries located at branch campuses are reported, please specify which branch libraries are included and which ones are excluded in the FOOTNOTES section of the ARL Statistics Worksheet.

• A branch library is defined as an auxiliary library service outlet with quarters separate from the central library of an institution, which has a basic collection of books and other materials, a regular staffing level, and an established schedule. A branch library is administered either by the central library or (as in the case of some law and medical libraries) through the administrative structure of other units within the university. Departmental study/reading rooms are not included.

• The questionnaire assumes a fiscal year ending June 30, 2010. If your fiscal year is different, please indicate this in the FOOTNOTES section of the ARL Statistics Worksheet by adjusting the reporting period.

• Footnotes. Explanatory footnotes will be included with the published statistics. Provide any notes you may have in the footnotes area at the end of the survey. Reporting libraries are urged to record there any information that would clarify the figures submitted in that line, e.g., the inclusion and exclusion of branch campus libraries. Please make an effort to word your footnotes in a manner consistent with notes appearing in the published report, so that the ARL Office can interpret your footnotes correctly. Please use a concise sentence/paragraph format when writing footnotes—do not use “bullets” or make a “bullet list.”
PAGE ONE – VOLUMES AND TITLES:

Questions 1-1b. Volumes:

**Question 1. Volumes in Library.** Use the ANSI/NISO Z39.7-2004 definition for volume as follows:

> a single physical unit of any printed, typewritten, handwritten, mimeographed, or processed work, distinguished from other units by a separate binding, encasement, portfolio, or other clear distinction, which has been cataloged, classified, and made ready for use, and which is typically the unit used to charge circulation transactions. Either a serial volume is bound, or it comprises the serial issues that would be bound together if the library bound all serials.

Include duplicates and bound volumes of periodicals. For purposes of this questionnaire, unclassified bound serials arranged in alphabetical order are considered classified. Exclude microforms, maps, nonprint materials, and uncataloged items. If any of these items cannot be excluded, please provide an explanatory footnote.

Include government document volumes that are accessible through the library’s catalogs regardless of whether they are separately shelved. “Classified” includes documents arranged by Superintendent of Documents, CODOC, or similar numbers. “Cataloged” includes documents for which records are provided by the library or downloaded from other sources into the library’s card or online catalogs. Documents should, to the extent possible, be counted as they would if they were in bound volumes (e.g., 12 issues of an annual serial would be one or two volumes). Title and piece counts should not be considered the same as volume counts. If a volume count has not been kept, it may be estimated through sampling a representative group of title records and determining the corresponding number of volumes, then extrapolating to the rest of the collection. As an alternative, an estimate may be made using the following formulae:

- 52 documents pieces per foot
- 10 “traditional” volumes per foot
- 5.2 documents pieces per volume

Include e-book units, as long as these e-books are owned or leased and have been cataloged by your library. Include electronic books purchased through vendors such as NetLibrary® or Books 24x7, and e-books that come as part of aggregate services. Include individual titles of e-book sets that are treated as individual reference sources. Include locally digitized electronic books and electronic theses and dissertations. Provide a footnote explaining how many e-books you are reporting, preferably by specifying the products and the number of titles in a note.

Include volumes purchased collectively where the cost is shared at the time of purchase.

If either formulas or sampling are used for deriving your count, please indicate in a footnote.

**Question 1b. Volumes Added.** Include only volumes cataloged, classified, and made ready for use. Include government documents if they have been included in the count of volumes on line 1a. Do not include as part of Volumes Added Gross any government documents or other collections (such as large gift collections or e-book packages, EBBO, etc.) that were added to the collection as the result of a one time download or addition to the OPAC. Include these items in Volumes Held of the previous year (Line 1a) and provide a footnote explaining the revision of Line 1a.

**Question 2. Titles Held.** Use the ANSI/NISO Z39.7-2004 definition for title as follows:

The designation of a separate bibliographic whole, whether issued in one or several volumes …. Titles are defined according to the Anglo-American Cataloging 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, audiovisual, and other library materials. For
unpublished works, the term is used to designate 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.

Report the total number of unique titles cataloged, classified and made ready for use. The number of titles reported here is for the number of volumes reported under line (1). Include e-books as specified above in question (1). For those reporting a bibliographic volume under line (1), their title count may be exactly the same as their volume count.

**Question 3. Monographic Volumes Purchased.** Report number of volumes purchased; do not include volumes received or cataloged. Include all volumes for which an expenditure was made during 2009-10, including volumes paid for in advance but not received during the fiscal year. Include monographs in series and continuations. Include e-books that fit the NetLibrary® model, i.e., electronic manifestations of physical entities and/or units; provide a footnote explaining how many e-books you are reporting, preferably by specifying the products and the number of titles. If only number of titles purchased can be reported, please report the data and provide an explanatory footnote.

**Question 4: Basis of Volume Count.** A physical count is a piece count; a bibliographic count is a catalog record count.

**PAGE TWO – OTHER COLLECTIONS**

**Questions 5. Serials.** Use the following definition adapted from AACR2 for a serial:

> A bibliographic resource issued in a succession of discrete parts, usually bearing numbering, that has no predetermined conclusion. Examples of serials include journals, magazines, electronic journals, continuing directories, annual reports, newspapers, and monographic series.

Report the total number of unique SERIAL TITLES, NOT SUBSCRIPTIONS, that you currently acquire and to which you provide access. 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. Exclude unnumbered monographic and publishers’ series. Electronic serials acquired as part of a bundle or an aggregated package should be counted at the title level, even if they are not cataloged, as long as the title is made accessible directly by the library (e.g., through a finding aid). If access is provided only through the overall platform or aggregator, do not report the individual titles but count the package as a single title.

**Question 5a. Serial titles currently purchased.** In the case of consortial agreements, count under ‘serial titles currently purchased’ those titles for which the library pays any amount from its budgeted expenditures. Include all titles that are part of bundles or aggregated packages, even if your library makes a partial payment for access to those titles. If a purchased title includes electronic access to the title, count that title ONLY ONCE (DEDUPED) as electronic only. If a database includes full-text and abstracted titles, the number of full-text titles can be counted.

**Question 5b. Serial titles: Not Purchased.** Report other titles that your library receives and does not pay for directly under ‘serial titles currently purchased’ those titles for which the library pays any amount from its budgeted expenditures. Include all titles that are part of bundles or aggregated packages, even if your library makes a partial payment for access to those titles. If a purchased title includes electronic access to the title, count that title ONLY ONCE (DEDUPED) as electronic only. If a database includes full-text and abstracted titles, the number of full-text titles can be counted.

If serial titles have been purchased through a consortium whose budget is centrally funded and independent from the library's budget, these serials should be reported under ‘serial titles currently received but not purchased.’ If within a purchased or aggregated package it cannot be determined that some titles are not purchased, report all titles as purchased.

Freely accessible titles are those your library provides direct access to via cataloging records or through online serial lists of other finding aids.

