

Commentary on the 2000-2001 CARL Statistics: An Introduction and Retrospective Overview

General Observations:

As stated before in previous editions of the *CARL Statistics*, there are inherent problems associated with making inter-library comparisons based solely on the numbers presented in this volume. Libraries tend to count what can be readily counted: mostly input measures such as expenditures, staffing and collection size. Measuring what matters: *the frequency with which the patron gets what they want, when they want it, at the lowest possible cost to patron and institution*, is not easily done. There is an increasing body of empirical research concerning student satisfaction with various university services, including library services (e.g. the work of the Canadian Undergraduate Survey Consortium), but not yet a comprehensive and consistent user satisfaction survey of all CARL libraries that could serve as a valid performance indicator.

In using the numbers in this volume, the reader should be aware of the uncertainties associated with some of the measures. Despite the best efforts of the compilers, local interpretations of the statistical definitions at the point of collection may vary slightly. As well, numbers such as collection counts are nearly always based on estimates, since conducting a detailed inventory of a research library is a herculean task, rarely attempted.

Nevertheless, the numbers presented do represent the best available data for making comparisons between Canadian research libraries and can yield valid comparisons especially when compared to overall university expenditures or student enrolments. As well, year over year comparisons of the same measure, or ratios of measures, for a given library should yield valid information about changes in that library. Taken as a whole, the 31 years of CARL statistics represent an invaluable picture of the changes in Canadian research libraries over a period of tremendous growth in Canadian universities and their constituent libraries.

In an attempt to improve the validity, comparability and usefulness of the annual statistics, CARL modified and extended its annual statistical questionnaire for the 1996-97 statistics published in May 1998. The present publication represents the fifth annual statistical report using these new definitions and the third to contain a textual commentary. Some data elements in the current statistics were not collected in earlier years and some definitions have been altered, particularly those relating to serials. Consequently, retrospective comparisons with earlier data either cannot be made, or must be made with care.

When comparing data, particularly averages, over a number of years, it is only valid to do so for libraries that consistently reported data in the same categories for the years in question.

It is with the above provisos in mind that the reader should use the information presented in this publication. The reader is also referred to the companion volume, *CARL 1999-2000 Ratios*, which present data relating selected library statistics to overall university expenditure and enrolment.

1.0 EXPENDITURES

1.1 Collections Expenditures

(See Expenditures, Table V – Library materials expenditures in 2000-2001)

Total library materials expenditures increased in 2000-01 compared to 1999-00 in 25 out of 29 CARL libraries. Expenditures fell at Queen's, Waterloo, Windsor and CISTI. For all CARL libraries, total materials expenditures (excluding contract binding) increased on average from \$6.12 million to \$6.34 million: a healthy increase of 8.4%. (The overall Consumer Price Index increased by 3.0% from May 2000 to April 2001.)

In 2000-01 the libraries together spent a total of \$192.4 million on library materials (plus another \$3.7 million on contract binding).

The picture is more mixed for print monograph expenditures. Among the CARL libraries, 9 of 29 reported a decline in expenditures on print monographs between 1999-00 and 2000-01, although the average expenditure for all libraries rose from \$1.45 million to \$1.57 million. Toronto reported monograph expenditures of \$8.51 million, more than twice the next largest spender in this category: Alberta at \$3.93 million. Compared to the previous year, Regina more than doubled expenditures in this category: from \$0.40 million to \$0.92 million. New Brunswick spent the least on printed monographs: \$0.39 million, up from \$0.29 million the year before.

