2018 Public Library Annual Report Workshop

Library Development Office – Angela Fox – November 2018
WHAT IS THE ANNUAL REPORT?

Only annual collection of public library data
IMLS core questions, ISL add-ons

“...PLS data are useful to researchers, journalists, the public, local practitioners, and policymakers at the federal, state, and local levels, and are used for planning, evaluation, and policy making.”

~800 questions
WHY FILL OUT THE ANNUAL REPORT?

**Your public**
- Jobseekers, researchers, journalists
- Transparency

**Your library**
- Year-to-year comparisons
- Compare to other libraries
- Obtain statistics to support budget requests
- Analyze and respond to community needs

**ISL/IMLS**
- Historical document
- Year-to-year comparisons across state
- Identifying trends
- Checking standards compliance (ISL)
WHAT'S DIFFERENT IN 2018?
CHANGES TO THIS YEAR’S REPORT

- **Part 1 – General Information**
  - Eliminating questions related to internet access in bookmobiles

- **Part 3 – Libraries and Political Subdivisions**
  - Replacing BIRF and *lease rental tax rate* rental tax rate with *debt fund tax rate*
  - LOCKED field 03-013 through 03-019 (political subdivisions)
  - Added question 03-020: Were there any changes to your service area in 2018?

- **Part 4 - Income**
  - Library operating Fund Income
  - Multiple questions deleted / merged
  - State Technology Grant Fund has its own question – and the amount will be prefilled by ISL
CHANGES TO THIS YEAR’S REPORT

- Part 8 – Library Services and Technology
  - Add question on hotspots

- Add question on **number of website hits**. (New requirement from IMLS for 2018):
  - 08-041 Number of public internet computer uses per year
    - **Definition**: Visits represent the annual number of sessions initiated by all users from inside or outside the library to the library website. The library website consists of all webpages under the library’s domain. A website “visit” or “session” occurs when a user connects to the library’s website for any length of time or purpose, regardless of the number of pages or elements viewed. Used of library social media accounts (e.g., Facebook, Twitter, etc.) should not be reported here.
    
    **Reasoning**: Traditional output measures such as visits, circulation, and program attendance are increasingly inadequate to capture the wide variety of ways that people use the library. A grouping number of people use library services via library websites without ever setting foot in the building, and a subset of those who visit the building use the library website during their visit. If we don’t track website visits, then the story we can tell about library usage is at best incomplete. In addition, tracking virtual use measures such as website visits gives us the ability to provide a counter-narrative to the claim that library use (i.e., physical visits) is decreasing.
CHANGES TO THIS YEAR’S REPORT

- Part 11 – Salary Section
  - Eliminated multiple jobs with less than 20 respondents
    - Audio visual librarian
    - Secretary or Receptionist
    - Security
    - Bookmobile Driver
    - Messenger / Courier

- Part 15 – Supplemental Questions
  - Fines
  - Consultants
  - Professional Development/Continuing Education
  - One-on-one services
**TIMELINE**

**Nov 2018**
- Annual Report Workshop
- Gather data

**Dec 2018**
- Survey goes live mid-month
- Directors will receive email w/login instructions

**Jan-Feb 2019**
- Procrastination and/or the completing of the survey

**Mar 1 2019**
- Survey closed
NAVIGATING THE SURVEY

- Firefox or Internet Explorer recommended
  - Will need to activate Compatibility View for IE 10 or higher

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

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

- Click Save and Logout to close and return to the report at any time

- Click SHOW LAST YEAR’S ANSWERS to see last year’s input
SURVEY INTERFACE

• Use Tabs to navigate
  • Home
  • Survey
  • Status
  • Printing
  • Submit Survey
  • Frequent Questions
  • Instructions
EDIT CHECKS AND NOTES

Need to explain something?

- 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 – passed along to ISL/AIR
  - Local – 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
STARTING THE SURVEY

Keep your data close, and your coffee closer.
• Log-in/password, help contacts
• Accurate statistics from your staff, circulation, and bookkeeping systems
• Caffeine
TECHNICAL DIFFICULTIES?

• Check with your IT person/department
  • Local issues: firewalls, browsers, etc.

