What’s the purpose of the Annual Report?

- Required by state (590 IAC 6-1-4)
- The only annual collection of public library data
- ISL maintains statistics
  - Year-to-year comparisons (and history!)
  - Library-to-library comparisons
  - Identifying trends
Stats help us communicate
IMLS Public Libraries Survey

- The only annual, comprehensive, national survey about what’s going on in public libraries.
- National library publications, advocacy
- ‘Compare Libraries’ tool (returning soon?)
What’s different in 2016?

- New Questions
- SRCS
- Successful Retrieval of Electronic Information
Timeline

- **December 15** or so – Survey will open
  - Directors will receive email with login instructions
- **March 1** – Survey will close (**NEW date** per 2017 Standards)
Navigating the Survey

- Click on question numbers for help
  - Disable pop-up blockers

Use “Back,” “Next,” or the side menu to navigate through the 15 sections

Click “Save” and “Logout” to close and return to report at any time

Click “SHOW LAST YEAR’S ANSWERS” to see what was input last year

- Don’t wait until the last minute!
Survey Interface

- Use Tabs to navigate
  - Home
  - Survey - 2016
  - Status
  - Printing
  - Frequent Questions
  - Instructions
Need to explain something?

Edit Checks and Notes

• Edit Checks- will catch inconsistencies or major changes from previous year’s data
  • Now- Bibliostat
  • Later- American Institute for Research

• “Flag” a question to come back to it

• Notes –
  • Federal Note – passed along to ISL/AIR
  • Local Notes – for your own reference

• Annotate any responses that require an explanation, or when prompted by an edit check.

• If annotations aren’t present, ISL will be following up with you.
Need technical help?

- Is it a local issue? Check with your IT person/department
  - Firewalls, Browsers, etc.
- Contact ISL – 1-800-451-6028
  - Can edit prefilled responses
- Call Bibliostat - 1-866-785-9935
Getting Started with
The Survey
Annual Report
Survival Kit

- Caffeine
- Snacks
- Tissues
- Stress ball (or soft surface to bang your head)
- iCal reminder set for February 28th
- Accurate statistics from your staff, circulation, and bookkeeping systems
TIMEFRAME OF REPORT
You will be reporting on the 2016 calendar year.

Exceptions: give the most current (e.g. early 2017) information for:
• Respondent/contact identification
• Hours of operation
• Assessed valuation and tax rate
• Library board members, and
• Hourly Salaries and Benefits

ESTIMATES
• If the exact data are not known for any item, please estimate.
• Enter “0” if the correct entry for an item is zero or “none”.
• Enter “N/A” if you know a particular data item is not “0” but you don’t know what it is and are unable to estimate it.
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>oX-001</td>
<td>Question</td>
</tr>
<tr>
<td>oX-002</td>
<td>Standards Question</td>
</tr>
<tr>
<td>oX-003</td>
<td>Prefilled</td>
</tr>
<tr>
<td>oX-004</td>
<td>Prefilled &amp; Locked (Contact ISL for changes)</td>
</tr>
<tr>
<td>oX-005</td>
<td>Calculated total</td>
</tr>
</tbody>
</table>
Part 1 - General Information

Changes:

• Additional clarification re: download speeds
**Part 1 - General Information**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-001</td>
<td>Name of the person preparing this report.</td>
</tr>
<tr>
<td>01-002</td>
<td>Preparer's phone number.</td>
</tr>
<tr>
<td>01-003</td>
<td>Time zone in which library district headquarters is located.</td>
</tr>
<tr>
<td>01-004</td>
<td>Library Name</td>
</tr>
<tr>
<td>01-005</td>
<td>Library Class</td>
</tr>
<tr>
<td>01-006</td>
<td>Library Director</td>
</tr>
<tr>
<td>01-007</td>
<td>Street Address</td>
</tr>
<tr>
<td>01-008</td>
<td>City</td>
</tr>
<tr>
<td>01-009</td>
<td>ZIP</td>
</tr>
<tr>
<td>01-010</td>
<td>Is your mailing address the same as the address above?</td>
</tr>
<tr>
<td>01-011</td>
<td>Mailing Address</td>
</tr>
<tr>
<td>01-012</td>
<td>Mailing City</td>
</tr>
<tr>
<td>01-013</td>
<td>Mailing ZIP</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>01-014</td>
<td>Congressional District Number</td>
</tr>
<tr>
<td>01-015</td>
<td>Phone</td>
</tr>
<tr>
<td>01-016</td>
<td>FAX</td>
</tr>
<tr>
<td>01-017</td>
<td>Does your library have an answering machine, voice mail or other similar technology? Y/N</td>
</tr>
<tr>
<td>01-018</td>
<td>Library URL</td>
</tr>
<tr>
<td>01-019</td>
<td>Public library E-mail address or other means of electronic contact listed on the library's website</td>
</tr>
</tbody>
</table>
Building Questions

01-020  The year the current central building was built
01-021  Year of the most recent structural addition or alteration to current central building.
01-022  Square footage of the central building?
01-023 Click here to complete Central Library daily hours

01-024 Monday opening time
01-025 Monday closing time
01-026 Tuesday opening time
01-036 Sunday opening time
01-037 Sunday closing time

Note: Formatting/spacing is important
e.g. 10:00 AM (NOT 10:00AM)
Central Library Questions

01-038 Total open hours for Central Library during a typical week.

