



IFLA Section “Libraries Serving Persons with Print Disabilities”

IFLA Section “Statistics and Evaluation”

# Key Performance Indicator Handbook for Libraries Serving Print Disabled People

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## 1. Introduction: Why a specific set of indicators for Libraries for Print Disabled Persons?

Libraries serving print disabled persons have long recognised the importance of measuring performance. The IFLA professional report “Libraries for the blind in the information age: guidelines for development” (IFLA, 2005. IFLA professional report no. 86) recommends performance measurement as a tool for demonstrating value, decision making and planning. Nevertheless, while there is some evidence of data being collected in some organisations, it has proved hard for libraries serving print disabled people to compare performance. Evidence of this situation is provided by the difficulties encountered by previous LPD sponsored projects: the international benchmarking project START in 2005 (Project START, 2006) and the international study of governance and funding of libraries for the blind carried out in 2007 (Funding and governance of library and information services for visually impaired people: international case studies. Rightscom, 2007). The first recommendation of the latter study was that

*“Service providers should make it a priority to improve the level of knowledge and understanding of how well services are performing by developing accurate comparable measures – including measures of the actual experience of users (addressed particularly to: service providers and IFLA).”*

The difficulties are in part due to the different functionality and customer requirements of libraries serving print disabled people compared with other kinds of libraries. For example, many specialist libraries for print disabled people also have significant book transcription and production functions. The governance study referenced above shows that specialist services operate within a variety of business models in different countries. Some organisations collect some data but there are gaps; and there are also no agreed definitions or standards.

This document now introduces a set of indicators that have been developed from the ISO 11620:2008 standard, which sets a general framework. As described above, the requirements of libraries serving print disabled persons introduce specific aspects that go beyond the scope of a general standard. Where necessary, existing definitions and performance indicators have been altered and new ones have been introduced based on feedback given by representatives of member libraries of IFLA's "Libraries Serving Persons with Print Disabilities" Section.

As feedback has shown, not all the indicators will be relevant to all libraries. However, by using those common indicators which are, and by adopting those which in future become useful (e.g. by moving to digital production or delivery methods), libraries for print disabled persons can

make a meaningful comparison of performance indicators across a range of common activities.

## **2. Mission and General Aims of Libraries Serving Print Disabled People**

In order to support libraries in planning, decision making and funding, key performance indicators need to be developed within a strategic framework. This framework is usually set by laws, policy guidelines and individual agreements between the library, its funding authority and its stakeholders.

For the purpose of this document, the following mission and general aims are proposed as a standard framework. It may serve many libraries serving print disabled people; depending on the specific type, task and environmental factors of an institution, additional and/or different missions and aims can apply.

### **2.1 Mission for Libraries Serving Print Disabled People**

To provide and advocate for library services that are equitable and accessible for persons with a print disability

### **2.2 General Aims of Libraries Serving Print Disabled People**

- a. Provide access to resources, materials and formats meeting the specific needs of print disabled people
- b. Produce accessible resources and materials in a timely manner
- c. Empower and engage print disabled people in their access to literature and information
- d. Cooperate and engage with relevant groups and institutions on a local, regional, national and/or international level, and coordinate efforts in order to support the information needs of print disabled people (copyright, open access)
- e. Adopt innovative technologies in order to improve the library's services

## **3. Definitions**

### **3.1 Introduction**

The majority of terms related to performance measurement in libraries are defined in the following International Standards:

ISO 2789:2012 “Information and documentation - International library statistics”

ISO 5127:2001 “Information and documentation – Vocabulary”

ISO 9707:2008 “Statistics on the national production and distribution of electronic and non-electronic publications”

ISO 11620:2007 “Information and documentation - Library Performance Indicators”

The definitions and measures used for this document refer to these International Standards as far as possible; some have been revised to meet the specific requirements of libraries serving print disabled people. For the purposes of this document, the following additional definitions apply.