To the extent possible, report all government document serials separately in (5b.iv).

If separate counts of non-purchased and purchased serial titles are not available, report only the total number of serial titles currently purchased and received on line (5), and report NA/UA for lines (5a) and (5b).
Question 7. Microforms. Report the total number of physical units: reels of microfilm, microcards, and microprint and microfiche sheets. Include all government documents in microform; provide a footnote if documents are excluded.

Question 8. Government documents. Report the total number of physical units (pieces) of government documents in paper format that have not been counted elsewhere. Include local, state, national, and international documents; include documents purchased from a commercial source if shelved with separate documents collections and not counted above. Include serials and monographs. To estimate pieces from a measurement of linear feet, use the formula 1 foot = 52 pieces and indicate in a footnote that the count is based on this estimate. Exclude microforms and non-print formats such as maps or CD-ROMs. Adjust line (1a), i.e., last year’s Volumes Held, and provide a footnote if you are adding records to the OPAC for government documents previously held but not counted as part of Volumes Held line (1a).

Question 9. Computer files. Include 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. Exclude 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.

Question 10. Manuscripts and archives. Include both manuscripts and archives measured in linear feet.

Question 11. Cartographic materials. Include the numbers of pieces of two- and three-dimensional maps and globes. Include satellite and aerial photographs and images.

Question 12. Graphic materials. Include the number of pieces of prints, pictures, photographs, postcards, slides, transparencies, film strips, and the like.

Question 13. Audio materials. Include the number of pieces of audiocassettes, phonographic discs, audio compact discs, reel-to-reel tapes, and other sound recordings.

Question 14. Film and video materials. Include the number of pieces of motion pictures, videocassettes, video laser discs, and similar visual materials.

PAGE THREE – EXPENDITURES

Questions 15-21. Expenditures. Report all expenditures of funds that come to the library from the regular institutional budget, and from sources such as research grants, special projects, gifts and endowments, and fees for service. (For question (18), include non-library funds; see instruction for question (18). Do not report encumbrances of funds that have not yet been expended. Canadian libraries should report expenditures in Canadian dollars. (For your information, if interested in determining figures in U.S. dollars, divide Canadian dollar amounts by 1.0556, the average monthly noon exchange rate published in the Bank of Canada Review for the period July 2009-June 2010). Please round figures to the nearest dollar.

Question 16a. Monographs. Report expenditures for volumes purchased counted on line (3).


Question 16c. Other library materials. Include expenditures for all materials not reported in Questions (16a) and (16b), e.g., backfiles of serials, charts and maps, audiovisual materials, manuscripts, etc. If expenditures for these materials are included in lines (16a) and/or (16b) and cannot be disaggregated, please report U/A and provide a footnote. Do not include encumbrances.

Question 16d. Miscellaneous expenditures. Include any other materials funds expenditures not included in questions (16a)-(16c), e.g., expenditures for bibliographic utilities, literature searching, security devices, memberships for the purposes of publications, etc. Please list categories, with amounts, in a footnote. Note: If your library does not use materials funds for non-materials expenditures—i.e., if those expenditures are included in “Other Operating Expenditures”— report 0, not NA/UA, on line (16d).
Question 17. Contract Binding. Include only contract expenditures for binding done outside the library. If all binding is done in-house, state this fact and give in-house expenditures in a footnote; do not include personnel expenditures.

Questions 18. Salaries and wages. Exclude fringe benefits. If professional, support staff and student salaries cannot be separated, enter NA/UA, in lines (18a), (18b) and (18c) and enter total staff salaries in line (18).

Question 18c. Salaries and wages: Student Assistants. Report 100% of student wages regardless of budgetary source of funds. Include federal and local funds for work study students.

Question 20. Other operating expenditures. Exclude expenditures for buildings, maintenance, and fringe benefits.

Questions 22-26. Electronic expenditures. These items are intended to indicate what portion of your institution’s total library expenditures are dedicated to electronic resources and services. Please use the Footnotes to indicate any electronic materials expenditures you believe not to be covered by these questions. Many expenditures recorded in these questions should have been included in question (21), total library expenditures.

Question 22. One-time electronic resource purchases. Report expenditures that are not current serials (i.e., are non-subscription, one-time, or monographic in nature) for software and machine-readable materials considered part of the collections. Examples include periodical backfiles, literature collections, one-time costs for JSTOR membership, etc. Expenditures reported here may be derived from any of the following categories: Monographs (16a), Other Library Materials (16c), Miscellaneous (16d), or Other Operating Expenditures (20).

Question 23. Ongoing electronic resource purchases. Report subscription expenditures (or those which are expected to be ongoing commitments) for serial publications whose primary format is electronic and for online searches of remote databases such as OCLC FirstSearch, DIALOG, Lexis-Nexis, etc. Examples include paid subscriptions for electronic journals and indexes/abstracts available via the Internet, CD-ROM serials, and annual access fees for resources purchased on a “one-time” basis, such as literature collections, JSTOR membership, etc. Not all items whose expenditures are counted here will be included in Serial titles currently received question (5) or Serials Expenditures question (16b).

Question 24. Bibliographic Utilities, Networks, and Consortia. Because it is increasingly common for ARL Libraries to enter into consortial arrangements to purchase access to electronic resources, both “Library” and “External” expenditure blanks and instructions are provided. Please use a footnote to describe expenditures that you believe are not covered by the question, or situations that do not seem to fit the instructions.

Question 24a. From internal library sources. Report expenditures paid by the Library for services provided by national, regional, and local bibliographic utilities, networks, and consortia, such as OCLC and RLG, unless for user database access and subscriptions, which should be reported in questions (22) or (23). Include only expenditures that are part of Other Operating Expenditures (Q20).

Question 24b. From external sources. If your library receives access to computer files, electronic serials or search services through one or more centrally-funded system or consortial arrangements for which it does not pay fully and/or directly (for example, funding is provided by the state on behalf of all members), enter the amount paid by external bodies on its behalf. If the specific dollar amount is not known, but the total student FTE for the consortium and amount spent for the academic members are known, divide the overall amount spent by your institution’s share of the total student FTE.

Question 25. Computer hardware and software. Report expenditures from the library budget for computer hardware and software used to support library operations, whether purchased or leased, mainframe or microcomputer, and whether for staff or public use. Include expenditures for: maintenance; equipment used to run information service products when those expenditures can be separated from the price of the product; telecommunications infrastructure costs, such as wiring, hubs, routers, etc. Include only expenditures that are part of Other Operating Expenditures (20).