• Contact ISL
  • 1-800-451-6028
  • (317) 234-6550
  • Can edit prefilled responses, retrieve passwords

• Call Bibliostat
  • 1-866-785-9935
INSTRUCTIONS

Timeframe

You will be reporting on the 2018 calendar year.

Exceptions: - Give the most current information (e.g. early 2019) 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 is not 0, but you don’t know what it is and are unable estimate it.
COLOR KEY

OX – 001 Question

OX – 002 Standards question

OX – 003 Prefilled

OX – 004 Prefilled and locked (contact ISL to change)

OX – 005 Calculated total
GENERAL INFORMATION  PART 1
### 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 code</td>
</tr>
<tr>
<td>01-010</td>
<td>Is your mailing address the same as the address listed 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 code</td>
</tr>
</tbody>
</table>
## PART 1 — GENERAL INFORMATION

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 email address, or means of electronic contact listed on the library’s website</td>
</tr>
</tbody>
</table>
PART 1 — GENERAL INFORMATION

01-020 Year the current central library was built

01-021 Year of the most recent structural addition or alteration to the current central library

01-022 Square footage of the central library
PART 1 — GENERAL INFORMATION

01-023 Click here to complete
Central Library daily
hours

01-024 Monday opening time
01-025 Monday closing time

--continued--

01-036 Sunday opening time
01-037 Sunday closing time

Formatting/spacing is important.

eg: 10:00 AM, not 10:00AM
01-038  Total open hours for the central library during a typical week

01-039  Total number of hours per week the central library is open after 5:00 pm

01-040  Total number of hours per week the central library is open on Saturday

01-041  Total number of hours per week the central library is open on Sunday

01-042  Number of weeks per year the central library was open in 2018

01-043  Total hours the central library was open in 2018
PART 1 — GENERAL INFORMATION

01-044 Does the library have internet access? Y/N

01-045 What type of internet access is available in the central library?

01-046 Specify the download speed of internet access in the central library.

Please specify the unit of measurement (e.g. 20 MBPS)
PART 1 — GENERAL INFORMATION

Use Remove Group/Add Group to remove or add branches

01-200 Total number of branches. (If this answer = 0, skip questions 01-200a through 01-237)
PART 1 — GENERAL INFORMATION

01-200a Branch name
01-201a Branch street address
01-202a Branch city
01-203a Branch county
01-204a Branch ZIP
01-205a Is your mailing address the same as the address listed above?
01-206a Branch mailing address
01-207a Phone
01-208a Fax
01-209a Total square footage of branch
01-210a Year built
01-211a Year of the most recent structural addition/alteration to branch building
PART 1 — GENERAL INFORMATION

01-0212 Number of weeks per year individual branch is open

01-213a Monday opening time

01-214a Monday closing time

— continued —

01-226a Sunday closing time

01-227a Total open hours for the branch during a typical week
01-228a Does the branch library have internet access? Y/N

01-229a What type of internet access is available in the branch library? (options)

01-230a Specify the speed of internet access in the branch library

01-237 Total annual hours of all branches
<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-300</td>
<td>Total number of bookmobiles.</td>
</tr>
<tr>
<td>(If this answer = 0, skip questions 01-301a through 01-316)</td>
<td></td>
</tr>
<tr>
<td>01-301a</td>
<td>Bookmobile name</td>
</tr>
<tr>
<td>01-302a</td>
<td>Street address</td>
</tr>
<tr>
<td>01-303a</td>
<td>City</td>
</tr>
<tr>
<td>01-304a</td>
<td>County</td>
</tr>
<tr>
<td>01-305a</td>
<td>ZIP</td>
</tr>
<tr>
<td>01-306a</td>
<td>Is your mailing address the same as the address listed above?</td>
</tr>
<tr>
<td>01-307a</td>
<td>Mailing address</td>
</tr>
<tr>
<td>01-308a</td>
<td>Phone</td>
</tr>
<tr>
<td>01-309a</td>
<td>Fax</td>
</tr>
</tbody>
</table>
PART 1 — GENERAL INFORMATION

01-310a  Total number of hours bookmobile is open during a typical week

01-311a  Number of weeks per year bookmobile is open

01-312  Total annual hours of all bookmobiles

01-500  Total system public service hours per year (central + branches + bookmobiles)
CHANGES TO YOUR REGISTRATIONS?