### **3.2 Additional definitions**

#### **3.2.1 Accessible document**

A document which has been produced, recorded and/or stored in a format accessible for print disabled individuals, these formats may include:

- a. Braille, Moon, and other tactile printed formats
- b. Large and Giant Print, and other non-tactile printed formats
- c. Digital talking book, usually containing a mark up element (e.g. DAISY, with the following subdivisions: human narrated audio; human narrated audio and full text; synthetic speech and full text)
- d. Text-based content in other digital format (e.g. digital Braille, ePub, PDF, ASCII, Word)
- e. Non text-based electronic formats (audio, video, graphic, etc.)
- f. Analogue talking books (e.g. on audio cassette)
- g. Tactile or relief graphics
- h. Other accessible formats.

#### **3.2.2 Print disabled individual**

There is no common definition of this term in law. In different countries there may be different definitions in existence in statutory exceptions to copyright law, or for other legal purposes.

It is likely this term will be defined by the population served by the individual library under its own terms and conditions of service provision.

Commonly used definitions include:

*“A person who cannot effectively read print because of a visual, physical, perceptual, developmental, cognitive, or learning disability”*  
(see <http://www.readingrights.org>)

and

*“any natural person who:*

- is blind; or*
- has an impairment of visual function that cannot be improved by the use of corrective lenses to a level normally acceptable for reading without a special level or kind of light; or*
- is unable, through physical disability, to focus or move his or her eyes to an extent acceptable for reading; or*
- is dyslexic; and whose disability results in an inability to read a commercially available standard edition of a work; and who can be helped to read if the content is reformatted (but, to avoid doubt, requires only a change in the graphic presentation of the original text and not that the text itself be rewritten in simpler terms to facilitate comprehension)”* (see <http://www.visionip.org>).

### **3.3 Reporting period**

Some indicators require that an explicit reporting period is given. In accordance with ISO 11620:2007, the reporting period will normally be one (calendar or fiscal) year. If a different reporting period is used, this should be stated.

## Annex A: Required Statistical Data

To be able to calculate the performance indicators proposed in this document, the following basic statistical data need to be collected. This form is meant to be used as data collection sheet.

<b>Institution:</b>	<b>Year:</b>
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<b>DC: Collection</b>		
DC1	<p><b>Number of unique titles in the collection (irrespective of format)</b></p> <p><i>Note: Includes all titles accessible to users irrespective of their format. Titles accessible in several formats should be counted only once.</i></p>	
DC2	<p><b>Number of unique titles in the electronic collection</b></p> <p><i>Note: Subset of DC1 including all materials accessible online for download or streaming. Materials on CD-ROM, DVD and other “physical” carriers are excluded.</i></p>	
DC3	<p><b>Total number of documents in the loan collection</b></p> <p><i>Definition: A document is a recorded information or material object, which can be treated as a unit in a documentation process. Documents may differ in their physical form and characteristics. [ISO 5127:2001]</i></p>	
DC4	<p><b>Number of acquisitions for the loan collection</b></p> <p><i>Note: Number of documents added to the library’s loan collection by purchase, licensing, legal deposit, digitization, donation or exchange. Production of documents in accessible format by the library should be counted in DC4. [Adapted from ISO 2789:2012] A document is a recorded information or material object, which can be treated as a unit in a documentation process. Documents may differ in their physical form and characteristics. [ISO 5127:2001]</i></p>	
DC5	<p><b>Number of documents produced for the loan collection</b></p>	

	<p><i>Definition: Number of documents produced in accessible format by the library for its collection in the reporting year. A document is a recorded information or material object, which can be treated as a unit in a documentation process. Documents may differ in their physical form and characteristics. [ISO 5127:2001]</i></p>	
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DC6	<p><b>New book titles accessible in the collection</b></p> <p><i>Definition: New book titles in the collection in accessible format which were either acquired or – if applicable – produced in accessible format by the library. New (printed) book titles published in the library’s country in the reporting year, including domestic publications in foreign languages. New book titles include first editions and re-editions; reprints are excluded. [Adapted from ISO 9707:2008]</i></p> <p><i>Note: The dataset has been restricted to new (printed) book titles as a representative publishing statistic which is available for most countries.</i></p>	
DC7	<p><b>New Book Titles Published</b></p> <p><i>Definition: New (printed) book titles published in the library’s country in the reporting year, including domestic publications in foreign languages. New book titles include first editions and re-editions; reprints are excluded. [Adapted from ISO 9707:2008]</i></p> <p><i>Note: The dataset has been restricted to new (printed) book titles as a representative publishing statistic which is available for most countries.</i></p>	