Question 26. Document Delivery/Interlibrary Loan. Report expenditures for document delivery and interlibrary loan services (both borrowing and lending). Include fees paid for photocopies, costs of telefacsimile transmission, royalties and access fees paid to provide document delivery or interlibrary loan. Include fees paid to bibliographic utilities if the portion paid for interlibrary loan can be separately counted. Include only expenditures that are part of Miscellaneous Materials Expenses (16d) or Other Operating Expenditures (20), and only for those ILL/DD programs with data recorded in Questions (35)-(36).
Questions 27. Personnel. Report the number of FTE (full-time equivalent) staff in filled positions, or positions that are only temporarily vacant. ARL defines temporarily vacant positions as positions that were vacated during the fiscal year for which ARL data were submitted, for which there is a firm intent to refill, and for which there are expenditures for salaries reported on line (18).

Include cost recovery positions and staff hired for special projects and grants, but provide an explanatory footnote indicating the number of such staff. If such staff cannot be included, provide a footnote. To compute full-time equivalents of part-time employees and student assistants, take the total number of hours per week (or year) worked by part-time employees in each category and divide it by the number of hours considered by the reporting library to be a full-time work week (or year). Round figures to the nearest whole numbers.

Question 27a. Professional Staff. Since the criteria for determining professional status vary among libraries, there is no attempt to define the term “professional.” Each library should report those staff members it considers professional, including, when appropriate, staff who are not librarians in the strict sense of the term, for example computer experts, systems analysts, or budget officers.

Question 27b. Support Staff. Report the total FTE (see instruction (27) of staff not included in (27a)).

Question 27c. Student Assistants. Report the total FTE (see instruction Q27) of student assistants employed on an hourly basis whose wages are paid from funds under library control or from a budget other than the library’s, including federal work-study programs. Exclude maintenance and custodial staff.

Question 28. Number of staffed library service points. Count the number of staffed public service points in the main library and in all branch libraries reported in this inventory, including reference desks, information desks, circulation, current periodicals, reserve rooms, reprographic services (if staffed as a public facility), etc. Report the number of designated locations, not the number of staff.

Question 29. Number of weekly public service hours. Report an unduplicated count of the total public service hours per typical full-service week (i.e., no holidays or other special accommodations) across both main library and branches using the following method (corresponds to IPEDS): If a library is open from 9:00 a.m. to 5:00 p.m. Monday through Friday, it should report 40 hours per week. If several of its branches are also open during these hours, the figure remains 40 hours per week. Should Branch A also be open one evening from 7:00 p.m. to 9:00 p.m., the total hours during which users can find service somewhere within the system becomes 42 hours per week. If Branch B is open the same hours on the same evening, the count is still 42, but if Branch B is open two hours on another evening, or remains open two hours later, the total is then 44 hours per week. Exclude 24-hour unstaffed reserve or similar reading rooms. The maximum total is 168 (i.e., a staffed reading room open 7 days per week, 24 hours per day).

Questions 30-31. Instruction. Sampling based on a typical week may be used to extrapolate TO A FULL YEAR for Questions (30) and (31). Please indicate if responses are based on sampling.

Question 30. Presentations to Groups. Report the total number of sessions during the year of presentations made as part of formal bibliographic instruction programs and through other planned class presentations, orientation sessions, and tours. If the library sponsors multi-session or credit courses that meet several times over the course of a semester, each session should be counted. Presentations to groups may be for either bibliographic instruction, cultural, recreational, or educational purposes. Presentations both on and off the premises should be included as long as they are sponsored by the library. Do not include meetings sponsored by other groups using library meeting rooms. Do not include training for library staff; the purpose of this question is to capture information about the services the library provides for its clientele. Please indicate if the figure is based on sampling.

Question 31. Participants in Group Presentations. Report the total number of participants in the presentations reported on line (30). For multi-session classes with a constant enrollment, count each person only once. Personal, one-to-one instruction in the use of sources should be counted as reference transactions on line (32). Please indicate if the figure is based on sampling. Use a footnote to describe any special situations.
Question 32. Reference Transactions. Report the total number of reference transactions. A reference transaction is 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. Information sources include (a) printed and nonprinted material; (b) machine-readable databases (including computer-assisted instruction); (c) the library’s own catalogs and other holdings records; (d) other libraries and institutions through communication or referral; and (e) 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 transaction is reported as a reference transaction even if the source is not consulted again.

If a contact includes both reference and directional services, it should be reported as one reference transaction. Include virtual reference transactions (e.g., e-mail, WWW form, chat). Duration should not be an element in determining whether a transaction is a reference transaction. Sampling based on a typical week may be used to extrapolate TO A FULL YEAR for Question 32. Please indicate if the figure is based on sampling.

EXCLUDE SIMPLE DIRECTIONAL QUESTIONS. A directional transaction is an information contact that facilitates the logistical use of the library and that does not involve the knowledge, use, recommendations, interpretation, or instruction in the use of any information sources other than those that describe the library, such as schedules, floor plans, and handbooks.

PAGE FIVE – PUBLIC SERVICES AND LOCAL CHARACTERISTICS

Questions 33-34. Circulation. For Question (33), count the number of initial circulations during the fiscal year from the general collection for use usually (although not always) outside the library. Do not count renewals. Include circulations to and from remote storage facilities for library users (i.e., do not include transactions reflecting transfers or stages of technical processing). Count the total number of items lent, not the number of borrowers.

For Question (34), report total circulation for the fiscal year including initial transactions reported on line (33) and renewal transactions. Exclude reserve circulations; these are no longer reported.

Questions 35-36. Interlibrary Loans. Report the number of requests for material (both returnables and non-returnables) provided to other libraries on line (35) and the number of filled requests received from other libraries or providers on line (36). On both lines, include originals, photocopies, and materials sent by telefacsimile or other forms of electronic transmission. Include patron-initiated transactions. Exclude requests for materials locally owned and available on the shelves or electronically. Do not include transactions between libraries covered by this questionnaire.

Question 37. PhD Degrees. Report the number awarded during the 2009-10 fiscal year. Please note that only the number of Ph.D. degrees are to be counted. Statistics on all other advanced degrees (e.g., D.Ed., D.P.A., M.D., J.D.) should not be reported in this survey. If you are unable to provide a figure for Ph.D.s only, please add a footnote.

Question 38. PhD Fields. For the purposes of this report, Ph.D. fields are defined as the specific discipline specialties enumerated in the U.S. Department of Education’s Integrated Postsecondary Education Data System (IPEDS) “Completions” Survey. Although the IPEDS form requests figures for all doctoral degrees, only fields in which PhDs are awarded should be reported on the ARL questionnaire. Any exceptions should be footnoted.

Question 39. Instructional Faculty. Instructional faculty are defined by the U.S. Dept. of Education as:

members of the instruction/research staff who are employed full-time as defined by the institution, including faculty with released time for research and faculty on sabbatical leave.

Full-time counts generally exclude faculty who are employed to teach fewer than two semesters, three quarters, two trimesters, or two four-month sessions; replacements for faculty on sabbatical leave or leave without pay; faculty for preclinical and
clinical medicine; faculty who are donating their services; faculty who are members of military organizations and paid on a different pay scale from civilian employees; academic officers, whose primary duties are administrative; and graduate students who assist in the instruction of courses. Please be sure the number reported, and the basis for counting, are consistent with those for 2009-10 (unless in previous years faculty were counted who should have been excluded according to the above definition). Please footnote any discrepancies.