01-039 Total number of hours the Central Library is open after 6:00 p.m. per week.

01-040 Total number of hours per week that the Central Library is open on Saturday.

01-041 Total number of hours per week Central Library is open on Sunday.

01-042 Number of Weeks Per Year Central Library was open in 2016

01-043 Total Central Library Hours Open per Year
Central Library Questions

Internet Access

01-044 Does the library have Internet Access? Y/N

01-045 What type of Internet Access is available in the Central Building?

01-046 Specify the speed of Internet Access in the Central Building. Use www.speedtest.net to determine speed.

Please specify the unit of measurement (e.g. 20 MBPS)

…or use the speed test of your choice

*Recommended testing time- 12 Noon
Branches

• No changes here.
• Use Remove Group/Add Group to remove or add branches.
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-200</td>
<td>Total number of Branches</td>
</tr>
<tr>
<td>01-200a</td>
<td>Branch Name</td>
</tr>
<tr>
<td>01-201a</td>
<td>Branch Street Address</td>
</tr>
<tr>
<td>01-202a</td>
<td>Branch City</td>
</tr>
<tr>
<td>01-203a</td>
<td>Branch County</td>
</tr>
<tr>
<td>01-204a</td>
<td>Branch Zip</td>
</tr>
<tr>
<td>01-205a</td>
<td>Is your mailing address the same?</td>
</tr>
<tr>
<td>01-206a</td>
<td>Branch Mailing Address</td>
</tr>
<tr>
<td>01-207a</td>
<td>Phone</td>
</tr>
<tr>
<td>01-208a</td>
<td>Fax</td>
</tr>
<tr>
<td>01-209a</td>
<td>Total Square Footage of Branch</td>
</tr>
<tr>
<td>01-210a</td>
<td>Year Built</td>
</tr>
<tr>
<td>01-211a</td>
<td>Year of the most recent structural addition or alteration to branch building</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------------------------</td>
</tr>
<tr>
<td>01-212a</td>
<td>Number of Weeks per Year Individual Branch is Open</td>
</tr>
<tr>
<td>01-213a</td>
<td>Monday opening time</td>
</tr>
<tr>
<td>01-214a</td>
<td>Monday closing time</td>
</tr>
<tr>
<td>01-225a</td>
<td>Sunday opening time</td>
</tr>
<tr>
<td>01-226a</td>
<td>Sunday closing time</td>
</tr>
<tr>
<td>01-227a</td>
<td>Total open hours for the Branch Library during a typical week.</td>
</tr>
<tr>
<td>Question ID</td>
<td>Question</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>01-228a</td>
<td>Does the Branch library have Internet Access? Y/N</td>
</tr>
<tr>
<td>01-229a</td>
<td>What type of Internet Access is available in the Branch library?</td>
</tr>
<tr>
<td>01-230a</td>
<td>Specify the speed of Internet Access in the Branch library.</td>
</tr>
<tr>
<td>01-231a</td>
<td>Number of wireless hubs located in the branch library?</td>
</tr>
<tr>
<td>01-237</td>
<td>Total Annual Hours of All Branches</td>
</tr>
</tbody>
</table>
Bookmobiles

Use Remove/Add Group to remove/add bookmobiles.
01-300  Total Number of Bookmobiles  *(If 0, skip these questions!)*

Individual Bookmobile Information

01-301a  Bookmobile Name
01-302a  Street Address
01-303a  City
01-304a  County
01-305a  Zip
01-306a  Is your Mailing address the same?
01-307a  Mailing Address
01-308a  Phone
01-309a  Fax
Bookmobiles

01-310a  Total hours per week
01-311a  Number of Weeks Bookmobile is Open
01-312a  **Does the Bookmobile have Internet Access?**
01-313a  What type of Internet Access is available in the Bookmobile?
01-314a  Specify the speed of Internet Access in the Bookmobile
01-315a  Number of wireless hubs located in the Bookmobile?