<b>DF: Finance</b>		
DF1	<p><b>Total operating expenditure</b></p> <p><i>Definition: expenditure incurred in the running of a library. Money spent on staff and on resources that are used and replaced regularly. This includes</i></p>	

	<p><i>expenditure on employees, rent, acquisitions and licensing, binding, computer network (operations and maintenance), tele-communication, building maintenance, repair or replacement of existing furnishings and equipment, etc. This can also be termed 'current' or 'recurrent' expenditure. When applicable, local and national sales or purchase taxes [e.g. Value Added Tax (VAT)] are included. [ISO 2789:2012]</i></p>	
DF2	<p><b>Total acquisitions expenditure</b></p> <p><i><u>Definition:</u> The total expenditure for information provision is the sum of expenditures for acquisitions of library materials of all formats, including binding, licenses, pay-per-view costs, and – if applicable – for digitization.</i></p> <p><i>Exclude the cost for producing documents in accessible format and all capital (especially infrastructural) expenditure, rent for buildings, electricity costs etc.) and all other operating expenditures e.g. for staff (including project staff, student assistants, etc.) and staff training, and for all other purposes: operations and maintenance of computers and network, software licenses and telecommunication, rent and maintenance of premises, utility costs (heat, electricity, water, sewage), repair or replacement of existing furnishings and equipment, and other costs like cataloguing records, copying, postage, promotion of services, stationery, insurance, transport and communications, consulting, etc. [Adapted from ISO 2789:2012]</i></p>	
DF3	<p><b>Acquisitions expenditure on the electronic collection</b></p> <p><i>Expenditure on the electronic collection, for the purpose of this indicator, comprises the library's acquisition, subscription and licensing costs and expenditure for producing documents in accessible format for the electronic collection. The electronic collection includes databases, electronic serials, and</i></p>	

	<p><i>digital documents (e.g. e-books).</i></p> <p><i>If the library joins in consortia or other over-all contracts, only the library's own share in the contractual expenses should be counted.</i></p> <p><i>Value added taxes, sales and service taxes or other local taxes are included. Their inclusion may affect international comparisons.</i></p> <p><i>Furthermore, a library might decide to include pay-per-view and electronic document delivery costs with the costs of collection building. This should be stated clearly when publishing or comparing scores.</i></p> <p><i>Expenditure on infrastructure, such as hardware, software or networking, and on digitisation of documents should be excluded.</i></p>	
DF4	<p><b>Total capital expenditure</b></p> <p><i>Definition: Expenditure which results in the acquisition of, or addition to, fixed assets. This includes expenditure on building sites, new buildings and extensions, furnishings and equipment for new and expanded buildings, computer systems (hardware and software), etc. When applicable, local and national sales/purchase taxes [e.g. Value Added Tax (VAT)] are included. [ISO 2789:2012]</i></p>	
DF5	<p><b>Expenditure for training and further education</b></p> <p><i>Definition: Expenditure for vocational training and further education of staff members. Training-on-the-job among colleagues of the same institution is excluded.</i></p>	
DF6	<p><b>Expenditure for promotion and outreach of services</b></p> <p><i>Definition: Expenditure for production and distribution of brochures, advertising, and other primary promotion activities.</i></p>	

## **DS: Staff**

DS1	<p><b>Total number of library staff (FTE)</b></p> <p><i>Definition: Includes all permanent and temporary employees (full time equivalents, FTE) with or without formal qualification in librarianship and information</i></p>	
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DS2	<p><b>Number of library staff in cooperative partnerships and projects (FTE)</b></p> <p><i>Definition: Includes all permanent and temporary library staff resources (full time equivalents, FTE) spent in the planning, maintaining and developing of on-going, formalised and/or especially funded cooperation initiatives and projects between a library and one or more other organisations, including other libraries, e.g. working groups or committees established by library associations or projects funded by governmental or research organizations.</i></p> <p><i>Since many staff members contribute time to partnerships and projects, data should be collected by sampling. Staff is required to keep work diaries or time logs for a week, or for several representative days, and the amount of time spent on partnerships and projects is then calculated as a percentage of the total staff time worked during the sampling period.</i></p> <p><i>[Adapted from ISO/FDIS 11620:2012]</i></p>	