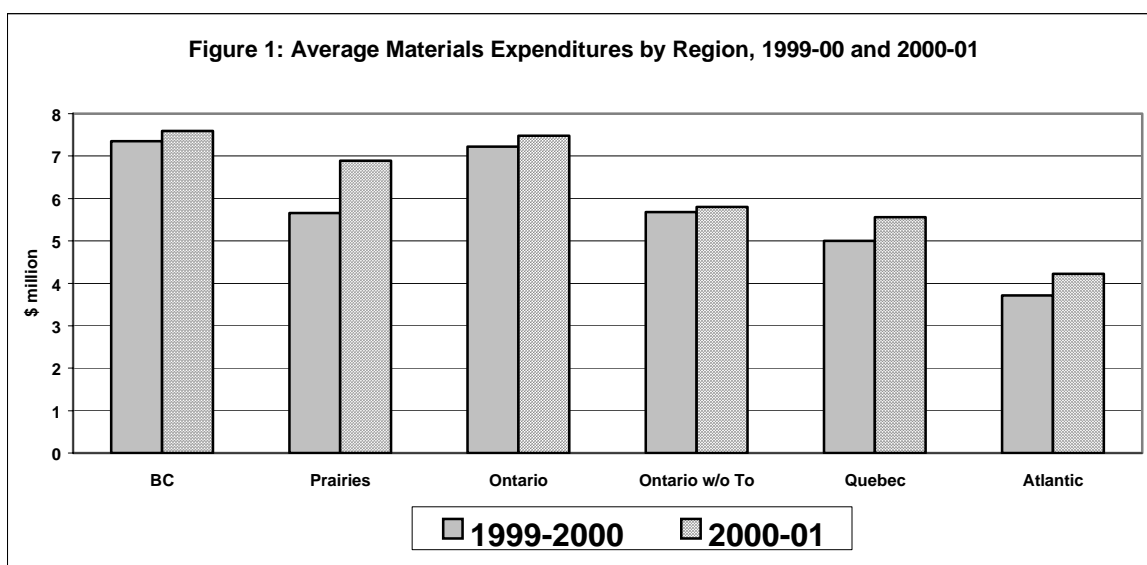
Reporting for the category of electronic monographs is rather spotty. For those reporting data in this category for both 1999-00 and 2000-01 expenditures mostly declined. Expenditures were small in all libraries except Alberta, Calgary and Toronto.

Expenditures on print serials increased in 21 of the 28 CARL libraries reporting data for 1999-00 and 2000-01. (CISTI, last year's second biggest spender, did not report data for 2000-01). However, average expenditure on print serials actually fell slightly in Ontario due to declines at Carleton, Guelph, Waterloo and Windsor. The overall national average expenditure on print serials was \$3.62 million, not including CISTI.

Average national expenditures on electronic serials were \$1.01 million for those libraries reporting. Of the 23 libraries reporting data in both years, expenditures rose in 19. UBC was the leading spender in this category (\$2.85 million), slightly ahead of Toronto (\$2.30 million). Altogether the 23 libraries reporting spent a total of \$25.3 million on electronic serials, a significant increase from the year before. Significantly, in all but two (Waterloo and New Brunswick) of the libraries reporting a drop in print serial expenditures, electronic serial expenditures increased.

The national pattern of overall library materials expenditures remained relatively unchanged from the previous year. The highest average regional library expenditure was in BC (\$7.59 million), followed by Ontario (\$7.48 million), the Prairies (\$6.89 million), Québec (\$5.56 million) and the Atlantic (\$4.22 million). As in 1999-00, Toronto had the largest materials expenditure (\$22.6 million), well ahead of UBC in second place (\$12.44 million) and Alberta (\$12.41 million). CISTI (\$11.73 million) dropped from third to fourth place from the year before. New Brunswick (\$1.99 million) reported the lowest materials expenditures falling behind Regina (\$2.49 million). The National Library, which receives most of its collection through legal deposit, spent \$2.65 million on materials.

Figure 1 shows the variation in average library materials expenditures (excluding contract binding) by region compared to the previous year.



1.2 Overall Expenditures

(See Expenditures, Table VI - Summary of library expenditures in 2000-2001)

When all expenditures are factored in (materials, staff and other operating costs) CARL libraries reported an average overall expenditure of \$18.53 million in the 2000-01 fiscal year. This is up from \$17.71 million in the previous year, an increase of 4.6% - slightly more than the CPI. Of the 29 member institutions, 7 reported a year-over-year decrease in expenditures. Toronto continues to lead in total expenditures, spending a whopping \$65.01 million. This is almost enough to run the entire University of Regina. Of the universities, UBC (\$33.21 million) and Alberta (\$29.00 million) are next in overall expenditures. However, CISTI (\$41.94 million) and the National Library (\$37.30 million) both spent more than UBC, reflecting the many other activities of these national institutions. (It should be noted that a large part of CISTI's expenditures are offset by revenue from the sale of products and services.)