Questions 40-43. Enrollment. U.S. libraries should use the Fall 2009 enrollment figures reported to the Department of Education on the Integrated Postsecondary Education Data System survey. Please check these figures against the enrollment figures reported to ARL last year to ensure consistency and accuracy. Note: In the past, the number of part-time students reported was FTE; the number now reported to IPEDS is a head count of part-time students. Canadian libraries should note that the category “graduate students” as reported here includes all post-baccalaureate students.

FOOTNOTES
Please consult the data entry Web interface (www.arlstatistics.org) for a copy of last year’s footnotes. These can be found under “Data Repository” after you login into www.arlstatistics.org. Explanatory footnotes will be included with the published statistics. Reporting libraries are urged to record in the footnote section any information that would clarify the figures submitted, e.g., the inclusion and exclusion of branch campus libraries (see the "General Instructions" for definition of branch campus libraries). Please make an effort to word your footnotes in a manner consistent with notes appearing in the published report, so that the ARL Office can interpret your footnotes correctly.

NOTE: Any change over 10% in any answer to any of the survey’s questions over the preceding year’s response (2008-09) should be addressed with a footnote.

Submit the completed questionnaire
By October 15, 2010.

For assistance, please e-mail Martha Kyrillidou (martha@arl.org) or Shaneka Morris (shaneka@arl.org)
Tel. (202) 296-2296.
ARL SUPPLEMENTARY STATISTICS 2009-10
WORKSHEET

Reporting Institution ____________________________ Date Returned to ARL_______
Report Prepared by (name) __________________________________________________
Title ______________________________________________________________________
Email address__________________________________ Phone number___________
Contact person (if different) _________________________________________________
Title ______________________________________________________________________
Email address__________________________________ Phone number___________

Definitions of the statistical categories used in this questionnaire can be found in the COUNTER Code of
Practice (http://www.projectcounter.org/code_practice.html) and in Information Services and Use:
Metrics & statistics for libraries and information providers--Data Dictionary, NISO Z39.7-2004
(http://www.niso.org/)

Please read all instructions carefully before you answer the questionnaire. Make sure your responses
are as complete and accurate as possible. Give estimates when you must, but please do not make wild
guesses. Use footnotes to expand upon or clarify your responses.

All questions assume a fiscal year ending June 30, 2010. If your library’s fiscal year is different, please
use footnotes to explain.

If your library does not perform a given function or had no activity for this function or if the appropriate
answer is zero or none, use 0. If an exact figure is unavailable, check NA/UA.

Please do not use decimals. All figures should be rounded to the nearest whole number.

Electronic Books

1. Number of electronic books held. (1) __________

This number is a subset of volumes held reported in Q1, in the ARL Statistics.

2. Expenditures for electronic books. (2) __________

Include annual access and service fees paid directly or through consortial arrangements. Include initial
purchase cost only for items purchased this fiscal year. Expenditures here are only for the electronic
books reported in (1).

3. Are the above expenditures reported in Canadian dollars? (3) _____ Yes _____ No
Use of Networked Electronic Resources and Services

4. Number of virtual reference transactions. (4) ____________

Virtual reference transactions are conducted via email, a library’s website, or other network communications mechanisms designed to support electronic reference. A virtual reference transaction must include a question either received electronically (e.g., via e-mail, WWW form, etc.) or responded to electronically. A transaction that is both received and responded to electronically is counted as one transaction. Exclude phone and fax traffic unless either the question or answer transaction occurs via the manner described above. Include counts accrued from participation in any local and national projects, such as DigiRef and the Library of Congress’s CDRS (Collaborative Digital Reference Service).

A reference transaction is an information contact, which involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by any member of the library staff (e.g., circulation, technical or reference services).

This number is a subset of reference transactions reported in Q32, in the ARL Statistics.

5. Does your library offer federated searching across networked electronic resources? (5) _____Yes _____No

Networked electronic resources may include any information resource, such as databases, journals, e-books, reference materials, and non-textual resources that are provided to the library’s users through licensing and contractual agreements. Include electronic resources that institutions mount locally.

6. Number of sessions (logins) to databases or services. (6) ____________

6.a. Number of resources for which you are reporting. (6.a) ____________

A session or login is one cycle of user activities that typically starts when a user connects to an electronic resource and ends with explicit termination of activities (by leaving through logout or exit) or implicit termination (time out due to user inactivity). Report here those figures that you derive from Database Report 1 and Database Report 3 in the COUNTER Code of Practice. In a footnote, please include the types of resources reported in 6a.

7. Number of searches (queries) in databases or services. (7) ____________

7.a. Number of resources for which you are reporting. (7.a) ____________

A search is intended to represent a unique intellectual inquiry. Typically, a search is recorded each time a search request is sent/submitted to the server. Report here those figures that you derive from Database Report 1 and Database Report 3 in the COUNTER Code of Practice. In a footnote, please include the types of resources reported in 7a.

8. Number of successful full-text article requests. (8) ____________

8.a. Number of resources for which you are reporting. (8.a) ____________

Items reported should include only full-text articles as defined in the COUNTER Code of Practice. Report here those figures that you derive from Journal Report 1 in the COUNTER Code of Practice. In a footnote, please include the types of resources reported in 8a.
9. **Number of virtual visits.**

9.a. **Number of virtual visits to library’s website.** (9.a) __________

9.b. **Number of virtual visits to library’s catalog.** (9.b) __________

9.c. **Excludes virtual visits from inside the library?** (9.c) ___Yes ___No

Virtual visits include a user’s request of the library web site or catalog from outside the library building excluding the number of pages or gratuitous elements (images, style sheets) viewed. Exclude, if possible, virtual visits from within the library, from robot or spider crawls and from page reloads.

A visit is usually determined by a user’s IP address, which can be misleading due to Internet Service Providers (ISPs) and Firewalls or Proxy Servers. Thus, this measure is actually an estimate of the visits.

**Library Digitization Activities**

10. **Number and Size of Library Digital Collections.**

10.a. **Number of Collections.** (10.a) __________

10.b. **Size (in gigabytes).** (10.b) __________

10.c. **Items.** (10.c) __________

Library digital collections can include born digital materials or those created in or converted from different formats (e.g., paper, microfilm, tapes, etc.) by the library and made available to users electronically. This includes locally held digital materials that are not purchased or acquired through other arrangements (e.g., vendor, individual or consortial licensing agreements). Born digital collections can include materials self-archived in an institutional repository. Created or converted digital collections can include electronic theses and dissertations (ETDs); special collections materials; maps; sound recordings; and films.