<b>DU: Users, Usage and Services</b>		
DU1	<p><b>Population to be served</b></p> <p><i>Definition: The population to be served is the number of print disabled individuals for whom the library is set up to provide its services and materials. [Adapted from ISO 11620.] For libraries serving diverse populations (e.g. public libraries), this will be one of several subsets of their total population to be served (i.e. rather a target population).</i></p>	
DU2	<p><b>Number of active users</b></p> <p><i>Definition: An active user is a person or organization registered with a library who has been identified while using its collection and/or services within or away from the library [Adapted from ISO 11620:2007]</i></p>	
DU3	<p><b>Number of new active users</b></p> <p><i>Definition: A person or organization newly registered with a library in the reporting year who has been identified at least once while using the library's</i></p>	

	<i>collection and/or services within or away from the library</i>	
DU4	<p><b>Number of active borrowers</b></p> <p><i>Definition: An active borrower is a registered user who has borrowed at least one item during the reporting period [ISO 2789:2012]</i></p>	
DU5	<p><b>Number of loans (issues)</b></p> <p><i>Note: Restricted to physical items. Use of the electronic collection is dealt with in DU7.</i></p>	
DU6	<p><b>Number of documents in the collection that have not been used</b></p> <p><i>Note: Not used means, for the purpose of this indicator, that an item has not been recorded as having been on loan, or has otherwise not been registered as having been used in the library during the specified time period. In-house use is included only when a library records it on a continuous basis.</i></p>	
DU7	<p><b>Number of content units downloaded or streamed</b></p> <p><i>Definition: A content unit is a uniquely identifiable textual or audio-visual piece of published work that may be original or a digest of other published work. PDF, Postscript, HTML and other formats of the same content unit will be counted as separate items. [ISO/FDIS 2789:2012]</i></p>	
DU8	<p><b>Number of information contacts</b></p> <p><i>Definition: All contacts where users approach library staff for information or guidance by means of e-mail, telephone, web forms and interactive (e.g. Web 2.0) services during the reporting period. An information contact may comprise several questions.</i></p>	

## Annex B: Key Performance Indicators

### B.1 Overview

R1	New Book Titles Available in Accessible Format as a Percentage of Total Corresponding Publishing Output	To assess the recency and variety of the library collection as compared to the relevant publishing output
R2	Total Number of Titles Acquired or Produced for the Collection per Active Borrower	To assess to what extent the library is able to serve the users' need for recent literature and information
R3	Percentage of Unique Titles in the Library Collection that are Available Online	To assess to what extent the library provides remote access to its collection.
R4	Total Acquisitions Expenditure per Active User	To assess the financial resources spent by the library to provide its collections to potential users.
U1	Turnover of New Documents	To assess to what extent documents recently added to the collection have been used
U2	Percentage of Stock Not Used	To assess the amount of physical and electronic documents in the collection not used during a specified period. The indicator may also be used to assess the fit of the collection to the requirements of the population to be served.
U3	Number of Loans per Active Borrower	To assess the rate of use of the library collection by its users. May also be used to assess the quality of the collections and the library's ability to promote the use of the collection
U4	Number of Content Units Downloaded or Streamed per Active User	To assess whether users find items of interest in the library's electronic resources
U5	Number of Information Contacts per Active User	To assess the need of users for personal information and assistance
U6	Percentage of Population Reached	To assess the success of the library in reaching its population to be served
U7	Customer satisfaction	To assess the degree to which users are satisfied with the library services as a whole or with different services of the library

