**ODIN IPEDS / ACRL Guidelines – January 2022**

ODIN reports used information found in the MnPALS IPEDS documentation as a starting point. Criteria listed there was evaluated and then customized for the ODIN Libraries. The MnPALS site contains background information and definitions that may be helpful to review so the link to the entire publication is included below. Each subsection in this document contains a direct link to the MnPALS information sheet relevant to that topic.

MnPALS IPEDS Link: <https://mlpp.pressbooks.pub/ipeds/front-matter/introduction/>

<https://mlpp.pressbooks.pub/ipeds/back-matter/tips/>

**DEADLINES AND TIMING**

ACRL Survey is due February 28, 2022.

IPEDS is due April 6, 2022 for keyholders (library data needs to be sent to keyholder before that).

Reporting period is previously completed FY – for most that would be July 1, 2020 to June 30, 2021.

Collection of data ideally would happen June 30 or July 1 and this timeline will be implemented going forward.

**LOCATION OF REPORTS**

2022 IPEDS Dashboard framework has been created. Reports and custom dashboard have been placed in each library’s folder (in case library wishes to edit a report). Master copy located in ODIN shared folder.

**Physical Title Counts**:

<https://mlpp.pressbooks.pub/ipeds/chapter/physical-title-counts/>

Books:

Dashboard tab: Physical – Books

Fields needed: Date for end of reporting period.

Use Item Creation Date if you do not use Acquisitions or Receiving Date if you do use Acquisitions

Media:

Dashboard tab: Physical – Media

Fields needed: Date for end of reporting period.

Use Item Creation Date if you do not use Acquisitions or Receiving Date if you do use Acquisitions

Serials:

Dashboard tab: Physical – Serials

Fields needed: Date for end of reporting period.

Use Item Creation Date if you do not use Acquisitions or Receiving Date if you do use Acquisitions

Volumes (for ACRL Survey):

Dashboard tab: Physical – Volumes

Fields needed: Date for end of reporting period.

Use Item Creation Date if you do not use Acquisitions or Receiving Date if you do use Acquisitions

**Digital Title Counts**:

<https://mlpp.pressbooks.pub/ipeds/chapter/digital-title-counts/>

*For each Digital Title Count area, you will need to take the data pulled from the NZ (ideally this will be run June 30/July 1 in the future), add IZ data from the reports below, and then any data from your vendors not tracked via ALMA.*

Electronic Books (including gov docs):

Dashboard tab: Digital/Electronic - Books

Fields needed: Portfolio Activation Date – enter end of reporting period

Electronic Databases:

Dashboard tab: Digital/Electronic - Databases

Fields needed: Electronic Collection Activation Date – enter end of reporting period

Electronic Media:

Dashboard tab: Digital/Electronic - Media

Fields needed: Portfolio Activation Date – enter end of reporting period

Electronic Serials:

Dashboard tab: Digital/Electronic - Serials

Fields needed: Portfolio Activation Date – enter end of reporting period

Question 45 - External Contributions from Consortia / Network(s) / System Office (for ACRL Survey)

\*\*\* this should be the information on the distributed NZ reports

**Circulation – Physical and Digital:**

<https://mlpp.pressbooks.pub/ipeds/chapter/circulation-physical-and-digital/>

Total Physical:

Dashboard tab: Circulation - Physical

Fields needed: Loan Date period – prepopulated with 7/1/20 – 6/30/21

Total Digital/Electronic: COUNTER 5 reports from vendors

**INTERLIBRARY LOAN:**

<https://mlpp.pressbooks.pub/ipeds/chapter/interlibrary-loan/>

ILL Provided (Lending):

Dashboard tab: ILL’s Provided (Lending)

Fields needed: Item Sent Date Between period – prepopulated with 7/1/20 – 6/30/21

ILL Received (Borrowing):

Dashboard tab: ILL’s Received (Borrowing)

Fields needed: Borrowing Creation Date Between period – prepopulated with 7/1/20 – 6/30/21

\*\*\* Note: You will also need to account for any transactions that took place outside of ALMA.

**Expenses – Physical and Digital:**

<https://mlpp.pressbooks.pub/ipeds/chapter/expenses/>

Materials Expenses:

Dashboard tab: Expenses (for Acquisitions)

Fields needed: Transaction Date Between period – prepopulated with 7/1/20 – 6/30/21

\*\*\* Notes:

* You may need to add or subtract items depending on what your library is tracking through ALMA.
* If you are not using ALMA Acquisitions, you may be able to get the needed information from your institution’s Business Office.

**Supplemental Information**

Information below for Library Consortia was copied from the IPEDS instructions and included here for your convenience.

<https://surveys.nces.ed.gov/ipeds/public/survey-materials/forms?surveyid=15&instructionid=30103&formid=103>

***Notes for Library Consortia***

A library consortium is any local, statewide, regional, or interstate cooperative association of libraries that provides for the systematic and effective coordination of the resources of schools, public, academic, and special libraries and information centers, for improving services to the clientele of such libraries. (U.S. Code of Federal Regulations, Sect. 54.500)

The purpose of library consortia can include:

* Cost reduction through group purchasing
* Professional development for library staff
* Resource sharing (content, technology, expertise, and funding)
* Networking, information sharing, mass communication
* Building shared integrated library management and cataloging systems.

A library consortium can be multitype, almost any type of library can participate (e.g., public libraries). For IPEDS purposes, academic libraries that share an administrative unit are NOT considered a consortium (see definition of branch and independent libraries). There are two cases of consortium: one in which members share ALL library resources or one in which they share PARTIAL resources. Refer below for specific instructions in each case.

***Consortium Members Sharing ALL Resources***

In the case of consortia where individual library members share ALL the same library resources and library budget, a parent/child relationship for reporting Academic Libraries data may be established if certain criteria are met. Parent/child relationships can be established for institutions if: (1) the child institution is in the same institutional control as the parent, and (2) the child institution is not set up to report its own academic libraries expenses or collections data. Once a parent/child relationship has been established, the parent institution will report all data for the child institution. Shared resources are to be reported at the system level. For example, if 20,000 e-book titles were purchased by two institutions in a parent/child relationship to be shared, the parent institution will report 20,000 e-book titles and not 40,000 e-book titles. Institutions wishing to establish a parent/child relationship must contact the Help Desk. See the [resource guide](http://nces.ed.gov/ipeds/resource/download/al_reporting_relationships.pdf) for more details on parent/child reporting.

***Consortium Members Sharing PARTIAL Resources***

In the case where individual library members of the consortia share PARTIAL resources and/or are set up to report their own academic library expenses or collections data, they must do so for their individual institution. Please note the instructions below.

**Reporting digital/electronic collection**

If your library is part of a consortium of independent libraries and shares a common e-service (e.g., Overdrive), then count the number of digital/electronic usage for your library only. For example, if your library pays a set annual fee, as part of a consortium, for access rights to 1200 e-books that are shared across all members of the consortium, then your library should count the 1200 titles as part of its e-book collection.

**Reporting digital/electronic circulation or usage**

If your library is part of a consortium of independent libraries and shares a common e-service (e.g., Overdrive), then count the number of digital/electronic usage for your library's e-books and e-media collection only. If the usage count for only your institution is not available from the e-service provider, you may allocate the total usage based on characteristics of the institutions in the consortia (e.g., based on percentage Full Time Equivalent students, based on percentage of consortial fees). Do not include counts from other members of the consortium.

**Reporting ongoing expenses for electronic/digital materials or database purchased through a set annual consortium fee**

Report them under 'All other operations and maintenance expenses'. Do not include under 'Ongoing commitments to subscriptions.'