In 2000-01 CARL member institutions expended 52.55% of their total on salaries, 36.51% on material and 10.94% on other operating expenses. In 1999-00 the percentages were 53.05%, 35.26% and 11.69% respectively. Variations by region are not great, but Québec continues to spend the highest proportion of overall expenditures on salaries (58.12%). This is offset in Québec by the lowest proportion of expenditures on general operating (4.82%). The Atlantic region maintains the greatest proportion of expenditures on library materials (41.62%). Of the universities, McMaster has the distinction of spending the highest proportion on library materials – 48.94%. At the other end of the scale, UQAM spends 29.70% of every dollar on materials.

1.3 Salaries and Employment

(See Expenditures, Table V- Salary and other operating expenditures in 2000-2001 and 2001-02 Salary Survey tables)

As noted above, and continuing a trend started several years ago, expenditures on staffing continued to drop slightly as a percentage of total library expenditures. However, in absolute terms, average expenditures on salaries and fringe benefits increased slightly in every region. For all members the average salary expenditure was \$9.74 million, up from \$9.40 million the year before.

For 24 university libraries reporting, 5 showed a decrease in expenditures on professional staff and 4 showed a decrease in expenditures on support staff; 13 of 26 university libraries reporting data spent less on casual staff than the year before.

In 2000-01, the number of FTE professional librarians on staff at CARL libraries averaged 45.2, up a shade from 45.1 the year before. However the total number of professional staff increased on average from 56.6 to 57.1, continuing the trend of previous years. The average number of support staff FTE declined slightly from 130.7 to 130.0. The number of casual staff FTE declined from 25.1 to 24.0. Total average FTE staff numbers remained almost the same at 210.3 per institution. It appears that there has been at least a temporary pause in the decline in employment of professional librarians and permanent support staff and the shift towards increased use of casuals.

The 2001-02 salary survey shows that the average length of professional experience for the professional staff of CARL university libraries has dropped slightly (by 0.32 years) compared to the year before. There is also a 0.21-year drop in the average experience in the reporting library. These numbers reflect a slow but continuing trend towards the renewal of the professional workforce: something observed last year. Nevertheless with an average professional career experience of 18.95 years (14.70 years in their current institution), the CARL professional staff could still use some continuing renewal. The picture varies across the country. Ottawa appears to have the oldest professional staff with an average professional experience of 23.74 years, while Laval has the longest-serving professionals: 21.81 years with their current employer.

While median and average professional salaries do not vary greatly by region, they do vary significantly between individual institutions. Carleton reports the highest average (\$77,394) and median (\$82,072) professional salary. Western Ontario reports the lowest average (\$54,284) and median (\$52,235) professional salaries. York and UQAM report the highest average salaries for administrative librarians, while York and Carleton report the highest average salaries for non-administrative librarians. Although data is incomplete, there seems to be a significant difference between the salaries of non-administrative librarians and other professional staff, with the non-librarians earning an average of \$10-15 thousand less.

Despite some indications of a gradual renewal of the CARL professional staff, there were 185 professionals in CARL university libraries earning more than \$80,000 in 2001-02, compared to 122 the year before and 110 the year before that. Those universities that have close linkages between the faculty and librarian contracts, such as Carleton and York, have proportionally the largest number of highly paid non-administrative staff.

2.0 COLLECTIONS

(See Expenditures, Tables I to III)

With the exception of Simon Fraser, all CARL institutions added more volumes than they withdrew from their collections in 2000-01. Net additions ranged from 399,113 at the National Library and 173,146 at

Toronto to 9,042 at Montréal. Total collection sizes grew by over 1.2 million volumes (some institutions report volume counts differently – please refer to the footnotes).