01-316  **Total Annual Hours of all Bookmobiles**
Part 1 - General Information

01-500 Total System Public Service Hours per Year
(Central + Branches + Bookmobiles)
Part 2 – Registrations

• No changes here
Registrations

• A REQUEST-
  • Please explain any large changes to your registration numbers in a Federal note (if the reason is known).
  • Edit checks may be required for responses that are the same, less than half, or greater than 1.5 times last year’s answers.
Part 2 – Registrations

02-001 Total Number of Individual **Resident** Registered Users
02-002 Total Number of Users from Contracting Areas
02-003 Total Number of Individual **Non-Resident** (non-taxed) Registered Users
02-004 Total Number of **Reciprocal** Users
02-005 Total Number of **PLAC** Users
02-006 Total Number of Non-Resident Cards Issued to Student Users
02-007 Total Number of Non-Resident Cards Issued to School Employees
02-008 Total Number of Non-Resident Cards Issued to Library Employees

**02-009** Amount of Individual **Non-Resident Fee**

**02-010** Date Library Board adopted this fee

**02-011** Does your library purge or mark inactive patron files at least every three years? **Y/N**
Part 3 – Public Libraries and Political Subdivisions Served

• No changes here
### Part 3 – Public Libraries and Political Subdivisions Served

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>03-001</td>
<td>County Name of Primary County</td>
</tr>
<tr>
<td>03-002</td>
<td>Total Assessed Valuation for Library District</td>
</tr>
<tr>
<td>03-003</td>
<td>Operating Tax Rate</td>
</tr>
<tr>
<td>03-004</td>
<td>Source year for data</td>
</tr>
<tr>
<td>03-005</td>
<td>BIRF/Lease Rental Tax Rate</td>
</tr>
<tr>
<td>03-006</td>
<td>LCPF Tax Rate</td>
</tr>
<tr>
<td>03-007</td>
<td>Did your library roll the LCPF into the operating tax rate? Y/N</td>
</tr>
<tr>
<td>03-008</td>
<td>County Name for additional county</td>
</tr>
<tr>
<td>03-009</td>
<td>Total Assessed Valuation for additional county</td>
</tr>
<tr>
<td>03-010</td>
<td>Operating Tax Rate for additional county</td>
</tr>
<tr>
<td>03-011</td>
<td>BIRF/Lease Rental Tax Rate</td>
</tr>
<tr>
<td>03-012</td>
<td>LCPF Tax Rate</td>
</tr>
</tbody>
</table>
Part 3 – Public Libraries and Political Subdivisions Served

03-013 Total district population without contract
03-014 Total district population with contracts
03-015 Political Subdivision Name
03-016 Type of Political Unit (Taxed Units 1, 2, 3, 4, 9, 11, 12 Only)
03-017 Population 2010 Census (Taxed & Served)
03-018 Type of Political Unit (Contracting Units 5, 6, 7, 8, 10 Only)
03-019 Population 2010 Census (Served by Contract)
Part 3 – Public Libraries and Political Subdivisions Served

Some notes:

- 03-008 – Additional County info is only required of libraries crossing county lines and the 4 county-contractuals
- 03-016 Type of Political Unit - Taxed Units
  - 1 (city/town)
  - 2 (more than 1/2 of county)
  - 3 (total county)
  - 4 (township merged)
  - 9 (township validated)
  - 11 (endowed)
  - 12 (county contractual) Only
- 03-018 Type of Political Unit - Contracting Units
  - 5 (Township, partial, served by contract)
  - 6 (Township served by contract)
  - 7 (Township taxed to pay contract)
  - 8 (Township, partial, taxed to pay contract)
  - 10 (Town served by contract) Only
Part 4 – Library
Operating Fund Income

- No changes here
**Local Government Operating Fund Income**

04-001  Property Tax or CEDIT Operating Fund Income from Library Tax Rate

04-002  CAGIT Property Tax Replacement Credit

04-003  CAGIT Certified Shares

04-004  CAGIT Special Fund

04-005  County Option Income Tax (COIT)

04-006  Contractual Revenue Received for Service

04-007  Local Option Income Tax (LOIT)

04-008  Total Local Operating Fund Income
Part 4 – Library Operating Fund Income

**State** Government Operating Fund Income

04-009 Financial Institutions Tax (FIT)
04-010 License Vehicle Excise Tax (LVET)
04-011 Commercial Vehicle Excise Tax (CVET)
04-012 Other State Operating Fund Income

04-013 Source(s):

04-014 Total State Operating Fund Income
Part 4 – Library Operating Fund Income

Federal Government Operating Fund Income
- 04-015 LSTA Grants (Operating Fund)
- 04-016 Name of Non-Operating Fund
- 04-017 Amount of LSTA grant placed in Non-Operating Fund
- 04-018 Other Federal Grants Operating Fund Income
- 04-019 List Source
- 04-020 Total Federal Operating Fund Income
Part 4 – Library Operating Fund Income

Other Operating Fund Income
04-021   PLAC Reimbursement
04-022   Fines and Fees
04-023   Interest on Investments
04-024   Gift Receipts Operating Fund Income
04-025   Private and Public Foundation Grants Operating Fund Income
04-026   Miscellaneous Operating Fund Income.
04-027   Source(s)
04-028   Total Public and Private Foundation Grants Income (deposited into any fund)
04-029   Total Other Operating Fund Income

04-030   Total Operating Fund Income
Part 5 – Expenditure Data

• No changes
• Operating Fund expenditures, unless otherwise specified
Part 5 – Expenditure Data