For each type of collection (e.g., subject, theme), include the size (in gigabytes) and, if possible, the number of items (e.g. digital objects or unique files) in each collection. Exclude back up copies or mirror sites since items should be counted only once. Exclude e-reserves. In the footnote, provide a paragraph describing the general nature of library digital collections and, if possible, provide the URL where collections are listed.

11. **Use of Library Digital Collections.**

11.a. **Number of times items accessed.** (11.a) __________

11.b. **Number of queries conducted.** (11.b) __________

Number of times library digital collection items (unique files) were accessed and the number of searches (queries) conducted (if there is such a capability) during the reporting period. Please explain in a footnote how library digital collections are accessed, and if possible, list the URLs of those collections.
12. Direct cost of digital collections construction and management.

12.a. Direct cost of personnel

12.b. Direct cost of equipment, software or contracted services.

Report annual direct costs (personnel, equipment, software, contracted services and similar items) spent to create digital materials (texts, images, and multimedia) or to convert existing materials into digital form for the purpose of making them electronically available to users. Include expenditures related to digitization, OCR, editorial, creation of markup texts, and preparation of metadata for access to digitized materials, data storage, and copyright clearance. Exclude expenditures for information resources purchased or acquired from outside the institution through individual or consortia licensing agreements.

Please describe any additional funding (university, state, private grants, etc.) provided specifically for the library’s digitization activities in a footnote. Also provide a footnote for any cost-recovery operations.

13. Volumes Held Collectively [i.e., Withdrawn]

The defining criterion for this number is that the library formerly devoted financial resources for the purchase of these items and is now taking responsibility for their availability through participation in a cooperative that supports shared ownership. The library may demonstrate commitment to shared ownership through a shared storage facility, or similar collaborative arrangements, by supporting a consortium financially through a legally binding arrangement. Report here volumes originally held that were withdrawn from the local collection beginning with fiscal year 2003-04. Note that this is not the number of volumes held in a shared storage facility but literally volumes withdrawn from your collection.

This number is a subset of volumes withdrawn in Q1.b.ii reported in the ARL Statistics beginning with fiscal year 2003-04. Report here the cumulative number beginning with fiscal year 2003-04.

Exclude volumes held collectively because they are held by other organizations such as the Center of Research Libraries (CRL) that are supported by membership dues and determination on whether to maintain membership may vary from year to year.

Footnotes: Please provide footnotes as requested. Consult the data entry Web interface (www.arlstatistics.org) for a copy of last year’s footnotes. These can be found under “Data Repository” after you login to www.arlstatistics.org. Please use a concise sentence/paragraph format when writing footnotes—do not use “bullets” or make a “bullet list.”

NOTE: Any change over 10% for any response to the surveys questions over the preceding year (2008-09) should be addressed with a footnote.

Submit the completed questionnaire by October 15, 2010.

For assistance, please call the ARL Office at (202) 296-2296, or e-mail Martha Kyrillidou (martha@arl.org) or Shaneka Morris (shaneka@arl.org).
Use the newly available Web form for your data submission:


  Fill in Part I on the Web and upload your file for Part II through the same interface.

  **NOTE:** You must complete the entire submission in a single session. The Web interface does **NOT** allow you to return and edit your information once it is submitted.

- **This survey is concerned with professional positions only.** Since the criteria for determining professional status vary among libraries, there is no attempt to define the term “professional.” Each library should report the salaries of those staff members it considers professionals, irrespective of faculty status or membership in a collective bargaining unit, including, when appropriate, staff who are not librarians in the strict sense of the term, such as computer experts, systems analysts, budget officers, etc.


- **Use “Percent” to determine if an employee works full-time or part-time.** All full-time employees have Percent = 1.00, i.e., they work 100% of a full-time schedule. If Percent is less than 1.00, then the employee works that fraction of a full-time schedule. For example, a 65% time appointment would be entered as 0.65. Calculate the percent appointment by dividing the amount of time an employee works by the amount considered to be the norm for full-time employment at your institution. For example, if a full-time appointment at your institution is 12 months at 40 hours per week:
  - A 9-month part-time appointment has Percent = 9/12, or 0.75.
  - An appointment at 30 hours per week has Percent = 30/40, also 0.75.
  - An appointment at 30 hours and 9 months has Percent = 0.75 x 0.75 = 0.56.

Enter Percent with two decimal points.
• Report salaries for both full-time and part-time professional positions. Salaries for part-time positions should NOT be converted to their full-time equivalents. Report the actual part-time salary paid and indicate the percent appointment for that employee in the appropriate column.

• Include salaries for all professional positions, regardless of whether the salaries come from regular library budget funds or from special funds such as research grants. Please include all professionals involved in the provision of library services, including contract-supported positions.

• The salary figures should be straight gross salary figures. Do not include fringe benefits.

• Provide explanatory footnotes to the reported figures, when necessary, at the end of Part I. Footnotes will be included in the published survey, where appropriate.

• After all data have been entered, make a backup copy of the complete file for your institution’s master file. Your backup should include individual names/ID numbers. NOTE: The data submitted to ARL should NOT include individual names/ID numbers, so ARL will NOT be able to supply a copy of your institution’s complete file next year.

• Please return the questionnaire the ARL Statistics and Assessment Program by October 1, 2010. Be sure to keep a complete copy of your return, including the electronic version of the data for your files.

INSTRUCTIONS

Part I: Summary Data (Microsoft Word Form)

1. Part I of this survey deals with general information for the current fiscal year, 2010-11.

2. Include the Beginning Professional Salary for Law and Medical libraries if included in the survey.

3. The Beginning Professional Salary is the salary that would be paid to a newly hired professional without experience, not necessarily the lowest professional salary paid. In reporting the beginning salary, please use a figure that is actually used or likely to be used for entry-level librarians hired by your library, even if it is your practice rarely to hire entry-level professionals without experience.

4. Please report the 2010-11 Beginning Professional Salary to the best of your knowledge as it exists on July 1, 2010. Do not delay returning your survey with the expectation that more information will be available later.

5. The 2010-11 Average and Median Salary figures will be calculated by ARL from the individual data supplied.
6. Be sure to fill in the name of the reporting library and the name of the person who prepares the report.

**Part II: Individual Data (Microsoft Excel Form)**

1. Part II of this survey requests information on salary, sex, minority status, rank, and years of experience for all filled positions for fiscal year 2010-11. The survey requests information for individuals; aggregate data for each institution will be generated by computer. Vacant positions should be excluded from your report.

2. Data for the Main, Law, and Medical libraries should be reported on separate Excel files.

3. **Obtain the Excel file.** These instructions assume that you have Microsoft Excel available for use. If not, or if you have trouble opening the files in Excel, please call the ARL Statistics and Assessment Program at (202) 296-2296 or email stats@arl.org.