In terms of overall collection size at the end of the reporting period, Toronto continues to house Canada's largest collection with 9.35 million volumes. Alberta (5.62 million) and UBC (4.17 million) have the next largest university collections. The National Library houses a collection of 7.67 million volumes. CISTI reports only a bibliographic count, as it does not generally bind its largely serial collection, making comparisons difficult. McGill's collection of 3.24 million volumes is also a bibliographic count.

Last year we reported an increasing ratio between the collections of the three largest university collections (Toronto, Alberta and UBC) and the three smallest (UNB, Sherbrooke and Regina). Nevertheless, there does appear to be a continuing divergence in size between Canada's largest research libraries and their smaller counterparts – the inevitable consequence of their huge differences in purchasing power.

Of the 22 university libraries that consistently reported data for monograph purchases in the three years 1998-99, 1999-00 and 2000-01, the average number of monographs purchased increased steadily from 22,916 to 23,508 to 24,843. This reinforces the statement made last year that the previous trend of sacrificing the monograph budget to protect the serials collection has ended for the time being. This could well be the result of the influx of external money into electronic serials provided through the Canadian National Site Licensing Project (CNSLP).

It is difficult to make direct comparisons between types of serial subscriptions in 2000-01 and previous years, due to changes in definitions and their interpretation. The average CARL university library received 11,811 "hard copy" (print and microform) serial titles, both purchased and not-purchased. At the same time the average university library received (under bibliographic control) 4,786 electronic titles. Toronto has the largest number of current serial titles in hard copy format (31,418) followed closely by Alberta (30,308). The National Library with 37,060 current serials has the largest number of current hard copy serial titles in Canada. At the other end of the spectrum, Regina receives 3,534 hard copy serial titles.

Toronto receives by far the largest number of electronic serial titles (14,053), followed by York (8,587). The smallest number of electronic serial titles is received by Ottawa (1,095 current titles). It is difficult to compare numbers with previous years because of changes in reporting, but it is clear that there has been a remarkable increase in the number of electronic titles received over the last few years. For the first time, four CARL libraries reported receiving a greater number of electronic serial titles than hard copy titles in 2000-01 and electronic titles now make up a significant proportion of serial collections in all CARL university libraries. The shift towards a mostly electronic serials collection is well under way at CARL institutions.

The rate of serial cancellation has eased considerably compared to recent years. In 1999-00 six libraries reported cancelling more than 500 titles each. Of these, two libraries cancelled more than 1,200 titles. In 2000-01, only one library (Manitoba) reported more than 500 cancellations. At the same time, the annual dollar value of serials cancelled has declined substantially. Nevertheless some libraries are still making substantial cuts to their serial expenditures through cancellations. In 2000-01, Carleton reported the highest value of serial cancellations (\$631,543 for 388 titles), followed by Windsor (\$527,790 for 416 titles).

It should be noted there are several variables to keep in mind when interpreting the numbers reported for serial collections (*Expenditures, Table III – Serials Collections*). Frequently, libraries are obliged to purchase both electronic and print versions of the same title. Many government publications are received "on deposit" in electronic and print format. As well, libraries receive bundled packages of electronic

titles from a variety of vendors. Some of these bundles may include titles that are not needed, e.g. medical titles in universities without medical schools. Finally, there is a myriad of free serial material available on the Web. Some libraries attempt to systematically select such free material and provide some form of bibliographic control, thus inflating their electronic serial holdings relative to a library that does not do this - although the same material is actually available to anyone.

3.0 INTER and INTRA-LIBRARY LENDING ACTIVITY

(See Document Delivery questionnaire for the year 2000-2001, Tables I-V)

3.1 Inter-Institutional Document Delivery

This is an area of library activity that has benefited from technology in recent years. All but two libraries (Toronto and Western) report using Inter-Library Loan (ILL) software for borrowing, and all but two (Toronto and Montréal) use ILL software for lending. There are several products being used, however, Aviso remains the most common.

Apart from the traditional paper form, 13 of the 27 universities allow users to place an ILL request by email and 22 allow the use of a Library Web page. Six libraries allow the user to place a request by telephone and 16 accept requests by Fax. Four libraries support the entering of requests via the integrated library system. Fifteen university libraries support automatic parsing of electronic requests into their ILL management package.