Personal Services/Staff Expenditures

05-001 Salaries/Wages of All Library Staff
05-002 Employee benefits
05-003 Other Personal Services

05-004 Total Personal Services

05-005 Total Staff Expenditures (PLS – does not include “other”)
### Part 5 – Expenditure Data

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>05-006</td>
<td>Total Supplies</td>
</tr>
<tr>
<td>05-007</td>
<td>Professional Services</td>
</tr>
<tr>
<td>05-008</td>
<td>Communication and Transportation</td>
</tr>
<tr>
<td>05-009</td>
<td>Printing and Advertising</td>
</tr>
<tr>
<td>05-010</td>
<td>Insurance</td>
</tr>
<tr>
<td>05-011</td>
<td>Utility Services</td>
</tr>
<tr>
<td>05-012</td>
<td>Repairs and Maintenance</td>
</tr>
<tr>
<td>05-013</td>
<td>Rentals</td>
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<tr>
<td>05-014</td>
<td>Debt Service</td>
</tr>
<tr>
<td>05-015</td>
<td>Lease Rental</td>
</tr>
<tr>
<td>05-016</td>
<td>Other (Dues, miscellaneous taxes)</td>
</tr>
<tr>
<td>05-017</td>
<td>Total Other Services and Charges</td>
</tr>
</tbody>
</table>
Part 5 – Expenditure Data

Capital Outlays
05-018 Land
05-019 Buildings
05-020 Improvements Other Than Buildings
05-021 Furniture and Equipment

05-022 Capital Outlays for Public Access Computers, electronic reading and electronic media devices
Part 5 – Expenditure Data

Materials

05-023 Books (Include Book Lease)

05-024 Periodicals and Newspapers

05-025 Audio/Visual Materials, Nonprinted (Physical) Materials, & Microforms, not Electronic (Re-worded)

05-026 Ebook and Electronic database licensing/purchase/lease expenditures.

05-027 Electronic Physical Format, including Playaways and Ebook readers
Materials (expenditures from NON-OPERATING Funds)

05-028   Books (Include Book Lease)
05-029   Periodicals and Newspapers
05-030   Audio/Visual Materials, Nonprinted (Physical) Materials, & Microforms, not Electronic (Re-worded)
05-031   Ebook and Electronic Database licensing/purchase/lease expenditures
05-032   Electronic Physical Format (playaways, ebook readers, etc)
Part 5 – Expenditure Data

05-033  Total Expenditures for Print Materials
05-034  Total Expenditures for Electronic Materials
05-035  Total Expenditures for Other Materials
05-036  Total Expenditures for Collections
05-037  Total Operating Fund Capital Outlays
Part 5 – Expenditure Data

05-038 Total Operating Fund Expenditures for Collection Development
05-039 Total Non-Operating Fund Expenditures for Collection Development
05-040 Public Access Computers, electronic reading and electronic media devices from all non-operating funds
Part 5 – Expenditure Data

05-041  Total Operating Fund Expenditures
05-042  Other Operating Expenditures
05-043  Total Operating Expenditures
05-044  Total Capital Fund Expenditures
Part 5 – Expenditure Data

Non-Resident Fee Standard

05-045  Total Collection Expenditures
05-046  Total 2015 Operating Expenditures per capita *(for this year’s standards calculation)*
05-047  Difference between OE per capita minus Non-Resident fee
05-047a Does your library's non-resident fee meet the standard? (Y/N)
05-048  Total 2016 Operating Expenditures per capita *(for next year)*
Collection Development Standard

05-049 Collection Development Expenditure as a percentage of Operating Expenditure
Part 6 – Capital Revenue

- No changes here
What is Capital Revenue?

PLS Definition:

• Report all revenue to be used for major capital expenditures, by source of revenue. Include funds received for:
  • Site acquisition
  • NEW buildings
  • Additions to or renovation of library buildings
  • Furnishings, equipment, and initial collections (print, non-print, and electronic) for a building that is NEW or renovated.
  • Computer hardware and software used to support library operations, to link to networks, or to run information products (MAJOR projects or for a building that is new or renovated)
  • New vehicles; and
  • Other one-time major projects.

• Exclude revenue for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation.