4. The template Excel file is available at: [http://www.arl.org/stats/annualsurveys/salary/salform10.shtml](http://www.arl.org/stats/annualsurveys/salary/salform10.shtml). This is a generic, blank file that can hold data for Main, Law, or Medical libraries. The file’s name is “sal10xxxx.xls”; open the file and save it to your own computer by choosing “Save As” under the File menu. When saving the file, utilize ARL as the prefix for main library reports, use 10 to designate the year (2010-11), and change the “xxxx” in its name to your ARL institution code number, e.g., “ARL101150.xls.” Note: use MED for medical libraries, e.g. “MED101150” and LAW to denote law libraries, e.g., “LAW101150.”

   The file contains columns labeled as follows:
   - Required: Name/ID#
   - Required: LibID
   - Required: Page
   - Required: Line
   - Required: Salary
   - Required: Job
   - Required: Sex
   - Required: OEOcat
   - Required: Yrsexp
   - Required: Rank
   - Required: Percent
   - Optional: YrBirth
   - Optional: JobAdd
   - Optional: LibDeg
   - Optional: OthDeg
   - Optional: YrsLib
   - Optional: Hisp
   - Optional: NatAm
   - Optional: Asian
   - Optional: Black
   - Optional: HawPI
   - Optional: White

   In the LibID column, enter your ARL Library Institution Code. (See [http://www.arl.org/stats/annualsurveys/surveycoord/instno_inam.shtml](http://www.arl.org/stats/annualsurveys/surveycoord/instno_inam.shtml) if you do not know your code.) If you leave this column blank we will fill it in for you when we receive the data.

   Columns labeled “Page,” “Line,” and "Percent" are already filled for you. The numbers in the “Page” and “Line” columns will be used to identify these positions in case of data errors; do not change them. Eleven “pages” of 25 lines each have been provided; if this is not sufficient to list all positions at your institution, copy and paste lines 1-25 of the last page as needed.

**Entering Data for Part II: Individual Data (Microsoft Excel Form)**

1. The “Name/ID#” column is for your internal use, to enter and verify information for staff members by name. ARL does not require that you submit the information in this field to ARL. Please delete this column before sending the file to ARL. Upon receiving this file, ARL will delete any data in this column if you have not deleted them already.

2. The “LibID” will hold your institution’s ARL number, for identification purposes. If you do not know your ARL number, you can find it on the Web under ARL Library Institution Codes. If you leave this column blank, it will be filled in by ARL staff.
3. “Salary” should be entered as it existed on July 1, 2010. Please do not hold up the reporting process for later salary adjustments. Include all filled positions and exclude all vacant positions. Report the actual salary paid. Do not adjust part-time salaries to their full-time equivalents; ARL will do this during the data analysis and verification stage. Do not include fringe benefits.

4. Each position can have only one “Job” code, to be taken from the following list:

- **DIRLIB** Director of Libraries (includes Dean of Libraries and equivalent titles)
- **ASCDIR** Associate Director
- **ASTDIR** Assistant Director
- **HDMED** Head, Medical Library (Human Medicine only)
- **HDLAW** Head, Law Library
- **HDBR** Head, Other Branch Library (including Veterinary Medicine)
- **FSPEC** Functional Specialist
- **ARCH** Archivists/Curators
- **BUSI** Budget/Fiscal/Business Manager/Facilities
- **HUMRES** Human Resources/Training/Staff Development
- **ITS** Information Technology Systems
- **ITW** Information Technology Web Development
- **ITP** Information Technology Programming/Application Development
- **MEDIA** Media/Multimedia Specialists (including graphics)
- **PRES** Preservation/Conservation
- **SSPEC** Subject Specialist
- **HDACQ** Head, Acquisitions Department
- **HDCAT** Head, Catalog Department/Unit
- **HDCIRC** Head, Circulation
- **HDCOMP** Head, Library and Computer Systems
- **HDDOC** Head, Documents Department
- **HDMAP** Head, Map Room/Department
- **HDRBM** Head, Rare Book/Manuscripts Department
- **HDREF** Head, Reference Department
- **HDSER** Head, Serials Department
- **HDOOTH** Head, Other Department/Service/Agency
- **CAT** Catalogers, both general and specialized
- **REF** Reference librarians, both general and specialized
- **PUBS** Public Services, non-supervisory, except reference librarians
- **TECH** Technical Services, non-supervisory, except catalogers
- **ADMIN** Administrative and other units, non-supervisory position

The position categories used in this survey are intended to correspond roughly with the activities carried on in libraries, not with any particular pattern of staff organization or nomenclature. Please use these categories in the manner you feel best applies to your library. If any individual has responsibilities described by more than one of the above categories, choose the category that is most typical of his/her general duties.

**Associate or Assistant Director, and Head, Other Branch.** Use these codes for all persons at these levels regardless of the area of specialty. If an assistant or associate director is also head of
a department, choose the category that most reflects the general duties of the person currently in the position.

**Specialists.** These are of two kinds: Subject Specialists primarily build collections, but may also offer specialized reference and bibliographic services; Functional Specialists are media specialists or experts in management fields such as personnel, fiscal matters, systems, preservation, etc. Specialists may not be, strictly speaking, professional librarians (i.e., have an MLS). The “specialist” category would generally not be used for someone with significant supervisory responsibilities, who should instead be listed as a department head or assistant director (see also note under Assistant Department Head, below).

**Functional Specialist sub-codes.** Starting with the 2004-05 Salary Survey, the ARL Statistics and Assessment Committee adopted a proposal from the ACRL Personnel Administrators and Staff Development Officers Discussion Group to break down the Functional Specialist category. For each position which would have been labeled FSPEC prior to 2004-05, instead please use one of the eight sub-codes (ARCH, BUSI, HUMRES, ITS, ITW, ITP, MEDIA, PRES) to describe that position. If you cannot determine which sub-code to use, please use the FSPEC code.

**Department Heads.** Department Heads not specifically included in the above list should be included under the category “Head, Other Department/Service/Agency.” Head, Catalog Department should be used either for the department that handles all cataloging, or for the head of a specialized cataloging unit (e.g. copy cataloging or foreign languages). List the head of library automation and computer systems, applications, programming, etc. as HDCOMP unless that person is also an Associate or Assistant Director, in which case use the appropriate administrative code. If there is an intermediate level of management between an Associate or Assistant Director and the professionals who actually carry out the analysis, programming, etc., use HDCOMP to define that intermediate level. Professionals who carry out analysis, programming, etc., should be listed as functional specialists (FSPEC).

**Head, Acquisitions Department.** Use HDACQ for all of the following positions: (a) head of a department that is responsible for the selection of material (or management of selection activities carried out on a basis encompassing more than a single organizational unit), but not responsible for the placement of orders, payment of invoices, etc.; (b) head of a department responsible for the placement of orders, maintaining on-order files, payment of invoices, etc., but not responsible for selection decisions; (c) head of a department responsible for both the selection decisions (or coordination of selection activities) and for acquiring the material. Libraries that split these two functions between two departments should report more than one professional with the position HDACQ.