• 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 resident registered users
02-002 Total number of users from contracting areas
02-003 Total number of 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 non-resident fee
02-010 Date the library board adopted this fee
02-011 Does your library annually purge or mark inactive accounts for patrons who have not used their accounts for three years and do not owe materials, fines, or fees to the library? Y/N
## PART 3 — LIBRARIES AND POLITICAL SUBDIVISIONS

<table>
<thead>
<tr>
<th>03-001</th>
<th>Name of primary county</th>
<th>03-008</th>
<th>Name of additional county</th>
</tr>
</thead>
<tbody>
<tr>
<td>03-002</td>
<td>Totaled assessed valuation for library district</td>
<td>03-009</td>
<td>Total assessed valuation for <strong>additional county</strong></td>
</tr>
<tr>
<td>03-003</td>
<td>Operating tax rate</td>
<td>03-010</td>
<td>Operating tax rate for additional county</td>
</tr>
<tr>
<td>03-004</td>
<td>Source year for data</td>
<td>03-011</td>
<td>Debt fund rental tax rate</td>
</tr>
<tr>
<td>03-005</td>
<td>Debt fund tax rate</td>
<td>03-012</td>
<td>LCPF tax rate</td>
</tr>
<tr>
<td>03-006</td>
<td>LCPF tax rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03-007</td>
<td>Did your library roll the LCPF into the operating tax rate? Y/N</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PART 3 — LIBRARIES AND POLITICAL SUBDIVISIONS

03-013 Total district population without contracts

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 and served)

03-018 Type of political unit (contracting units 5, 6, 7, 8, 10 only)

03-019 Population 2010 census (served by contract)

03-020 Were there any changes to your library’s service area? (Reasons for change may include annexations, mergers, or changes in contracts.)

03-021 If the answer to 03-020 is YES, please explain
03-008 Additional county info is only required of libraries crossing county lines and the four county-contractuals

03-016 Type of political unit — taxed units
   • 1 (city/town)
   • 2 (more than ½ 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
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04-001</td>
<td>Property tax or CEDIT income from library tax rate</td>
</tr>
<tr>
<td>04-002</td>
<td>Miscellaneous income taxes or LIT (Local Income Tax)</td>
</tr>
<tr>
<td>04-003</td>
<td>Contractual revenue received for service</td>
</tr>
<tr>
<td>04-004</td>
<td>Total local income</td>
</tr>
</tbody>
</table>
PART 4 — LIBRARY INCOME

04-005 Financial Institutions Tax (FIT)

04-006 License Vehicle Excise Tax

04-007 Commercial Vehicle Excise Tax (CVET)

04-008 State Technology Grant Fund

04-009 Other state income

04-010 Source(s)

04-011 Total state income
PART 4 — LIBRARY INCOME

04-012 LSTA grants

04-013 Other federal income

04-014 Source(s)

04-015 Total federal income
PART 4 — LIBRARY INCOME

04-016  PLAC reimbursement
04-017  Fines and fees
04-018  Interest on investments
04-019  Gift receipts income
04-020  Private and public foundation grants income
04-021  Miscellaneous income
04-022  Source(s)
04-023  Total other income
04-024  Total income
PART 5 — EXPENDITURE DATA

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

05-006 Total supplies
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
</tr>
<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</td>
</tr>
<tr>
<td>05-017</td>
<td>Total of other services and charges</td>
</tr>
</tbody>
</table>
PART 5 — EXPENDITURE DATA

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, e-readers and electronic media devices

DO NOT report in Q05-021
05-023 Books (include book lease)

05-024 Periodicals and newspapers

05-025 Audio/visual materials, non-printed (physical) materials, and microforms, not electronic

05-026 E-book, electronic collections, and database licensing/purchase/lease expenditures

05-027 Electronic physical format, including Playaways and e-readers
PART 5 — EXPENDITURE DATA

Non-Operating Fund
Material Expenditures

05-028 Books (include books lease)

05-029 Periodicals and newspapers

05-030 Audio/visual materials, non-printed (physical materials), and microforms, not electronic

05-031 E-book and electronic database licensing/purchase/lease expenditures

05-032 Electronic physical format, including Playaways and e-readers
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
05-038 Total operating fund expenditure for collection development
05-039 Total non-operating fund expenditure for collection development
05-040 Public access computers, e-readers, and electronic media devices from all non-operating funds
PART 5 — EXPENDITURE DATA

05-041  Total operating fund expenditures

05-042  Other operating fund expenditures

05-043  Total operating expenditures

05-044  Total capital fund expenditures

Totals
PART 5 — EXPENDITURE DATA

05-045 Total collection expenditures

05-046 Total 2017 operating expenditures per capita (for this year’s standards calculations)

05-047 Difference between 2017 OE per capita and non-resident fee (subtract 02-009 from 05-046)

05-047a Does your library’s non-resident fee meet the standard?