• Exclude income passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover).
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>06-001</td>
<td>Local government capital revenue</td>
</tr>
<tr>
<td>06-002</td>
<td>State government capital revenue</td>
</tr>
<tr>
<td>06-003</td>
<td>Federal government capital revenue</td>
</tr>
<tr>
<td>06-004</td>
<td>Other capital revenue</td>
</tr>
<tr>
<td>06-005</td>
<td>Total Capital Revenue</td>
</tr>
</tbody>
</table>
Part 7 – Employment Data
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>07-001</td>
<td>Total number of all librarians with an ALA-MLS</td>
</tr>
<tr>
<td>07-002</td>
<td>Total hours paid per week for all ALA-MLS librarians</td>
</tr>
<tr>
<td>07-003</td>
<td>FTE for all librarians with an ALA-MLS</td>
</tr>
<tr>
<td>07-004</td>
<td>Total number of all librarians, including ALA-MLS librarians</td>
</tr>
<tr>
<td>07-005</td>
<td>Total hours paid per week for all librarians, including ALA-MLS librarians</td>
</tr>
<tr>
<td>07-006</td>
<td>FTE for all librarians</td>
</tr>
<tr>
<td>07-007</td>
<td>Total number of all other paid staff</td>
</tr>
<tr>
<td>07-008</td>
<td>Total Hours paid per week for all other paid staff</td>
</tr>
<tr>
<td>07-009</td>
<td>FTE for all other paid staff</td>
</tr>
<tr>
<td>07-010</td>
<td>Total number of all paid staff</td>
</tr>
<tr>
<td>07-011</td>
<td>Total hours paid per week for all paid staff</td>
</tr>
<tr>
<td>07-012</td>
<td>FTE for all paid staff</td>
</tr>
<tr>
<td>07-013</td>
<td>Number of hours per week considered to be full-time employment in your library?</td>
</tr>
</tbody>
</table>
Part 8 – Library Service and Technology

• NEW: SRCS Transits
• Questions renumbered
Interlibrary Loans

08-001 Number of interlibrary loan items (loans and photocopies) your library has provided to other Indiana libraries.
08-002 Evergreen Transits to other libraries (number will be supplied by the Indiana State Library)
08-003 SRCS materials provided to other libraries (number will be supplied by the Indiana State Library)
08-004 Total number of loans provided to other libraries

08-005 Number of interlibrary loan items (loans and photocopies) your library has borrowed from other Indiana libraries.
08-006 Evergreen Transits received from other libraries (number will be supplied by the Indiana State Library)
08-007 SRCS materials received from other libraries (number will be supplied by the Indiana State Library)
08-008 Total number of loans received from other libraries.

08-009 Net Lending Rate (Number of items loaned divided by number of items borrowed)
Programs

Children's (0-11 years) Programs
08-010  Number of children's (0-11 years) programs held in the library
08-011  Number of children's (0-11 years) programs held outside of the library

Young Adult (12-18 years) Programs
08-012  Number of young adult (12-18 yrs) programs held in the library
08-013  Number of young adult (12-18 yrs) programs held outside of the library

Adult (18+ years) Programs
08-014  Number of adult (18+ yrs) programs held in the library
08-015  Number of adult (18+ yrs) programs held outside of the library

General Programs
08-016  Number of general (all ages) programs held in the library
08-017  Number of general (all ages) programs held outside of the library
Programs

08-018 Total number of non-library sponsored programs
08-019 Total number of all library-sponsored programs
Program Attendance

08-020 Attendance at Children's (0-11 years) programs held in the library

08-021 Attendance at Children's (0-11 years) programs held outside of the library
    Repeats for:
    Young Adult (12-18 yrs) Programs
    Adult (18+ yrs) Programs
    General (All ages) Programs

Attendance Totals

08-028 Total attendance at non-library sponsored programs
08-029 Total children's program attendance
08-030 Total young adult program attendance
08-031 Total program attendance at library-sponsored programs
Part 8 – Library Service and Technology

08-032 How many weeks of a Summer Reading Program for Children did your library offer at each fixed location?

08-033 Total number of annual visits in the library

08-034 Total number of reference transactions per year

Electronic Collections (Includes Licensed Databases)

08-035 Number of State Licensed Databases (INSPIRE)

08-036 Number of local and other (Not INSPIRE) licensed databases

08-037 Name(s) of public use/commercial databases to which the library subscribes

08-038 Total electronic collections
Public Computers

08-039 Public Internet-connected computers uses per year
08-040 Number of wireless hubs located in the central building?
08-041 Total number of wireless hubs, system-wide
08-042 Number of wireless internet uses per year
08-043 Number of Internet connected public computers, system-wide.
08-044 Number of scanners available for the public, system-wide.
08-045 Number of Internet connected staff computers, connected to a printer.
08-046 Number of persons potentially served by each public computer
Library System Automation

08-047 Does your library have an automated bookkeeping system? Y/N
08-048 Name of bookkeeping system.
08-049 Brand and version of integrated library system (ILS)
08-050 Is your library catalog available online? Y/N
Part 9 – Circulation and Holdings

• New questions to capture electronic collection/database uses
• Per PLS:

  • Report the number of units. Report only items that have been **purchased, leased or licensed** by the library, a consortium, the state library, a donor or other person or entity.

  • Included items must only be **accessible with a valid library card or at a physical library location**; inclusion in the catalog is not required. Do not include items freely available without monetary exchange.

  • Do not include items that are permanently retained by the patron; count only items that have a **set circulation period** where it is available for their use.

  • Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.
09-001  Circulation of Physical Items

09-002  Use of Electronic Materials (e.g. E-books circulated or electronic materials downloaded annually)

09-003  NEW: Successful Retrieval of Electronic Information (e.g. Electronic material usage or views not meeting the definition of circulation and not otherwise reported in 09-002)

09-004  Total Electronic Content Use (total of 09-002 and 09-003)

09-005  Circulation of Children's Materials

09-006  Total Circulation of All Materials (total of 09-001 and 09-002)

09-007  NEW: Total Collection Use (total of 09-001 and 09-004)

09-008  Total In-house Usage of Materials

09-009  Number of Electronic Book Reading or Music Playing Devices Circulated Annually
Selected Holdings

09-010  Books (Print)

09-011  Does the library belong to an Ebook consortium?
09-012  Name of Ebook Consortium

09-013  Electronic books (E-books) (LOCAL HOLDINGS)
09-014  Electronic books (E-books) (CONSORTIUM HOLDINGS)
09-015  Electronic books (E-books) (TOTAL)
A/V Material Holdings:

09-016  Video Materials - Physical Units
09-017  Video Materials - Downloadable Titles (LOCAL HOLDINGS)
09-018  Video Materials - Downloadable Titles (CONSORTIUM HOLDINGS)
09-019  Video Materials - Downloadable Titles (TOTAL)

09-020  Audio Materials - Physical Units
09-021  Audio Materials - Downloadable Titles (LOCAL HOLDINGS)
09-022  Audio Materials - Downloadable Titles (CONSORTIUM HOLDINGS)
09-023  Audio Materials - Downloadable Titles (TOTAL)
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-024</td>
<td>Electronic (Physical) Format</td>
</tr>
<tr>
<td>09-025</td>
<td>Number of Electronic Book Reading or Music Playing Devices Owned by the Library</td>
</tr>
<tr>
<td>09-026</td>
<td>Current Print Serial Subscriptions</td>
</tr>
<tr>
<td>09-027</td>
<td>Current Electronic Serials Subscriptions</td>
</tr>
</tbody>
</table>
Part 10 - Library Board
Some notes on completing this section:

- Provide **most current** info available (e.g. February additions)
- Provide any updates throughout the year to ISL.
- We have pre-filled last year’s info. Please verify and update as needed.
- Be sure to only list a **Treasurer** OR **Treasurer/employee** (NOT BOTH)
- If a position is vacant, you may enter “Vacant” in any required fields
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-0001</td>
<td>Position</td>
</tr>
<tr>
<td>10-0002</td>
<td>First Name</td>
</tr>
<tr>
<td>10-0003</td>
<td>Middle Initial/Name</td>
</tr>
<tr>
<td>10-0004</td>
<td>Last Name</td>
</tr>
<tr>
<td>10-0005</td>
<td>Home address</td>
</tr>
<tr>
<td>10-0006</td>
<td>City</td>
</tr>
<tr>
<td>10-0007</td>
<td>Zip Code</td>
</tr>
<tr>
<td>10-0008</td>
<td>E-mail address</td>
</tr>
<tr>
<td>10-0009</td>
<td>Appointing Authority</td>
</tr>
<tr>
<td>10-0010</td>
<td>Date that the current term expires</td>
</tr>
<tr>
<td>10-0011</td>
<td>Number of consecutive terms</td>
</tr>
<tr>
<td>10-0012</td>
<td>Date of initial appointment</td>
</tr>
</tbody>
</table>

(REPEATS...)
Part 11 - Salary Section

• No changes here
• Provide most current information (e.g. 2017 salaries, if known)
• Provide info for positions not currently occupied
Part 11 - Salary Section

Director:

11-001 Annual salary of the Director
11-002 Does the Director have an employment contract? Y/N
11-003 What is the current level of certification for the library Director?

All other Positions:

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Cert. Level Required</th>
<th>Min Hourly</th>
<th>Max Hourly</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-004 Assistant or Associate Director</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>11-008 Department Head, Manager or Supervisor</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>11-012 Branch Head</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>11-016 Administrative Assistant</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>--------------------------------------------------</td>
<td>-----</td>
<td></td>
</tr>
<tr>
<td>11-501</td>
<td>PERF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-502</td>
<td>Deferred Compensation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-503</td>
<td>Health Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-504</td>
<td>Health Savings Account (HSA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-505</td>
<td>Dental Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-506</td>
<td>Life Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-507</td>
<td>Vision Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-508</td>
<td>Disability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-509</td>
<td>Paid Time off for Continuing Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-510</td>
<td>Reimbursement for Continuing Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-511</td>
<td>Other1 (specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-512</td>
<td>Other2 (specify)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Employee Fringe Benefit Information - **Part-time** Employees**

<table>
<thead>
<tr>
<th>Code</th>
<th>Benefit</th>
<th>Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-513</td>
<td>PERF</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-514</td>
<td>Deferred Compensation</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-515</td>
<td>Health Insurance</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-516</td>
<td>Health Savings Account (HSA)</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-517</td>
<td>Dental Insurance</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-518</td>
<td>Life Insurance</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-519</td>
<td>Vision Insurance</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-520</td>
<td>Disability</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-521</td>
<td>Paid Time off for Continuing Education</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-522</td>
<td>Reimbursement for Continuing Education</td>
<td>Y/N</td>
</tr>
<tr>
<td>11-523</td>
<td>Other1 (specify)</td>
<td></td>
</tr>
<tr>
<td>11-524</td>
<td>Other2 (specify)</td>
<td></td>
</tr>
</tbody>
</table>
Part 11 - Salary Section