*Special note concerning Assistant Department Heads.* Assistant Department Heads who are responsible for major units and spend the bulk of their time in supervision and revision of the work of others should also be listed as “Head, Other Department/Service/Agency.” See additional subcodes below for Head, Cataloging, and Head, Other Department. However, Assistant Head positions responsible for small units or for supervision only in the absence of the head should be reported as non-supervisory or specialist positions as appropriate.

**Administrative.** Please note that ADMIN is not only for Administrative Services and related positions, but also can be applied to Public Relations/Communications,
Development/Fundraising, and all other administrative and/or professional positions which do not have a logical home elsewhere.

5. **Please indicate “Sex” with the letter M or F**, indicating male or female, respectively.

6. **“OEOCat” minority status code**, for U.S. university libraries only, should be indicated with one of the following code numbers. (Leave blank if a Canadian library):
   - 1 = Black
   - 2 = Hispanic
   - 3 = Asian or Pacific Islander
   - 4 = American Indian or Native Alaskan
   - 5 = Caucasian/Other

7. **“YrsExp,” or total years of professional experience.** For most professional staff members this will mean counting the years since the MLS degree was awarded. When counting, do not subtract interim periods when an individual was not engaged in professional library employment if these periods are short in relation to the overall professional career. Count an academic year contract period as a full year. Be sure to include professional experience in previous positions and in other institutions. The figure should be rounded off to the nearest whole number; for example, a position with 14.5 years of experience would appear as 15.

8. **Indicate “Rank” using the following system of codes:**
   - 0 The library director. Some systems also use 0 for assistant and/or associate directors.
   - 1 Lowest level in the rank structure, such as an entry-level position.
   - 2-8 Successively higher levels; for example, 5 indicates a higher rank than 2.
   - 9 Rank cannot be determined, or, the individual is outside the organization’s rank structure.

Responses concerning rank should be limited to professional librarians, and other professionals who occupy the same ranks as librarians. Leave the rank column blank for professionals who do not occupy these ranks or if the column is not applicable. For example, if the Library Business Officer holds a rank typically used for university administrators but not for librarians, do not supply a rank code for that individual, even if you have included salary and other data.

If multiple ranking structures are used for librarians and these structures are substantially different and not equivalent, enter individual rank information only for that group which represents the largest fraction of “rank-and-file” librarians.

The maximum number of ranks reported here should not exceed the maximum number of rank-levels reported in Part I for individual data under Rank structure. When counting the total number of rank levels, include ranks that may be unoccupied at the present time due to circumstances like unusually high turnover, hiring freezes, etc.

9. **“Percent”** is used to determine if an employee works full-time or part-time. All full-time employees have Percent = 1.00, i.e., they work 100% of a full-time schedule. If Percent is less than 1.00, then the employee works that fraction of a full-time schedule. For example, a 65% time appointment would be entered as 0.65. Calculate the percent appointment by dividing the amount of time an employee works by the amount considered to be the norm for full-time.
employment at your institution. For example, if a full-time appointment at your institution is 12 months at 40 hours per week:
  o A 9-month part-time appointment has Percent = 9/12, or 0.75.
  o An appointment at 30 hours per week has Percent = 30/40, also 0.75.
  o An appointment at 30 hours and 9 months has Percent = 0.75 x 0.75 = 0.56.
Enter Percent with two decimal points.

Optional Questions: (Shown on printed forms as the last 11 columns)

1. Year of Birth (YrBirth). For each individual, record the four-digit year of birth.

2. Position Code Addenda (JobAdd). Use this column to provide additional information only for the following position categories:

   a. Associate and Assistant Directors (ASCDIR and ASTDIR). For each category, indicate if the person has a defined area of responsibility using the codes below. Use the code that most closely reflects the general duties of the person in the position.

      Administrative Services ADM
      Collection Development CDV
      Other (or unspecified) OTH
      Public Services PBS
      Systems/Automation SYS
      Technical Services TS

   b. Head, Other Branch Library (HDBR). Use the codes below to indicate the subject area of the branch:

      Humanities/Fine Arts HFA
      Other OTH
      Science & Tech. SCI
      Social/Behavioral Sci. SBS
      Undergraduate Library UGL

   c. Functional Specialists (FSPEC). Indicate any non-supervisory staff who are primarily responsible for the following activities using the codes below:

      Acquisitions ACQ
      Development Officer DVP
      Interlibrary Loan ILL
      Marketing/Communications COM
      Serials SER

   d. Subject Specialists, Reference Librarians, Catalogers, and Public Services (SSPEC, REF, CAT, PUBS). Use these codes to indicate non-supervisory main and/or branch library staff who specialize in one of the following subject areas (either a sub-field, or the entire area). Do not add codes for staff in these positions who have broader, other, or mixed subject responsibilities (e.g. more than one field specialty); but do include subject specialists who also have some (i.e. 50% or less) general or other assignments.

      Humanities/Fine Arts HFA
      Science & Tech. SCI
Social/Behavioral Sci.  SBS  
Undergraduate Library  UGL

e. **Head, Cataloging Department/Unit** (HDCAT). Use the codes below to indicate whether the person is the head of the entire cataloging department for the library, or the head of a specialized unit. If the person is head of the whole department, repeat the same HDCAT code as in the earlier column.

- Head, all cataloging  HDCAT
- Head, copy cataloging  HDC
- Head, foreign languages  HDF
- Head, non-book formats  HDN
- Head, serials cat.  HDS
- Head, other special cat.  HDO

f. **Head, Other Department/Service/Agency** (HDOTH). For heads of departments not given a separate category in the major list, please add one of the following codes:

- Audio Visual/Media  AVM
- Archivist  ARC
- Business/Personnel Office  BPO
- Other  OTH
- Interlibrary Loan  ILL
- Preservation  PRS

3. **Library degrees earned (LibDeg).** Use the following codes to indicate the highest academic degree earned in the field of librarianship:

   - 0  None
   - 1  Bachelor
   - 2  Master
   - 3  CAGS (6th yr. certificate)
   - 4  Doctorate (Other than Ph.D.)
   - 5  Ph.D.

4. **Other degrees earned (OtherDeg).** Use the following codes to indicate the highest degree earned in fields other than librarianship, including basic undergraduate education:

   - 0  None
   - 1  Bachelor
   - 2  Master
   - 3  Second Master (i.e., 2 subject fields)
   - 4  CAGS (6th-year certificate)
   - 5  LLB/JD
   - 6  Doctorate (Other than Ph.D.)
   - 7  Ph.D.

5. **Years of professional experience at reporting institution (YrsLib).** Use this line to report the number of years of professional experience each librarian has had at your institution. This figure should not exceed the number reported as Total Years of Professional Experience on the main part of the form.
6. Please complete as much of this section as possible (US libraries only), but do not hold up the reporting process if some of the data requested are not available. Canadian libraries should leave these columns blank. The major change in the revised standard for the classification of federal data on race and ethnicity is that now respondents are able to report more than one race by choosing multiple responses to the following questions.