(Select YES if 05-047 is a negative number; NO if it is a positive number)

05-048 Total 2018 operating expenditures per capita (for next year)

Please make sure your 2019 non-resident fee is equal or greater than this amount.
PART 5 – EXPENDITURE DATA

Collection Development Standard

05-049  Collection development expenditure (from all funds) as a percentage of the operating fund expenditure

8%
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 renovations 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
- 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).
PART 6 — CAPITAL REVENUE

06-001 Local government capital revenue

06-002 State government capital revenue

06-003 Federal government capital revenue

06-004 Other capital revenue

06-005 Total capital revenue
PART 7 — EMPLOYMENT DATA

Librarians

07-001 Total number of all librarians with an ALA-MLS
07-002 Total number of paid hours per week for all ALA-MLS librarians
07-003 FTE for all librarians with an ALA-MLS

07-004 Total number of all librarians, including ALA-MLS librarians
07-005 Total number of paid hours per week for all librarians, including ALA-MLS librarians
07-006 FTE for all librarians
### PART 7 — EMPLOYMENT DATA

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>07-007</td>
<td>Total number of other paid staff</td>
</tr>
<tr>
<td>07-008</td>
<td>Total number of paid hours 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 number of paid hours 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

Interlibrary Loans

08-001 Number of interlibrary loan items (loans and photocopies) your library has provided to other libraries
08-002 Evergreen transits to other libraries (number will be supplied by the ISL)
08-003 SRCS materials provided to other libraries (number will be supplied by the ISL)
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 libraries
08-006 Evergreen transits from other libraries (number will be supplied by the ISL)
08-007 SRCS materials received from other libraries (number will be supplied by ISL)
08-008 Total number of loans received from other libraries
08-009 Net lending rate (# items loaned/# items borrowed)
### Programs

#### Children's (0-11 years) Library Programs

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08-010</td>
<td>Number of Children's (0-11 years) programs held in the library</td>
</tr>
<tr>
<td>08-011</td>
<td>Number of Children's (0-11 years) programs held outside of the library</td>
</tr>
</tbody>
</table>

#### Young Adult (12-18 years) Library Programs

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08-012</td>
<td>Number of Young Adult (12-18 years) programs held in the library</td>
</tr>
<tr>
<td>08-013</td>
<td>Number of Young Adult (12-18 years) programs held outside of the library</td>
</tr>
</tbody>
</table>

#### Adult (18+ years) Library Programs

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08-014</td>
<td>Number of Adult (18+ years) programs held in the library</td>
</tr>
<tr>
<td>08-015</td>
<td>Number of Adult (18+ years) programs held outside of the library</td>
</tr>
</tbody>
</table>

#### General (All Ages) Library Programs

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08-016</td>
<td>Number of General (all ages) programs held in the library</td>
</tr>
<tr>
<td>08-017</td>
<td>Number of General (all ages) programs held outside of the library</td>
</tr>
</tbody>
</table>
PART 8 — LIBRARY SERVICE AND TECHNOLOGY

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 programs held in the library
08-021 Attendance at children’s programs held outside of the library

*Repeat for young adult, adult, and general

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 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 to the library

08-034 Total number of reference transactions per year
## PART 8 — LIBRARY SERVICE AND TECHNOLOGY

### Electronic Collections
(Includes Licensed Databases)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08-035</td>
<td>Number of state-licensed databases (INSPIRE)</td>
</tr>
<tr>
<td>08-036</td>
<td>Number of local and other licensed databases (not INSPIRE)</td>
</tr>
<tr>
<td>08-037</td>
<td>Name(s) of public use/commercial databases to which the library subscribes</td>
</tr>
<tr>
<td>08-038</td>
<td>Total electronic collections</td>
</tr>
</tbody>
</table>
PART 8 — LIBRARY SERVICE AND TECHNOLOGY