Paid days off per year –

Full-time Librarian

11-525 Number of Vacation Days
11-526 Number of Sick Days
11-527 Number of Personal Days
11-528 Holidays
11-529 Funeral/Bereavement
11-530 Other Days (specify)

Repeats for

...Part-Time Librarian
...Full-Time Support Staff
...Part-Time Support Staff
Part 12 - PLAC Loans

• No changes here
• Don’t report any PLAC loans to your own library
• Don’t include reciprocal loans or nonresident loans (unless using PLAC card)
• You do NOT need to enter “0” for libraries with no loans- just skip them! 😊
<table>
<thead>
<tr>
<th>12-001</th>
<th>Did your library make any PLAC loans?</th>
<th>Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-002</td>
<td>Adams Public Library System</td>
<td></td>
</tr>
<tr>
<td>12-003</td>
<td>Akron Carnegie Public Library</td>
<td></td>
</tr>
<tr>
<td>12-004</td>
<td>Alexandria-Monroe Public Library</td>
<td></td>
</tr>
<tr>
<td>12-005</td>
<td>Alexandrian Public Library</td>
<td></td>
</tr>
<tr>
<td>...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12-238</td>
<td>Yorktown Public Library</td>
<td></td>
</tr>
</tbody>
</table>

| 12-239 | Total PLAC Loans                      |     |
Part 13 – Compliance with Standards for Public Libraries

• Answer very carefully.
  • “No” responses *may* trigger a communication from ISL.

• Use the clarification prompts, federal notes, or Part 14 to explain any “standards issues.”
Part 13 - Standards

13-001 Does your library comply with **Public Library Law IC 36-12**? Y/N

13-002 If the answer to 13-001 is NO, explain:

13-003 Does your library comply with **other Indiana laws** that affect municipal corporations? Y/N

13-004 If the answer to 13-003 is NO, explain:

13-005 Does your library comply with **all federal laws** affecting employment practice? Y/N

13-006 If the answer to 13-005 is NO, explain:
13-007  Are all newly constructed and existing library facilities in compliance with local, state, and federal building and health and safety codes?  Y/N

13-008  If the answer to 13-007 is NO, explain:

13-009  Does the library comply with provisions of the federal Americans with Disabilities Act to make its physical and digital services available to everyone?  Y/N

13-010  If the answer to 13-009 is NO, explain:
The Board and Director

13-011  Do the library board and the director maintain separate functions?  Y/N
13-012  Is the board responsible for governance and policy?  Y/N
13-013  Is the director responsible for administration, operation and management of the library?  Y/N
13-014  Does the director work full-time?  Y/N
13-015  Does the Director have the required certification under 590 IAC 5?  Y/N
With the advice and recommendations of the library director, has the library board adopted the following policies and procedures?

13-016  An annual classification of employees    Y/N
13-017  Schedules of salaries            Y/N
13-018  A proposed library budget        Y/N
13-019  Library policies                 Y/N
13-020 Has the library board adopted the written employment practices dealing with recruitment? Y/N
13-021 . . . selection? Y/N
13-022 . . . appointments? Y/N
13-023 . . . personnel actions? Y/N
13-024 . . . salary administration? Y/N
13-025 . . . employee benefits? Y/N
13-026 . . . the conditions of work? Y/N
13-027 . . . leaves? Y/N
Boards and Bylaws

13-028 Does the library board adhere to the current approved principles provided by the Indiana State Library for library trustees? Y/N

13-029 ...have current, written bylaws that state its purpose and its operational procedures? Y/N

13-030 Do the bylaws specifically state rules governing conflicts of interest issues? Y/N

13-031 Do the library bylaws specifically state rules governing nepotism? Y/N

13-032 Have the bylaws been reviewed by the board in the last three (3) years? Y/N

13-033 Has a copy of the current version of the bylaws, along with all of the amendments approved by the library board been submitted to the Indiana State Library? Y/N
Part 13 - Standards

13-034 Does your library have a written *collection development plan*? Y/N

13-035 Does your library have a written *circulation policy* detailing the principles of access for all library materials and service? Y/N

13-036 Does your library provide *support for continuing education* for staff and trustees? Y/N
Part 13 - Standards

Long Range Plan

13-037 Does the library have a written long-range plan of service? Y/N
13-038 Which year did your current long range plan begin?
13-039 Which year does your current long range plan end?
13-040 Has your long-range plan been updated in the last three (3) to five (5) years (depending on the length of the plan?) Y/N
Part 13 - Standards

Long Range Plan

13-041 Have copies of the plan, plus all updates and revisions **been filed** with the Indiana State Library? Y/N

13-042 Does your long-range plan include a **statement of community needs and goals**? Y/N

13-043 Does your long-range plan include **measurable objectives** and service in response to the community's needs and goals? Y/N
Part 13 - Standards

Long Range Plan

Does your long-range plan include:

13-044 an assessment of facilities, services, technology, and operations? Y/N

13-045 an ongoing annual evaluation process? Y/N

13-046 a plan for financial resources and sustainability? Y/N

13-047 a statement of collaboration with other public libraries? Y/N

13-048 a statement of collaboration with other community partners? Y/N
Does your technology plan include...