E1	Median Time for Document Production	To assess whether the library's production procedures are effective as to speed
E2	Median Time to Produce Materials by User Request	To estimate the time required to produce requested titles in an accessible format.
E3	Average Cost per Title Produced	To assess the average cost of producing title in accessible format
E4	Acquisitions Expenditure per Document Acquired	To assess the average acquisitions cost of documents in accessible format which are not self-produced.
E5	Cost per Active User	To assess the cost of the service of the library related to the number of users.
E6	Percentage of New Active Users	To assess the success of a library to extend its user base
D1	Percentage of Expenditure for Information Provision Spent on the Electronic Collection	To assess the extent to which the library is committed to building an electronic collection.
D2	Expenditure on Infrastructure as a Percentage of Total Library Expenditure	To assess the extent to which the library is committed to building an electronic collection.
D3	Expenditure on Staff Training as a Percentage of Total Operating Expenditure	To assess the library's effort to qualify and develop its human resources
D4	Percentage of Staff in Cooperative Partnerships and Projects	To assess the library's local, regional, national and international cooperation and therewith the library's importance in and impact on the library world.
D5	Expenditure on Promotion and Outreach of Services as a Percentage of Total Operating Expenditure	To assess the financial effort the library puts in marketing its services

## B.2 Descriptions

### B.2.1 Resources

#### R1 New Book Titles Available in Accessible Format as a Percentage of Total Corresponding Publishing Output

OBJECTIVE: To assess the recency and variety of the library collection as compared to the relevant publishing output.

DEFINITION: New book titles available in accessible format divided by the total corresponding publishing output and multiplied by 100:

$$R1 = DC6 / DC7 * 100$$

where

DC6 = New book titles accessible in the collection

DC7 = New book titles published

#### R2 Total Number of Titles Acquired or Produced for the Collection per Active Borrower

OBJECTIVE: To assess to what extent the library is able to serve the users' need for recent literature and information.

DEFINITION: Total number of titles in the collection (irrespective of format) that have been acquired or produced in the reporting period divided by the total number of active borrowers at the end of the reporting period:

$$R2 = (DC4 + DC5) / DU4$$

where

DC4 = Number of acquisitions for the library collection

DC5 = Number of documents produced for the library collection

DU4 = Number of active borrowers

#### R3 Percentage of Unique Titles in the Library Collection that are Available Online

OBJECTIVE: To assess to what extent the library provides remote access to its collection.

DEFINITION: Number of titles in electronic format divided by the total number of unique titles (irrespective of format) in the collection and multiplied by 100:

$$R3 = DC2 / DC1 * 100$$

where

DC1 = Number of unique titles in the collection (irrespective of format)

DC2 = Number of unique titles in the electronic collection

INTERPRETATION: The target value (a “good” result) will differ between libraries depending on the degree of IT and information literacy among users.

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**R4 Total Acquisitions Expenditure per Active User**

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OBJECTIVE: To assess the financial resources spent by the library to provide its collections to potential users.

DEFINITION: The library’s total acquisitions expenditure divided by the population to be served:

$$R4 = DF2 / DU1$$

where

DF2 = Total acquisitions expenditure

DU1 = Population to be served

## B.2.2 Use/Customer Focus

### U1 Turnover of New Documents

**OBJECTIVE:** To assess to what extent documents recently added to the collection have been used.

**DEFINITION:** Total number of loans of documents acquired or produced in the reporting period divided by the number of documents in the loan collection acquired or produced in the reporting period.

$$U1 = DU5 / (DC4 + DC5)$$

where

DU5 = Number of loans (issues)

DC4 = Number of acquisitions for the loan collection

DC5 = Number of documents produced for the loan collection

**REFERENCE:** Adapted from ISO 11620:2007 (B.2.1.1 “Collection turnover”)

### U2 Percentage of Stock Not Used

**OBJECTIVE:** To assess the amount of physical and electronic documents in the collection not used during a specified period. The indicator may also be used to assess the fit of the collection to the requirements of the population to be served.

**DEFINITION:** The number of documents in the loan collection which have not been used in the reporting period divided by the total number of documents in the loan collection and multiplied by 100.

$$U2 = DU6 / DC3 * 100$$

where

DU6 = Number of documents in the collection that have not been used

DC3 = Total number of documents in the loan collection

**REFERENCE:** ISO 11620:2007 (B.2.1.3 “Percentage of Stock Not Used”)

### U3 Number of Loans per Active Borrower

**OBJECTIVE:** To assess the rate of use of the library collection by its users. May also be used to assess the quality of the collections and the library's ability to promote the use of the collection.