Public Computers

08-039  Number of public internet computer uses per year

08-040  Number of wireless internet uses per year

08-041  Number of website visits

08-042  Number of public computers system-wide

08-043  Number of staff computers
08-043  Does your library have an automated bookkeeping system? Y/N

08-044  Name of bookkeeping system

08-045  Brand and version of Integrated Library System (ILS)
CIRCULATION AND HOLDINGS

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.
PART 9 — CIRCULATION AND HOLDINGS

09-001 Circulation of physical items
09-002 Use of electronic materials (e.g. e-books circulated or electronic materials downloaded annually)
09-003 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 (sum of 09-002 and 09-003)
09-005 Circulation of all children’s materials
09-006 Total circulation of all materials (sum of 09-001 and 09-002)
09-007 Total collection use (sum of 09-001 and 09-004)
09-008 Total in-house usage of materials
09-009 Books (print)

09-010 Does the library belong to an e-book consortium?

09-011 Name of e-book consortium

09-012 E-books (LOCAL HOLDINGS)

09-013 E-books (CONSORTIUM HOLDINGS)

09-014 E-books (TOTAL)
PART 9 — CIRCULATION AND HOLDINGS

Selected Holdings

09-015 Video materials — physical units

09-016 Video materials — downloadable units
   (LOCAL HOLDINGS)

09-017 Video materials — downloadable units
   (CONSORTIUM HOLDINGS)

09-018 Video materials — downloadable units (TOTAL)

09-019 Audio materials — physical units

09-020 Audio materials — downloadable units
   (LOCAL HOLDINGS)

09-021 Audio materials — downloadable units
   (CONSORTIUM HOLDINGS)

09-022 Audio materials — downloadable units (TOTAL)

09-023 Current print serial subscriptions

09-024 Current electronic serials subscriptions
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
LIBRARY BOARD

10-0001 Position: President
10-0002 First name
10-0003 Middle initial/name
10-0004 Last name
10-0005 Home address
10-0006 City
10-0007 ZIP code
10-0008 E-mail address
10-0009 Appointing authority
10-0010 Date term expires
10-0011 Number of consecutive terms
10-0012 Date of initial appointment
Repeated for:

* Vice president
* Secretary
* Treasurer (OR Treasurer/Employee)
* Members

10-0991 What day of the month is the regular library board meeting?

10-0992 What is the time of the regular library board meeting?
SALARY DATA

Provide most current information (2019 salaries, if known)

Provide info for positions not currently occupied

Looking for salary schedule - not necessarily what current position-holders make
PART 11 — SALARY DATA

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>
</tbody>
</table>
PART 11 — SALARY DATA

Benefits – Full-Time

11-501  PERF
11-502  Deferred compensation
11-503  Health insurance
11-504  Health Savings Account (HSA)
11-505  Dental insurance
11-506  Life insurance
11-507  Vision insurance
11-508  Disability insurance
11-509  Paid time off for continuing education
11-510  Reimbursement for continuing education
11-511  Other 1 (specify)
11-512  Other 2 (specify)
### Benefits – Part-Time

<table>
<thead>
<tr>
<th>Code</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-501</td>
<td>PERF</td>
</tr>
<tr>
<td>11-502</td>
<td>Deferred compensation</td>
</tr>
<tr>
<td>11-503</td>
<td>Health insurance</td>
</tr>
<tr>
<td>11-504</td>
<td>Health Savings Account (HSA)</td>
</tr>
<tr>
<td>11-505</td>
<td>Dental insurance</td>
</tr>
<tr>
<td>11-506</td>
<td>Life insurance</td>
</tr>
<tr>
<td>11-507</td>
<td>Vision insurance</td>
</tr>
<tr>
<td>11-508</td>
<td>Disability insurance</td>
</tr>
<tr>
<td>11-509</td>
<td>Paid time off for continuing education</td>
</tr>
<tr>
<td>11-510</td>
<td>Reimbursement for continuing education</td>
</tr>
<tr>
<td>11-511</td>
<td>Other 1 (specify)</td>
</tr>
<tr>
<td>11-512</td>
<td>Other 2 (specify)</td>
</tr>
</tbody>
</table>
### PART 11 — SALARY DATA