Most, although not all, university libraries support communication with users through email, Web, telephone and Fax. Three support user communication through the ILS. Five libraries allow the user to view the status of their ILL request online.

Fee policies vary. For the provision of photocopies from other libraries to their users, 18 CARL universities charge a user fee. Twelve charge a flat fee; the rest charging a fee that varies with the amount of copying provided, or with the type of user. For the provision of originals, 13 libraries charge users a fee, of which 7 charge a flat fee.

Only 4 university libraries place a limit on loan requests from faculty members. The same four libraries also limit loan requests from graduate students. Seven libraries limit loan requests from undergraduates.

A few institutions allow document suppliers to deliver material directly to the requesting end user, but generally libraries retain their position as intermediary in the process of document delivery from outside suppliers.

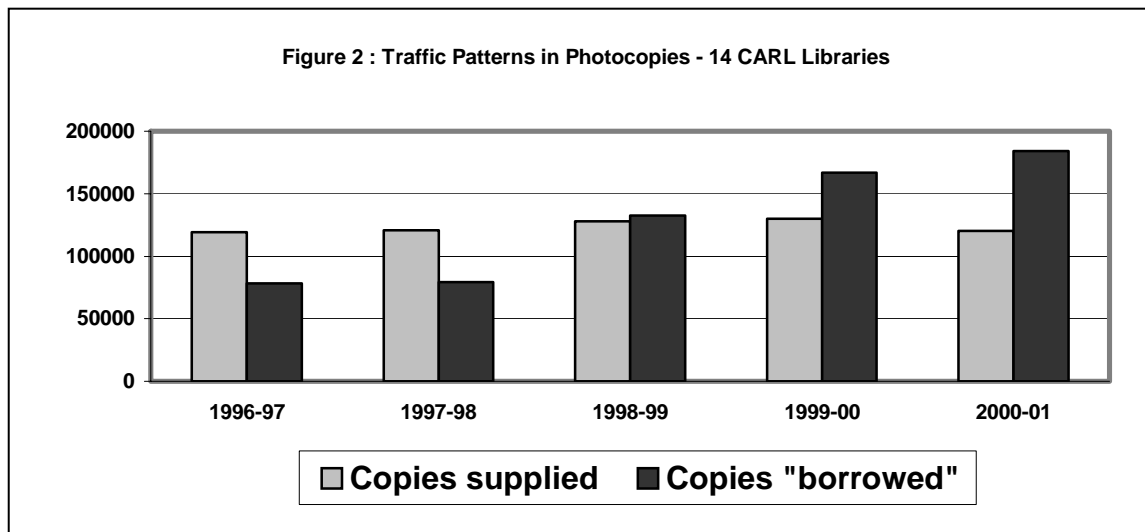
Only Manitoba and Sherbrooke claim not to have a contract with an outside document delivery supplier. CISTI is the major document delivery supplier cited.

When dealing with requests from other institutions, Alberta reported filling the largest volume (103,442). Calgary (56,783) and Waterloo (53,927) were in second and third place. CISTI, the national document delivery centre for science, reported filling 791,780 requests. Not surprisingly, traffic was much lower from the smaller CARL libraries, with Sherbrooke filling only 3,279 requests.

On the other side of the coin, Guelph was the biggest importer of material, reporting 61,735 incoming filled requests. Simon Fraser (42,333) and Alberta (39,481) were the second and third largest importers.

Not surprisingly, the country's largest library and largest research university, Toronto, was relatively self-sufficient importing only 9,692 documents from other institutions.

Figure 2 shows graphically the "balance of trade" in photocopies for a representative sample of CARL university libraries that have reported consistently over the five year period (Ontario and Québec minus Toronto and Sherbrooke). It shows the number of copies received (from other institutions and document delivery suppliers) versus the number supplied over the last 5 years. As a reflection of their declining ability to stock the journals needed by their clientele, libraries are increasingly relying on external sources for photocopies. At the same time there is no indication yet that the wider availability of electronic journals is dampening this demand for hard copy document delivery.