**Race and Ethnicity:** The U.S. Office of Management and Budget has revised the Standards for the Classification of Federal Data on Race and Ethnicity and according to the new standard there will be five minimum categories for data on race (American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White) and one category for data on ethnicity (“Hispanic or Latino”). **Respondents will be able to report more than one race by choosing multiple responses to the race question.** The purpose of the revised classification is to reflect the increasing diversity of the U.S. population that has resulted primarily from growth in immigration and in interracial marriages. The new standards were used by the Bureau of the Census in the 2000 decennial census.\(^1\) In light of these developments, we are collecting the new classification on race and ethnicity in the ARL Annual Salary Survey on an optional basis.

**Ethnicity** should be indicated by coding 1 to indicate if the person is of Hispanic or Latino ethnicity, and coding 0 otherwise. The definition of Hispanic or Latino ethnicity is: A person of Cuban, Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race.

**Race** should be indicated for U.S. university libraries only, by choosing one or more responses among the five racial categories provided here; 1=yes and 0=no. You can select multiple racial categories for a person. The definitions of the five racial categories, listed with their respective column names, are:

- American Indian or Alaska Native (NatAm): A person having origins in any of the original peoples of North and South America (including Central America) who maintains tribal affiliation or community attachment.
- Asian (Asian): A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- Black or African American (Black): A person having origins in any of the black racial groups of Africa.
- Native Hawaiian or Other Pacific Islander (HawPI): A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- White (White): A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

\(^1\) [http://www.census.gov/population/www/socdemo/race/racefactb.html](http://www.census.gov/population/www/socdemo/race/racefactb.html)
Submitting the Data for Part I and Part II on the Web

ARL is using the online services of FormStack to collect the data. As part of its privacy policy, FormStack pledges not to sell any collected information to third parties. For the complete FormStack privacy policy, visit [http://www.formstack.com/privacy.html](http://www.formstack.com/privacy.html). ARL also accepts Part I and Part II of the salary survey by e-mail from those users who may be uncomfortable submitting the files in FormStack:

- **University Libraries:** [http://www.formstack.com/forms/?987723-c6BynijupA](http://www.formstack.com/forms/?987723-c6BynijupA)

Be sure to have the electronic copy of your completed salary survey Excel file handy as you will be submitting this file via the FormStack Web form. In addition to the completed Excel file, be prepared to provide the following information as well:

- The name, title, email and phone number of the person who prepared the Excel file. The name, title, email and phone number of your institution’s contact person for the salary survey (if different from the person who prepared the Excel file)

- Indicate whether you are submitting salary information for one or more of the following: Main, Law, or Medical library, and the beginning professional salary and rank structure for each.

- **For professional salary** list the salary that would be paid to a newly hired professional without experience (even if local practice discourages hiring entry-level professionals without experience). Please report the 2010-11 beginning professional salary to the best of your knowledge as it existed on July 1, 2010.

- **For rank structure**, list the number of unique levels in your institution’s rank structure. If you have no levels in your rank structure, use 1. The number reported here should be equal to the highest number in the “Rank” column of your Excel file (i.e., the number of levels reported in your Excel file should equal the number of levels reported here).

- The names of the libraries that are included and excluded in your figures for the ‘general libraries’ (these can be main campus libraries or branch campus libraries), as well as any other explanatory information, should be indicated in a footnote. In your footnotes, report any information that would clarify the figures submitted: the inclusion and exclusion of branch campus libraries, a reporting date that is sooner/later than July 1, 2010, etc. Please make an effort to word your footnotes in a manner consistent with notes appearing in the published report, so that ARL can interpret your footnotes correctly.

Please return the completed questionnaire to the ARL Statistics and Assessment Program by **October 1, 2010**.

For assistance, contact Martha Kyrillidou ([martha@arl.org](mailto:martha@arl.org)), Shaneka Morris ([shaneka@arl.org](mailto:shaneka@arl.org)), Gary Roebuck ([gary@arl.org](mailto:gary@arl.org)) or David Green ([david@arl.org](mailto:david@arl.org)).

Tel: 202-296-2296 or Fax: 202-872-0884.

ARL ANNUAL SALARY SURVEY 2010-11

UNIVERSITY LIBRARY QUESTIONNAIRE

Note: This is a copy of the form that you will submit electronically at:
http://www.formstack.com/forms/7987723-c6ByniupA

Part I: Summary Data

Reporting Institution ____________________________________________  Date Returned to ARL _________
Report Prepared by (name) _____________________________________________________________________________
Title _______________________________________________________________________________________________
Email address __________________________________________________ Phone number ______________________
Contact person (if different) ___________________________________________________________________________
Title _______________________________________________________________________________________________
Email address __________________________________________________ Phone number ______________________

(Note: ARL will calculate the 2010-11 median and average professional salaries for your library from the individual data you supply in Part II (Excel form) of this questionnaire.)

1.  Beginning Professional Salary  

<table>
<thead>
<tr>
<th></th>
<th>Main</th>
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<td>Beginning professional salary for 2010-11</td>
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(Note: The Information shown below must be completed for all three branches (i.e. Main, Law and Health Science Libraries) in Part 1 of the online form).

2.  Rank Structure.

Indicate the number of levels in your institution’s rank structure for professional librarians. You should report here the maximum number of rank levels, reported in Part II for individual data, under the Rank column.

   _____ 1 level (i.e., no differentiated levels)  
   _____ 2 levels  
   _____ 3 levels  
   _____ 4 levels  
   _____ 5 levels  
   _____ more than 5 levels (please specify the number of levels: _____)
3. FOOTNOTES

3a. Please list which libraries are included in the data submitted for the "general" libraries. These can be main campus libraries or branch campus libraries.

3b. Please list which libraries are NOT included in the data submitted for the "general" libraries. These can be main campus libraries or branch campus libraries.

Please indicate any other explanatory information in footnotes. These additional footnotes, if necessary, should be placed in the space below or on attached pages.

Please submit the completed questionnaire to the web form at:
http://www.formstack.com/forms/?987723-c6BynijupA
by October 1, 2010.

For assistance, contact Martha Kyrillidou (martha@arl.org), Shaneka Morris (shaneka@arl.org), Gary Roebuck (gary@arl.org) or David Green (david@arl.org).
Tel: 202-296-2296 or Fax: 202-872-0884
## Part II: Individual Data

Note: This is a copy of the Excel form that you will submit electronically at:


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Duplicate this sheet if you need additional lines. Please return to the ARL Statistics and Measurement Program by October 1, 2010.

For assistance, contact Martha Kyrillidou ([martha@arl.org](mailto:martha@arl.org)), Shaneka Morris ([shaneka@arl.org](mailto:shaneka@arl.org)), Gary Roebuck ([gary@arl.org](mailto:gary@arl.org)) or David Green ([david@arl.org](mailto:david@arl.org)).

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