#### Paid Days Off Per Year

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Full-time Librarian</th>
<th>Repeats for</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-525</td>
<td>Number of vacation days</td>
<td></td>
<td>...Part-time Librarian</td>
</tr>
<tr>
<td>11-526</td>
<td>Number of sick days</td>
<td></td>
<td>...Full-time Support Staff</td>
</tr>
<tr>
<td>11-527</td>
<td>Number of personal days</td>
<td></td>
<td>...Part-time Support Staff</td>
</tr>
<tr>
<td>11-528</td>
<td>Number of holidays</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-529</td>
<td>Number of funeral/bereavement days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-530</td>
<td>Other days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PLAC LOANS | PART 12
PART 12 — PLAC LOANS

Don’t report any PLAC loans to your library
Don’t include reciprocal loans or nonresident loans (unless using a PLAC card)
You do NOT need to enter “0” for libraries - just skip them!
PART 12 — PLAC LOANS

12-001 Did your library make any PLAC loans?  Y/N

12-002 Adams Public Library System
12-003 Akron Carnegie Public Library
12-004 Alexandria-Monroe Public Library
12-005 Alexandrian Public Library
...
12-237 Yorktown Public Library

12-238 Total PLAC Loans
COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

PART 13
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

Answer carefully; a “no” response may trigger a communication from ISL

Use the clarification prompts, federal notes, or Part 14 to explain any standards issues
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

13-001  Does your library comply with Public Library Law under 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
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

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
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

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 the 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

(check at https://mylicense.in.gov/EVerification/Seac.aspx)
With the advice and recommendations of the library director, has the library board adopted the following plans and policies?

13-016 A schedule of classification of employees? Y/N
13-017 An annual schedule of salaries? Y/N
13-018 A proposed library budget? Y/N
Has the library board adopted the written personnel policies and procedures dealing with:

<table>
<thead>
<tr>
<th>Code</th>
<th>Topic</th>
<th>Y/N</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-019</td>
<td>Recruitment</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-020</td>
<td>Selection</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-021</td>
<td>Appointments</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-022</td>
<td>Personnel actions</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-023</td>
<td>Salary administration</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-024</td>
<td>Employee benefits</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-025</td>
<td>Conditions of work</td>
<td>Y/N</td>
</tr>
<tr>
<td>13-026</td>
<td>Leaves</td>
<td>Y/N</td>
</tr>
</tbody>
</table>
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

Boards and Bylaws

13-027 Does the library board adhere to the current approved principles provided by the Indiana State Library for library trustees?

13-028 Does the library have current, written bylaws that state its purpose and its operational procedures?

13-029 Do the library bylaws specifically state rules governing conflicts of interest issues?

13-030 Do the library bylaws specifically state rules governing nepotism?

13-031 Have the bylaws been reviewed by the board in the last three years?

13-032 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?
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

13-033 Does your library have a written collection development plan?

13-034 Does your library have a written circulation policy detailing the principles of access for all library materials and service?

13-035 Does our library provide support for continuing education for staff and trustees?
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

Long-Range Plan

13-036 Does the library have a written long-range plan?

13-037 What year did your current long-range plan begin?

13-038 What year does your current long-range plan end?

13-039 Has your long-range plan been reviewed and updated in the last three to five years, depending on the length of your plan?

13-040 Have copies of the plan, plus all updates and revisions, been filed with the ISL?
## PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

**Long-Range Plan**

Does your long range plan include:

<table>
<thead>
<tr>
<th>13-041</th>
<th>...a statement of community needs and goals?</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-042</td>
<td>...measurable objectives and service in response to the community’s needs and goals?</td>
</tr>
<tr>
<td>13-043</td>
<td>...an assessment of facilities, services, technology, and operations?</td>
</tr>
<tr>
<td>13-044</td>
<td>...an ongoing evaluation process?</td>
</tr>
<tr>
<td>13-045</td>
<td>...a plan for financial resources and sustainability?</td>
</tr>
<tr>
<td>13-046</td>
<td>...an equipment replacement schedule?</td>
</tr>
<tr>
<td>13-047</td>
<td>...a professional development strategy?</td>
</tr>
<tr>
<td>13-048</td>
<td>...a statement of collaboration with other public libraries?</td>
</tr>
<tr>
<td>13-049</td>
<td>...a statement of collaboration with other community partners?</td>
</tr>
</tbody>
</table>
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

13-050  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)

13-051  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.)