**DEFINITION:** Total number of loans in the reporting period divided by the number of active borrowers (including remote borrowers).

$$U3 = DU5 / DU4$$

where

DU5 = Number of loans (issues)

DU4 = Number of active borrowers

**REFERENCE:** Adapted from ISO 11620:2007 (B.2.1.2 “Loans per capita”) This revision refers to active borrowers and includes loans of physical items to remote borrowers.

#### **U4 Number of Content Units Downloaded or Streamed per Active User**

**OBJECTIVE:** To assess whether users find items of interest in the library’s electronic resources.

**DEFINITION:** The number of content units downloaded or streamed from the library’s electronic collection, divided by the total number of active users during a specified time period.

$$U4 = DU7 / DU2$$

where

DU7 = Number of content units downloaded or streamed

DU2 = Number of active users

**REFERENCE:** Adapted from ISO 11620:2007 (B.2.1.4 “Number of content units downloaded per capita”). This revision refers to active users and calculates a general figure for the electronic collection.

#### **U5 Number of Information Contacts per Active User**

**OBJECTIVE:** To assess the need of users for personal information and assistance.

**DEFINITION:** Total number of information contacts divided by the total number of active users at the end of the reporting period.

$$U5 = DU8 / DU2$$

where

DU8 = Number of information contacts

DU2 = Number of active users

#### U6 Percentage of Population Reached

**OBJECTIVE:** To assess the success of the library in reaching its population to be served.

**DEFINITION:** The number of active users divided by the total population to be served multiplied by 100.

$$U6 = DU2 / DU1 * 100$$

where

DU2 = Number of active users

DU1 = Population to be served

**INTERPRETATION:** In some cases, the number of active users (if including external or “secondary” users) can exceed the population to be served.

**REFERENCE:** ISO 11620:2008 (B.2.4.1 “Percentage of the target population reached”)

#### U7 Customer Satisfaction

**OBJECTIVE:** To assess the degree to which users are satisfied with the library services as a whole or with different services of the library.

**DEFINITION:** The average rating by users of the library services as a whole or of different services of the library.

**METHOD:** Design a simple questionnaire listing the specific services, and/or aspects of services, which are to be assessed. A four-, five-, or seven-point scale should be provided for answering the questions. Questions about user status, activity and demographics should also be included in the questionnaire. Draw a representative (random) sample of users and ask them to fill out the questionnaire.

**REFERENCE:** ISO 11620:2007 (B.2.4.2 “User Satisfaction”)

## B.2.3 Efficiency

### E1 Median Time for Document Production

**OBJECTIVE:** To assess whether the library's production procedures are effective as to speed.

**DEFINITION:** Median number of days between the day a document is decided for production by library staff and the day it is available for users.

**METHOD:** Log the dates for a representative (random) sample of documents produced, then calculate the median from this sample. Break the calculation down to material types, e.g. textbooks and non-textbook materials if applicable.

The median is the "middle value"; to calculate it, place the given elements in your dataset in value order and find the middle value. If the size of your dataset is even, take the average of the two middle elements. The median is a "better" statistic than the arithmetic mean as the latter can be biased by outliers.

**REFERENCE:** Adapted from ISO 11620:2007 (B.3.2.1 "Median time of document acquisition" and B.3.2.2 "Median time of document processing"). This revision refers to the production of documents in accessible format by the library.

### E2 Median Time to Produce Materials by User Request

**OBJECTIVE:** To estimate the time required to produce requested titles in an accessible format.

**DEFINITION:** Median number of days between the day a document is requested for production by a user and the day it is available for the user.

**METHOD:** Log the dates for a representative (random) sample of requested documents produced, then calculate the median from this sample. Break the calculation down to material types, e.g. textbooks and non-textbook materials if applicable.

The median is the "middle value"; to calculate it, place the given elements in your dataset in value order and find the middle value. If the size of your dataset is even, take the average of the two middle elements. The median is a "better" statistic than the arithmetic mean as the latter can be biased by outliers.

**E3 Average Cost per Title Produced in Accessible Format**

**OBJECTIVE:** To assess the average cost of producing title in accessible format.

**DEFINITION:** All costs involved in the production of titles in accessible format in the reporting period, including staff costs, materials and the purchasing and maintaining of equipment divided by the total number of titles produced in accessible format in the reporting period/ per annum

**METHOD:** Divide the sum of all cost involved in the production of all titles in electronic format (see definition) by the number of titles produced. A large proportion of this cost will be indirect (overhead) and difficult to attribute to individual titles. Therefore, in contrast to E1 and E2, this indicator calculates average cost rather than a median from the production cost of individual titles.