13-054 ...realistic goals and strategies for using telecommunications and information technology? Y/N
13-055 ...a professional development strategy? Y/N
13-056 ...an assessment of telecommunication services, hardware, software, and other services needed? Y/N
13-057 ...an equipment replacement schedule? Y/N
13-058 ...a plan for financial resources and sustainability? Y/N
13-059 ...an ongoing annual evaluation process? Y/N
13-060 ...an automated, integrated library system (ILS) which conforms to a national cataloging standard? Y/N
Resource Sharing

13-061  Does your library provide interlibrary loan free of charge to other libraries within Indiana? Answer YES if your policy is to lend, even if no loans were requested. Y/N

13-062  Does your library provide interlibrary loan free of charge to your users? Answer YES if your policy is to lend, even if no loans were requested. Y/N

13-063  Does the library lend materials via a statewide reciprocal borrowing program? Y/N

13-064  Does the library lend materials using a local reciprocal borrowing agreement with at least one (1) other public library district within Indiana? Y/N

13-065  If the answer to 13-064 is yes, please list libraries with which you have reciprocal borrowing agreements.
Part 13 - Standards

Resource Sharing

13-066 Does the library lend materials using the OCLC Resource Sharing system? Y/N
13-067 Is the library a member of Evergreen Indiana? Y/N
13-068 How many days per week does your library receive INfo Express courier service?
Does the library provide services for adults, including:

13-069 Programs and reference services offered by an appropriately certified librarian? Y/N
13-070 Access to reference materials, including INSPIRE? Y/N
13-071 A collection of materials for adults? Y/N
13-072 A space designated in the library for adult services? Y/N
13-073 Does the library provide an enhanced level of adult service by providing:
1) One (1) or more staff, with appropriate certification;
2) Serving at least part time,
3) At each fixed location?  [All conditions must apply]  Y/N

13-074 Does the library provide an exceptional level of adult service by providing:
1) One (1) full-time staff member, or the equivalent,
2) With appropriate certification,
3) At each fixed location?  [All conditions must apply]  Y/N
Part 13 - Standards

Library Services for Young Adults and Children-

- The previous questions repeat for these age groups. (Questions 13-075 through 13-085)
Standards related to Public Access:

13-086 Are patrons who are unable to read regular print, because of visual or physical disability, provided access to large print books, Braille books, audio books, and enhanced media? Y/N

13-087 Does the library provide computers for the free use of all persons regardless of residency? Y/N

13-088 Does your library provide a means for the public to make copies at each location? Y/N
The Library’s Webpage

Does it include...

13-089  ...current hours of operation?       Y/N
13-090  ...a physical address for your library? Y/N
13-091  ...a map for each fixed location?     Y/N
13-092  ...a public telephone number?         Y/N
13-093  ...a public e-mail address or other means of electronic contact? Y/N
13-094  ...a link to INSPIRE and other free electronic resources? Y/N
13-095  ...publicly posted policies, including, but not limited to, circulation policies, fees, and internet use policies? Y/N
The Library’s Webpage – Other requirements

13-096 Has your Internet Policy been reviewed by the board in the last year? Y/N

13-097 Does your library's webpage include a link to the library's online public access catalog? Y/N

13-098 Does your library's webpage include a calendar or list of events and programs which is updated at least monthly? Y/N
Part 14 – Statement of Intent to Comply with Standards

- Please explain any NO answers given in Part 13.
- Please include the question number (###-####) and an explanation for each question where you answered “NO” to any question in Part 13.
Part 15 - Supplement

- All new – questions change each year
What we’re asking for 2016:

- Interlibrary Loan contact info
- DNR Parks Pass Program (circulations/new patrons)
- Summer Reading
  - Participation
  - Trends
  - Alternative Programs
- Library WiFi
  - Circulating Hotspots and After-hours public access
- Electronic Access Cards
- LEUS issued locally
- Library Fines
- Success Stories
Certifying your Report

- Last section of report.
- Click link to open and print page.
- Sign, give to Board President to review, sign.
- Mail to ISL. If completing report at the last minute, please drop in mail on March 1st.
Submitting the report

Step 1: Go to the “Status” tab - Clear up any edit checks if needed by making corrections or annotating with a Federal Note.
Submitting the report

Step 2: Go to the “Status” tab OR the “Submit Survey” tab – click green button
Do a happy dance!