13-052  Does the library lend materials via a statewide reciprocal borrowing program?

13-053  Does the library lend materials using a local reciprocal borrowing agreement with at least one other public library district within Indiana?

13-054  If the answer to 13-053 is yes, please list libraries with which you have reciprocal borrowing agreements.
13-055 Does the library lend materials using the OCLC Resource Sharing system?

13-056 Is the library a member of Evergreen Indiana?

13-057 How many days a week does your library receive InfoExpress courier service?
Does the library provide adult services, including:

13-058  Reference services, including knowledge of and access to reference materials, including INSPIRE?

13-059  A collection of materials for adults?

13-060  A space designated for adults in each fixed location?

…Repeat for young adult and children’s services.
13-067 Are patrons who are unable to read regular print, because of a visual or a physical disability, provided access to large print books, Braille books, audiobooks, and/or enhanced media?

13-068 Does the library provide computers for the free use of all persons, regardless of residency?

13-069 Does your library provide a means for the public to print and make copies at each location?
PART 13 — COMPLIANCE WITH STANDARDS FOR PUBLIC LIBRARIES

Website

Does your library’s website include:

13-070 Current hours of operation?
13-071 A physical address (or addresses) for your library?
13-072 A map for each fixed location?
13-073 A telephone number?
13-074 An email address or other means of electronic contact?
13-075 A link to INSPIRE.in.gov?
13-076 Publicly posted policies including, but not limited to, circulation, fees, and internet use?
13-077 A link to the library’s online public access catalog?
13-078 A calendar or schedule of events and programs, updated at least monthly, including the dates for the library board meetings?
STATEMENT OF INTENT TO COMPLY WITH STANDARDS

PART 14
PART 15 — SUPPLEMENTAL QUESTIONS

15-001 Does your library charge fines for late materials? Y/N
15-002 If so, how much do you charge per item, per day for books?
15-003 If so, how much do you charge per item, per day for audio/visual materials?
15-004 Does your library charge a processing fee for lost or damaged items?
15-005 If so, how much per item?
15-006 Does your library offer fine forgiveness or amnesty? If so, please briefly describe alternative offered.
If you have used the services of a professional consultant or architect in the last 3 years (2016-2018), please provide their information here. Click “Add Group” to enter additional consultants.

15-007a Consultant or Company Name
15-008a Type of Consulting service performed
15-009a Street Address
15-010a City
15-011a State
15-012a Zip
15-013a Phone
15-014a Website
PART 15 — SUPPLEMENTAL QUESTIONS

15-019 What sort of one-on-one instruction does your library provide? Select all that apply:
- small device use (e-book readers, smartphones, tablets)
- computer instruction
- resume help

15-020 Does your library offer notary services? Y/N

15-021 If the answer to 15-020 is YES, how much (if at all) does it charge?

15-022 Does your library offer proctoring services? Y/N

15-023 If the answer to 15-021 is YES, how much (if at all) does it charge?
15-015 What types of continuing education do you make available to staff? Select all that apply:
- conferences
- webinars (live)
- webinars (archived)
- staff day
- professional roundtables
- other (describe)

15-016 Who at your library is eligible for professional development?
(Exp: part-time, full-time, librarians only, all staff)
CERTIFYING THE REPORT

- Sign
- Give to board president to review/sign
- Mail to ISL; postmark by March 1st
SUBMITTING THE REPORT

Step 1: Go to the Status tab. If needed, clear up any edit checks by making corrections or annotating with a federal note.
Submit Survey

Please review items below and then click "Submit Survey" button to the right to complete the survey process.

Step 1. Verify all questions have been answered.

Step 2. Review any questions that might have been flagged.

SUBMITTING THE REPORT

Step 2: Go to the Status tab OR the Submit Survey tab and click the green button.
YOU'RE DONE!

Celebrate.
You’ve earned it.
QUESTIONS?

Library Development Office
(800) 451-6028
ldo@library.in.gov

Angela Fox
(317) 234-6550
anfox@library.in.gov

Monday – Friday
7:30 – 4 pm