**E4 Acquisitions Expenditure per Document Acquired**

**OBJECTIVE:** To assess the average acquisitions cost of documents in accessible format which are not self-produced.

**DEFINITION:** Total acquisitions expenditure on divided by total number of documents that have been acquired in accessible format during the reporting period.

$$E4 = DF2 / DC4$$

where

DF2 = Total acquisitions expenditure

DC4 = Number of acquisitions for the loan collection

**E5 Cost per Active User**

**OBJECTIVE:** To assess the cost of the service of the library related to the number of users.

**DEFINITION:** The total operating expenditure of the library in a full financial year divided by the number of users at the end of the respective financial year.

$$E5 = DF1 / DU2$$

where

DF1 = Total operating expenditure

DU2 = Number of active users

REFERENCE: ISO 11620:2007 (B.3.4.1 “Cost per user”)

**E6 Percentage of New Active Users**

OBJECTIVE: To assess the success of a library to extend its user base.

DEFINITION: Number of active users that have been added to the library’s user database in the reporting year divided by the number of active users and multiplied by 100.

$$E6 = DU3 / DU2 * 100$$

where

DU2 = Number of active users

DU3 = Number of new active users

## B.2.4 Development

### D1 Percentage of the Expenditure for Information Provision Spent on the Electronic Collection

**OBJECTIVE:** To assess the extent to which the library is committed to building an electronic collection.

**DEFINITION:** The library's expenditure for the electronic collection divided by the library's total acquisitions expenditure and multiplied by 100:

$$D1 = DF3 / DF2 * 100$$

where

DF2 = Total acquisitions expenditure

DF3 = Acquisitions expenditure on the electronic collection

**REFERENCE:** Revised from ISO 11620:2007 (B.4.1.1 "Percentage of expenditures on information provision spent on the electronic collection"). This revision includes expenditures for producing electronic documents.

### D2 Expenditure on Infrastructure as a Percentage of Total Library Expenditure

**OBJECTIVE:** To assess the library's investments in its physical infrastructure and information technology.

**DEFINITION:** Total capital expenditure divided by total library expenditure and multiplied by 100:

$$D2 = DF4 / (DF1 + DF4) * 100$$

where

DF1 = Total operating expenditure

DF4 = Total capital expenditure

**METHOD:** The indicator should be used with a longer reporting period of five or ten years to account for wide variations possibly occurring from year to year.

### D3 Expenditure on Staff Training as a Percentage of Total Library Expenditure

**OBJECTIVE:** To assess the library's effort to qualify and develop its human resources.

**DEFINITION:** Expenditure for vocational training and further education of staff members divided by the total operating expenditure and

multiplied by 100:

$$D3 = DF5 / DF1 * 100$$

where

DF5 = Expenditure for training and further education

DF1 = Total operating expenditure

#### **D4 Percentage of Staff in Cooperative Partnerships and Projects**

**OBJECTIVE:** To assess the library's local, regional, national and international cooperation and therewith the library's importance in and impact on the library world.

**DEFINITION:** The number of library staff (FTE) in cooperative partnerships and projects, divided by the total number of library staff (FTE).

$$D4 = DS8 / DS7$$

where

DS7 = Total number of library staff (FTE)

DS8 = Number of library staff (FTE) in cooperative partnerships and projects

**METHOD:** Round off to one decimal place.

**INTERPRETATION:** The indicator results can vary greatly over years and can be influenced by the availability of funding for projects.

**REFERENCE:** ISO/TR 28118:2009 (A.7.4)

#### **D5 Expenditure on Promotion and Outreach of Services as a Percentage of Total Operating Expenditure**

**OBJECTIVE:** To assess the financial effort the library puts in marketing its services

**DEFINITION:** Expenditure for promotion and outreach of services divided by the total operating expenditure and multiplied by 100:

$$D5 = DF6 / DF1 * 100$$

where

DF1 = Total operating expenditure

DF6 = Expenditure for promotion and outreach of services