Traffic is, however, declining in the supply of photocopies to other institutions. This is probably a reflection of the success of CISTI and other document delivery suppliers in offering one-stop shopping to libraries.

3.2 Intra-Institutional Document Delivery

Increasingly CARL libraries are getting involved in delivering documents pro-actively to the end users on their campuses from their own collections. Twelve of the 27 university libraries deliver copies to users. Ten also deliver originals. 50% of libraries offer the service to all users, while the other 50% limit the service to specific groups of users. Four libraries offering such services charge a fee. A variety of communication channels are used to place service requests.

Generally traffic volumes for intra-institutional services are light. However, UBC is an exception, reporting the delivery of 41,230 copies and 2,384 originals.

4.0 EMERGING SERVICES

(See Emerging Services questionnaire for the year 2000-2001)

The tables on “emerging” services are largely self-explanatory and need little commentary. Some interesting items to note are:

Only one university (McGill) collects a distinct student fee for library services.

One interesting new question describes the “Chapters” phenomenon of opening coffee shops in libraries. Ten CARL university libraries provide a coffee shop in the library building and 8 have coffee shops in the library itself. Five of the 8 library coffee shops give the library a share of the profits.

Five libraries lend laptop computers and three lend wireless Ethernet cards for roaming online access to the campus network.

Only one library (Windsor) lends E-Book readers and, to date, none lend PDA’s.

5.0 LIBRARY USE

(See Supplementary Questionnaire for the year 2000-2001)

There have been several changes to definitions and categories for circulation over the last few years. It appears that total circulation transactions (excluding reserves) are down compared to the year before in 17 of the 26 CARL libraries reporting data. Last year, 15 of 27 reported a decline in circulation. It would appear that a long-term decline in circulation transactions per capita is being observed, which is consistent with increasing access to information in electronic form, either from the library or from public sources.

The same appears to be true with respect to reserve circulations. These numbers are down compared to the year before in all but 4 libraries reporting – a continuation of last year’s trend. It is suggested that once again electronic sources and the prevalence of copyright-cleared coursepacks are the likely cause.

In-house use of materials has always been notoriously difficult to measure. The numbers, however, indicate a decline in in-house use of library materials in 14 of the 20 CARL university libraries compared to the year before. For example the drop was 8.2% at Calgary, 7.4% at Toronto and 6.7% at Montréal. A similar decline was observed last year. The numbers seem to suggest that some users are substituting the use of electronic sources outside the library for the use of the library’s physical collection.

6.0 SERVICE HOURS AND REFERENCE TRANSACTIONS

(See Supplementary questionnaire for the year 2000-2001)

The average number of hours of service per week offered by CARL university libraries was 94 in 2000-01, compared to 91.7 the year before and continuing an upward trend. In contrast the average weekly service hours of the National Library and CISTI was 41.

The university libraries offered service at an average of 19 staff service points, again a slight increase from the year before (18.5).

Despite these increased service offerings, reference transactions continued their annual decline. Compared to the year before, these transactions were down in 22 of 27 CARL university libraries, a phenomenon observed last year. This trend would indicate that the Internet seems to be displacing one of the traditional functions of a library.

7.0 DATA SERVICES

(See Data Questionnaire for the year 2000-2001, Tables I and II)

The present edition of the CARL Statistics includes, for the first time, the results of a questionnaire on data library services. These services were put in place largely as a result of the “Data Liberation Initiative” (DLI) through which large amounts of government statistical and geo-spatial data are made available to libraries.

All CARL university libraries except UQAM report having such a service. CARL Libraries devote considerable resources to this new type of service with an average commitment of 0.99 professional and 0.77 support staff members per library. Usage figures are hard to measure and incompletely reported, but of those reporting, Toronto (2,819) and Carleton (4,158) report the highest number of consultations.

All CARL university libraries are participating in the DLI. All but 4 university libraries are members of the Michigan-based ICPSR (Inter-University Consortium for Political and Social Research) data consortium.

Nine of the CARL university data libraries did not deal with geo-spatial (mapping) data. The others included this type of data.

CISTI and the National Library did not operate a data library and do not participate in the DLI.

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