

Academic Libraries Reporting Relationships

There are two different types of reporting relationships that can be established for the Academic Libraries (AL) component of IPEDS, a parent/child relationship and a main/branch library relationship. In both types of reporting relationships, the main or central library will report collections and expenditures information for itself and the branch libraries. However, parent/child relationships can only be established for main and branch libraries located at different institutions (with different IPEDS Unit IDs).

Branch and independent libraries are defined as auxiliary library service outlets with quarters separate from the central library of an institution, which have a basic collection of books and other materials, a regular staffing level, and an established schedule. Branch libraries are administered either by the central library, or as in the case of some libraries (such as law, medical, etc.), through the administrative structure of the other units within the university. They can include virtual/digital-based branch and independent libraries. Departmental study/reading rooms are not included.

Main/Branch Library Relationship

This type of relationship can be established for branch libraries that are located at the same institution (meaning it has the same IPEDS Unit ID) as the institution of the main or central library.

Parent/Child Relationship

This type of relationship can be established for branch libraries that are located at a different institution (meaning it has a different IPEDS Unit ID) from the institution of the main or central library. *Libraries in consortia that share ALL their resources typically fall into this category.* The following criteria must also be met: (1) the child institution (the institution of the branch library) is in the same institutional control as the parent (the institution of the main library), and (2) the child institution is not set up to report its own academic libraries expenditures or collections data.

	How is the relationship established in the Data Collection System (DCS)?	How is Section I: Collections reported?	How is Section II: Expenditures reported?	How to report the number of Branch or Independent Libraries in Section II?	How is allocation factors reported?
Main/Branch	No formal way to establish in the DCS because only one IPEDS Unit ID is involved	Main library reports combined totals for itself and the branch libraries	Main library reports combined totals for itself and the branch libraries	Report the total number of branch libraries	Allocation factors will not be asked for this type of relationship.
Parent/Child	Help Desk establishes this relationship in DCS	Parent institution reports combined totals for itself and the child institutions	Parent institution reports combined totals for itself and the child institutions	Do not report the child institutions as branch libraries	Parent institution will report the allocation factors for its child institutions

Allocation Factors

Only institutions with established parent/child relationships will be required to report allocation factors. The parent institution will report allocation factors for their children institutions. Allocation factors are percentages that indicate how the data reported by the parent can be distributed among all included institutions. It will be used to create derived variables for the IPEDS Data Feedback Report to allocate reported data to each component location.

Institutions can use whichever method they have for calculating allocation factors. However, one typical method typically employed is to calculate percentage of estimated library expenditures. For example, if institution A is the parent institution and contributes to 50 percent of total library expenditures, while institutions B and C contribute 25 and 25 percent, respectively, then the allocation factors would be A=50%, B=25%, and C=25%.